



Defense Health Agency

TECHNICAL MANUAL

NUMBER 6430.02, Volume 7
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DAD MEDLOG

SUBJECT: Defense Medical Logistics Standard Support (DMLSS) - Volume 7, Equipment Management and Equipment Maintenance

References: See Enclosure 1.

1. PURPOSE. This Defense Health Agency-Technical Manual (DHA-TM), based on the authority of References (a) and (b), and in accordance with the guidance of References (c) through (l), establishes the Defense Health Agency's (DHA) instructions for using the Defense Medical Logistics Standard Support (DMLSS) application. This DHA-TM provides Medical Logistics (MEDLOG) personnel and other DMLSS users with the technical guidance procedures necessary to use the application effectively and efficiently to carry out the mission of medical logistics support. The technical guidance contained in this DHA-TM volumes 1 through 10 are intended for use of the automated information system in support of MEDLOG business including contingency materiel management in the DHA.
2. APPLICABILITY. This DHA-TM applies to the DHA, DHA Components (activities under the authority, direction, and control of DHA), and all personnel to include: assigned or attached active duty and reserve members, federal civilians, members of the Commissioned Corps of the Public Health Service, contractors (when required by the terms of the applicable contract), and other personnel assigned temporary or permanent duties at DHA and DHA Components.
3. POLICY IMPLEMENTATION. It is DHA's instruction, pursuant to References (c) through (l), that:
 - a. DHA will exercise management responsibilities of Military Health System (MHS) MEDLOG functions in the MHS including implementing procedures, administering budgets and performing financial oversight at an enterprise level in order to ensure consistency, optimize performance, and meet strategic priorities across MHS MEDLOG activities, consistent with guidance from the Assistant Secretary of Defense for Health Affairs.

b. DHA will develop consistent standards for materiel management necessary for programmatic oversight of the Defense Health Program.

c. DHA established DMLSS as the authoritative information system that serves as the feeder system to financially accountable systems for DHA Activities and accountable property officers as outlined in Reference (d).

d. DHA Activities must use the DMLSS system, as prescribed in Reference (d), for all Medical Logistics business functions in the following modules, including, but not limited to: Customer Area Inventory Management (CAIM), Inventory Management, Equipment Management (EM), Equipment Maintenance (MA), Assemblage Management, Systems Services, and Facility Management (FM). These DMLSS modules provide a processing environment where personnel can accomplish automated processing for: inventorying, ordering, receiving, and issuing of materiel associated with operations, research and support prescribed by the DHA mission.

4. RESPONSIBILITIES. See Enclosure 2.

5. PROCEDURES. See Enclosure 3.

6. PROPONENT AND WAIVERS. The proponent of this publication is Deputy, Assistant Director (DAD) Medical Logistics (MEDLOG). When Activities are unable to comply with this publication the activity may request a waiver that must include a justification, to include an analysis of the risk associated with not granting the waiver. The requesting activity director or senior leader will submit the waiver request through their supervisory chain to the DAD MEDLOG to determine if the waiver may be granted by the Director, DHA or their designee.

7. RELEASABILITY. Cleared for public release. This DHA-TM is available on the Internet from the Health.mil site at: <https://health.mil/Reference-Center/Policies> and is also available to authorized users from the DHA SharePoint site at: <https://info.health.mil/cos/admin/pubs/SitePages/Home.aspx>.

8. EFFECTIVE DATE. This DHA-TM:

a. Is effective upon signature.

b. Will expire 10 years from the date of signature if it has not been reissued or cancelled before this date in accordance with Reference (c).

9. FORMS. The following Department of Defense (DD) forms are available from:
<https://www.esd.whs.mil/Directives/forms/>.

- a. DD Form 1149, Requisition and Invoice/Shipping Document
- b. DD Form 1348-1A, Issue Release/Receipt Document
- c. DD Form 250, Material Inspection and Receiving Report.

/S/
RONALD J. PLACE
LTG, MC, USA
Director

Enclosures

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ENCLOSURE 1

REFERENCES

- (a) DoD Directive 5136.01, “Assistant Secretary of Defense for Health Affairs (ASD(HA)),” September 30, 2013, as amended
- (b) DoD Directive 5136.13, “Defense Health Agency (DHA),” September 30, 2013, as amended
- (c) DHA-Procedural Instruction 5025.01, “Publication System,” August 24, 2018
- (d) DHA-Procedural Instruction 6430.04, “Use of the Defense Medical Logistics Standard Support (DMLSS) as the Authoritative Information System (IS) of Record for the Medical Logistics (MEDLOG) Enterprise Activity (EA),” December 20, 2019
- (e) United States Code, Title 10, Section 1073c, “National Defense Authorization Act for Fiscal Year 2017”
- (f) DHA-Procedural Instruction 6430.02, “Defense Medical Logistics (MEDLOG) Enterprise Activity (EA) Procedures,” September 27, 2018
- (g) DoD Directive 6000.12E, “Health Services Support,” January 6, 2011, as amended
- (h) DoD Instruction 6430.02, “Defense Medical Logistics Program,” August 23, 2017
- (i) DoD Directive 5000.64, “Accountability and Management of DoD Equipment and Other Accountable Property,” August 31, 2018
- (j) National Fire Protection Association 99, “Healthcare Facilities Code,” latest edition adopted¹
- (j) DoD Instruction 8500.01, “Cybersecurity,” August 12, 2015, as amended
- (k) DoD Instruction 8510.01, “Risk Management Framework (RMF) for DoD Information Technology (IT),” March 12, 2014, as amended
- (l) United States Government Accountability Office Manual, “Federal Information System Controls Audit Manual (FISCAM),” February 2009

¹ This reference can be found at: <https://www.nfpa.org/codes-and-standards/>

ENCLOSURE 2

RESPONSIBILITIES

1. DIRECTOR, DHA. The Director, DHA will assign all DHA Headquarters staff elements and DAD MEDLOG to implement this DHA-TM in accordance with References (b), (e), and (f).

2. DAD, MEDLOG. The DAD MEDLOG or designee must perform oversight of the delivery of all MEDLOG business functions at DHA Components in accordance with References (d) through (l).

3. DHA MEDLOG PERSONNEL. DHA MEDLOG personnel must follow the instruction (Customer Service Teams, MEDLOG Divisions, Branches and Sections, etc.) as appropriate for each volume of this technical manual.

4. DHA COMPONENT DIRECTORS. The DHA Component Directors must:
 - a. Ensure DHA Activities implement this DHA-TM.

 - b. Ensure Compliance with this DHA-TM.

 - c. Ensure the DHA Component Chief, MEDLOG maintains and accounts for all accountable medical and dental property and financial records on the equipment records in DMLSS.

 - d. Use the following DMLSS modules including, but not limited to: Customer Area Inventory Management (CAIM), Inventory Management (IM), Equipment Management (EM), Equipment Maintenance Activity (MA), Assemblage Management, Systems Services, and Facility Management.

 - e. Appoint a DMLSS System Administrator (SA) in writing; may delegate by-direction signature authority to DHA Component Chief, MEDLOG as necessary.

 - f. Implement procedures, guidance, and instructions for this DMLSS-TM.

5. DHA COMPONENT CHIEF, MEDLOG. The DHA Component Chief, MEDLOG must:
 - a. Maintain and account for all accountable medical and dental materiel and equipment and financial records as appropriate in DMLSS.

 - b. If designated by DHA Component Director, as described in paragraph 2. of this enclosure, appoint DMLSS SA in writing.

6. DHA COMPONENT, DMLSS SA. The DHA Component DMLSS SA must:

- a. Establish, manage, and maintain DMLSS user accounts, roles and privileges. The least privilege principle must be followed when creating or modifying user accounts.
- b. Ensure system backups and maintenance tapes are installed at pre-defined periodic intervals and perform manual backup procedures as necessary and as provided in DHA-TM DMLSS Volume 2, System Administration.
- c. Monitor the DMLSS Communications Manager functionality to identify and resolve transmission errors.
- d. Follow database auditing procedures as defined in DMLSS SA guide.
- e. Coordinate with DHA Component and Information Systems to house DMLSS hardware, and install and update DMLSS system software as required.
- f. Create and manage DMLSS tutorial databases.
- g. Review DMLSS advisory notices and notify local users as required.

7. DHA COMPONENT, HEALTHCARE TECHNOLOGY MANAGEMENT (HTM) MANAGER. The DHA Component HTM Manager must:

- a. Implement business practices and quality management processes. These processes are to continuously monitor and improve property accountability and sustainment operations.
- b. Use performance improvement initiatives and metrics to trend the overall effectiveness and efficiency of total cost of ownership, lifecycle, and sustainment program.
- c. Appoint a qualified HTM Sustainment Manager to manage the sustainment program.
- d. Appoint qualified Medical Device and Equipment (MDE) System Administrator(s) with privileged access to perform actions for MDE sustainment and cybersecurity requirements.

8. DHA COMPONENT, HTM SUSTAINMENT MANAGER. The DHA Component, HTM Sustainment Manager must:

- a. Manage operations ensuring unscheduled services (repairs) and scheduled services to include scheduled parts replacement on MDE are performed in accordance with procedures outlined in Reference (j).
- b. Monitor and action DMLSS inbox messages daily to ensure necessary tasks are performed as required.

c. Ensure the proper utilization and training for staff using DMLSS to manage the sustainment of MDE.

9. DHA COMPONENT, BIOMEDICAL EQUIPMENT TECHNICIAN (BMET). DHA Component, BMETs must:

a. Utilize DMLSS to document requirements and request all parts and/or contract service requests. Secure valid supply sources, points of contact (POC), part numbers, and costs. BMETs must cross reference all part requirements with manufacturer's literature confirming accurate part number and price before submitting parts request.

b. Check DMLSS individual work order inbox twice daily. BMETs must complete work orders in DMLSS by filling in labor time spent, parts information, and detailed notes.

c. Perform scheduled services as assigned in accordance with original equipment manufacturer's provided literature or Alternate MA plan in DMLSS. Provide a copy of completed scheduled services to property custodian at the completion of Scheduled Services.

d. Close all completed work orders in DMLSS within 24 hours of completion.

e. Verify MDE device code, serial number, model number, common model, nomenclature, and cybersecurity requirements when completing any sustainment service on MDE. BMETs must submit MDE Sustainment Surveys as required.

f. Account for all accountable hours in direct support of MDE sustainment in DMLSS.

10. DHA COMPONENT, EQUIPMENT CUSTODIAN. The DHA Component Equipment Custodian is responsible for the physical accountability of assigned assets within their area of responsibility in accordance with Reference (h). Equipment Custodians must ensure DMLSS data is current and accurate for all assets assigned to them.

11. DHA COMPONENT PERSONNEL. DHA Component Personnel will utilize instructions provided in this technical manual as needed for DMLSS access or completing needed transactions.

ENCLOSURE 3

PROCEDURES

1. EQUIPMENT MANAGEMENT (EM). The EM module within DMLSS provides automated functionality for managing equipment within the MHS. It is designed from a life cycle management concept that supports all related processes including new equipment requests, authorization, replacement budgeting, disposition and accountability. The integrated logistics approach minimizes administrative workload and access to automated data. The standard integrated information management system supports customers, functional users, and managers at all levels in the processes associated with life cycle management of equipment.

a. Overview. The EM main window appears once the application is launched from the System Navigation window. In this window, users can access the functionalities of EM through the menu options. The buttons on the horizontal toolbar can also be used to open selected functionality windows. The EM functionalities in this document are covered in the same order as they appear in the Navigate and Utilities dropdown menus located on the DMLSS EM menu toolbar.

b. EM Accountable Property Assets. Accountability for all managed equipment, including on-loan equipment, is managed by customer identification (ID) and custodian name.

(1) Any item, regardless of unit cost, may be maintained on an equipment record at the discretion of the DHA Component Chief, MEDLOG. These items may be assigned an equipment commodity class and maintained on EM accountable records in DMLSS.

(2) EM uses equipment records, specified in paragraph 1.h. of this enclosure, to maintain physical accountability, custodial responsibility, and fiscal accountability of all assigned assets.

c. Inbox. The inbox automatically opens upon accessing the application from the System Navigation window. It can also be viewed by selecting Inbox from the Utilities menu. Within the inbox, privileged users may view messages describing actions that are advisory or need to be completed. A detailed list of EM pending actions and their recommended use is available in Enclosure 4.

d. New Catalog Item. From the Navigate menu, select New Catalog Item and select military medical treatment facility (MTF) Catalog Items to view the MTF Catalog Equipment-New window. Refer to the DHA-TM DMLSS Volume 3, Catalog Records and Volume 4, Inventory Management for additional guidance on creating a new catalog record.

(1) At a minimum, enter all required information in the Basic tab. Note: Coordinate with the local HTM Sustainment section before processing new equipment catalog items to ensure accurate information is entered in the equipment record. How equipment items are loaded is critical to the sustainment/maintenance activity to ensure proper maintenance schedules and equipment classification.

(a) The commodity class (Figure 1) is important because it identifies an item as equipment, supply, or repair part. It also distinguishes between medical and non-medical items, and the element of resource used to fund the item. Each service maintains a unique set of classifications (refer to the future DHA-TM DMLSS Volume 3, Catalog Records and Volume 4, Inventory Management).

The screenshot shows a software interface for a Military Medical Treatment Facility Catalog. The 'Basic' tab is active, and the 'Item ID' is CP1-1E1. The 'Commodity Class' dropdown menu is open, displaying a list of options including 'EQUIPMENT-EXPENSE MEDICAL', 'CENT PROCURED/MANAGED NON-MEDICAL EQUIP', 'EQUIPMENT DURABLE - WRM SG MANAGED', 'EQUIPMENT EXPENSE - WRM SG MANAGED', 'EQUIPMENT-CAPITAL MEDICAL', 'EQUIPMENT-DURABLE MEDICAL', 'EQUIPMENT-CAPITAL NON-MEDICAL', 'EQUIPMENT-DURABLE NON-MEDICAL', 'EQUIPMENT-DURABLE NON-MEDICAL', 'EQUIPMENT-EXPENSE NON-MEDICAL', 'MAINTENANCE RECORD', 'PARTS/MATERIEL - FACILITY MANAGEMENT', 'PHARMACEUTICAL', 'REPAIR PART MEDICAL', 'REPAIR PART NON-MEDICAL', 'SUPPLY - WRM SG MANAGED', 'SUPPLY-DURABLE MEDICAL', 'SUPPLY-DURABLE NON-MEDICAL', 'SUPPLY-EXPENDABLE MEDICAL', 'SUPPLY-EXPENDABLE NON-MEDICAL', and 'TRANSPORTATION FUND'. The 'SOS' dropdown menu is also open, showing options like 'PVM - ROF PRIMARY - CARDINAL HEALTH'. On the right side, there are fields for 'Hazardous Material', 'Cold Chain Mgmt', 'Green Product', 'Latex Free', 'Special Handling', 'CIIC', 'Standardized', and 'Marked for Deletion'. A table at the bottom right shows 'Vendor Item Number', 'LOG SOS', 'Pricing Agreement', and 'Deleted' columns with rows for 'ACP1-1E1', 'P1-1E1', and '83CP11E1'.

Figure 1. Military Medical Treatment Facility Catalog, Commodity Classes

(b) As necessary, load any requisite DHA Component restrictions, special requirements, and destruction methods.

(2) After the Basic tab is complete, go to the Technical-Equipment tab (Figure 2).

The screenshot displays a software interface for managing equipment. It features several sections: a header with tabs for 'Basic', 'Technical-Equipment', and 'Log Cat'; a main data entry area with fields for 'Item ID', 'Short Item Description', 'Equipment Type', 'Equipment Nomenclature', 'Life Expectancy', 'Device Cd', 'Device Class', 'Maintenance Required', 'Accountable Equipment Code', 'TMDE', 'Line Item No.', 'Equipment SRC', 'Model Number', 'Equipment Category', 'End Item Code', 'Logistics Control Code', and 'Electrical Characteristics' (Voltage, Hertz, Phase); a section for 'RICC', 'Demilitarization Code', 'Material Category', 'Precious Metal Code', 'AAC', and 'COG'; and a 'Barcode Number' field. At the bottom, there are 'Add' and 'Delete' buttons.

Figure 2. Military Medical Treatment Facility Catalog Technical-Equipment Tab Window

(a) The Equipment Type field defaults to Individual. If the equipment item is a component of a system that is being purchased or gained, select Component for the Equipment Type. If the equipment item is a system, select System.

(b) The equipment nomenclature is a key element in the Technical Equipment tab, as it associates the device class, device code, maintenance requirement, life expectancy, and accountable equipment code indicator. The makeup of the device code is tied to maintenance procedures that are required by the BMETs. Changes can be made to information in this screen but only to increase maintenance requirements. Device codes are centrally managed in DMLSS. If the user requires the creation of a new device code, contact the DHA Global Service Center-help desk at: dhagsc@mail.mil.

(c) The Equipment Control Number (ECN) is system generated and assigned for the purpose of maintenance control. Items with the Maintenance Required box checked on the MTF Catalog have the following considerations:

1. The Maintenance Required indicator cannot be unchecked for an equipment item with a device code that requires maintenance.

2. Maintenance data for these items is stored in the equipment data records and updated as maintenance is performed by the BMETs.

(d) Items with the Accountable Equipment Code marked Y appear on the Custodian Receipt/Location List. This report lists the accountable equipment records for a customer account along with a certification/signature block for the equipment custodian. The report can be sorted by ECN, Item ID, or location sequence.

1. The system does not allow an accountable equipment code of “N” for an item with a device code that requires accountability.

2. Device codes whose accountability is listed as local require a choice between Y or N that is at the discretion of the DHA Component Chief, MEDLOG.

(e) Other areas that may require updating are the Electrical Requirements fields. The defaults for these fields are Voltage-110, Hertz-60, and Phase-Single. If outside the continental United States, or if there are different electrical requirements, change the information as required.

(3) After both the Basic and Technical-Equipment tabs are updated, select the Save icon on the toolbar. The basic catalog record is built and saved, and the “LOG Cat” tab becomes accessible.

(4) The “LOG Cat” tab allows selection of the primary Source of Supply (SOS) if one has been established.

(5) The Find icon in the vertical toolbar allows a search for item records in the MTF Catalog by Item ID, short item description, National Drug Code, National Stock Number, Universal Product Number, or manufacturer’s catalog number. Enter at least 3 characters in any field to search the MTF Catalog. The more information entered, the narrower the search results become. If a search does not return any results, change the search criteria and retry. If multiple items are listed after the search, view an Item ID by selecting the Detail button on the window side. Select Print, available from this search window, to print the items returned from the search.

e. Catalog Search. The EM Catalog Search functions the same as IM Search. Refer to the future DHA-TM DMLSS Volume 3, Catalog Records and Volume 4, Inventory Management for guidance.

f. SOS Search. The EM SOS Search functions the same as IM SOS search.

g. Equipment Accountability. The EM module allows users to process any action(s) that affect the accountability of the organization’s equipment. Accountability consists of gain, loss, transfer, and assembly/disassembly.

(1) Equipment gain is used to create records for equipment not acquired through the normal order/receipt process (e.g., inventory adjustments, gifts or donations, receipt from another DHA Component).

(a) To access the Equipment Gain window (Figure 3) from the Navigate menu, point to Equipment Accountability and select Gain, or select the Gain icon on the toolbar. In the Gain Information section, enter the Organization (name) where the equipment is being gained and select a transaction reason. The selected reason may require additional fields to be completed before adding the Item ID.

| Item ID | Nomenclature | Eq. Type | Qty. |
|---------|--------------|----------|------|
|---------|--------------|----------|------|

Figure 3. Equipment Gain Window

(b) When gaining an accountable item, DMLSS automatically creates an audit trail, increases the in-use equipment quantity, updates the customer account, generates updates to accounting records, and provides the option to print a Custodian Action List (CAL).

(c) When gaining an item with a maintenance requirement, DMLSS creates a work order for an acceptance inspection.

(d) Select the Add button and enter the Item ID of the gaining item. If the Item ID is unavailable, use the Jump To icon to search for a similar item in the MTF Catalog or create a new Item ID. After the Item ID is entered, enter the quantity to be gained in the quantity field.

(e) In the ECN List box, complete all mandatory fields. If the manufacturer or common models are not listed in the dropdown menu, use the Jump To icon to load the new data. The nameplate model data should be the official model designation found on the equipment data plate or tag. The acquisition cost should be actual cost of the equipment. DMLSS uses this dollar total to calculate maximum repair allowance figures in maintenance records.

(f) Multiple items may be gained to an organization by selecting the Add button after all data is entered for the first item. Complete all information for the second item and continue adding any other needed items.

(g) When all data is entered, select the Gain icon on the toolbar. The user is then prompted to print a CAL and barcodes during processing. If multiple records are generated, a CAL and barcodes for each customer entered is printed. After the record is updated, the Equipment Gain window displays the assigned ECN along with the processed record data. An IGE transaction is written to the equipment Transaction History File to record the gain.

(h) If there is a requirement to add additional information to the Equipment Detail record, select the Detail icon on the vertical toolbar. This action launches the Equipment Detail record for the new ECN. If multiple items were entered, buttons are viewable in the upper corner of the ECN List box to move between records. Update equipment information as needed.

(i) To process other gain transactions, select the New icon to reset the Equipment Gain window.

(j) The Pending Import from another DHA Component pending action message accommodates routine transfers between DMLSS servers by alerting users that they have received an equipment import file from another DHA Component and they need to process the equipment gain. Double-clicking on a row in either section or highlighting a row and selecting the Process button will take the user to the Equipment Gain screen.

1. Process a Gain transaction with the transaction reason of Gained from another DHA Component. The system displays a window advising that equipment records are available for importing. The user can then select the file for importing. Importing equipment records prevents duplicating Item Unique Identifications. After entering the data and selecting "OK," the system imports the MTF Catalog data, the equipment record, and all work order history associated with the equipment then deletes the import file. When the import process is complete, the system provides the user the option of viewing the new equipment records.

2. When an equipment record is processed as a loss with a transaction reason of Transferred to another DHA Component, the system creates a file containing the equipment record data, MTF Catalog data, and all work orders associated with the equipment then forwards the file to the DMLSS server selected as the ship to address.

(2) Equipment loss or transfer can be accomplished as follows:

(a) Loss is defined as a decrease in accountability due to (e.g., when equipment is transferred to another DHA Component or turned-in to Defense Logistics Agency (DLA) Disposition Services). Before processing any loss for equipment, coordination with the HTM Activity section must be completed to ensure there are no outstanding work orders.

1. To process a loss or transfer an equipment item from the Navigate menu, point to Equipment Accountability and select on Loss or Transfer. The Equipment and Technology

Management Search Criteria window opens. The user has the option to search for active or inactive records by selecting one or more fields. Enter the desired search criteria and select the Search icon.

2. The Equipment Search Results window (Figure 4) displays the results. Select the ECN of the items to be lost and select the Details icon on the vertical toolbar to view the Equipment Detail record. Select the Loss icon on the toolbar to open the Equipment Loss window (Figure 5). Enter the transaction reason for the loss and the form to print for supporting documentation. If the items are being shipped to another DHA Component or a vendor, the user needs to select the Routing Identifier Code and Department of Defense Activity Address Code/Organization (Org) Name.

The screenshot shows a software interface for equipment search. At the top, there is a search form with several input fields: Item ID, Org. ID, Nomenclature, Customer Name, Manufacturer, Custodian Name, Common Model, Assemblage Desc., Contractor, and Assemblage No. Below the form is a table with columns: Org. ID, ECN, Item ID, Nomenclature, Manufacturer, and Co. The table contains 30 rows of equipment records. On the right side, there is a vertical toolbar with icons for Find, Reset, Print, Filter, Detail, Barcode, Loss, Transfer, Asbly/Ds..., Refresh, Close, and Help Top... At the bottom, it shows 'Records 1 to 27 of 409' and 'Ready'.

| Org. ID | ECN | Item ID | Nomenclature | Manufacturer | Co |
|---------|--------|-----------------|---|------------------------------|---------|
| 3H5886 | 021443 | 5805WP321601 | ALARM, EQUIPMENT TEMPERATURE, REFRIGER | PHONETICS | SENSAR |
| DETC | 000275 | 6640LK307517 | LABORATORY STIRRER | THERMOLYNE CORP | |
| DETC | 000360 | 6640WP306007 | LABORATORY STIRRER | SCIENTIFIC INDUSTRIES INC | |
| DETC | 000427 | 6640LK417903 | COD REACTOR | HACH CO | |
| DETC | 000428 | 6640LK417902 | WASHER, LABWARE/SURGICAL INSTRUMENT, U | BRANSON ULTRASONICS CORP | 5210 |
| DETC | 000430 | 6670LK408904 | BALANCE, ELECTRONIC | DENVER INSTRUMENT | AB SERI |
| DETC | 000435 | 6640LK408903 | EVAPORATOR | BUCHI ANALYTICAL INC | |
| DETC | 000438 | 6640LK418200 | LABORATORY SHAKER | GLAS-COL CO | |
| DETC | 000566 | 4140LK818200001 | OVEN, LABORATORY, FORCED-AIR CONVECTION | VWR SCIENTIFIC PRODUCTS CORP | 1390FM |
| DETC | 000567 | 6640LK3740600 | MIXER, CLINICAL LABORATORY | PRECOR USA | |
| DETC | 000568 | 6640LK3740600 | MIXER, CLINICAL LABORATORY | ASSOCIATED DESIGN & MFG CO | |
| DETC | 012427 | 2247300 | LABORATORY HOOD, CHEMICAL FUME | LABCONCO CORP | 3980300 |
| DETC | 012428 | 2247300 | LABORATORY HOOD, CHEMICAL FUME | LABCONCO CORP | 3980300 |
| DETC | 012429 | 2247300 | LABORATORY HOOD, CHEMICAL FUME | LABCONCO CORP | 3980300 |
| DETC | 012430 | 2246300 | LABORATORY HOOD, CHEMICAL FUME | LABCONCO CORP | 3980300 |
| DETC | 012507 | N0770493 | ANALYZER, SPECTRUM | PERKINELMER INC | OPTIMA |
| DETC | 014811 | SC180 | HEATING BLOCK | ENVIRONMENTAL EXPRESS | HOT BL |
| DETC | 015809 | ADM870C | MULTIMETER, ANALOG | SHORTRIDGE INSTRUMEN | AIR DAT |
| DETC | 016340 | 099AV55504 | LABORATORY SHAKER | GLAS-COL CO | 3D FLOC |
| DETC | 016569 | 13986148 | FREEZER, LABORATORY | THERMO SCIENTIFIC | FREEZE |
| DETC | 017877 | 6665015870702 | DETECTOR, BETA/GAMMA RADIATION | BNC CORP. | 940 |
| DETC | 018909 | G3440A | CHROMATOGRAPHY SYSTEM, GAS | AGILENT TECHNOLOGIES | 2220 W |
| DETC | 018920 | M8380AA | COMPUTER | HEWLETT-PACKARD | 2220 W |
| DETC | 019120 | N2020006 | SAMPLER, LABORATORY, AUTOMATED | PERKINELMER INC | S10 AU1 |
| DETC | 019121 | N0780014 | ANALYZER, SPECTRUM | PERKINELMER INC | OPTIMA |
| DETC | 019291 | 6665LEVM7CO | MONITOR, ENVIRONMENTAL | QUEST TECHNOLOGIES INC | EVM-SE |
| DETC | 019292 | 6665LEVM7CO | MONITOR, ENVIRONMENTAL | QUEST TECHNOLOGIES INC | EVM-SE |

Figure 4. Equipment Search Results Screen

| ECN | Item ID | Nomenclature | Cust |
|--------|---------------|--------------|------|
| 017087 | 6515L25100900 | LIGHT, OTHER | AES |

Figure 5. Equipment Loss Window

a. This information is used to record the receiver, and it prints on the source document. Select “OK,” and the Ship to Address window will be displayed. Make any appropriate corrections and select “OK” to return to the Equipment Loss screen.

b. Note: The Routing Identifier Code and Department of Defense Activity Address Code must be loaded in the Ship to Address table within the System Services/Table Maintenance Utility module in order for these values to appear within EM.

c. After all information is entered, select “OK” to process the loss. The user is prompted to print a copy of the CAL for signature. An “ILE” transaction is written to the equipment Transaction History file. Refer to DHA or Military Service policy for transaction reason code. Required fields to be populated are: Condition Code, Disposal Authority Code, Precious Metals Code, Automatic Data Processing Equipment Code, Controlled Inventory Item Code, Demilitarization Code, and Reclamation Code. A CAL is produced, and an “ILE” transaction is documented (with a transaction reason code of “FLL”).

(b) Equipment transfer is used to change accountability for equipment items from one department or work section to another. Equipment that is moved between DHA Components is accounted for as a Loss.

1. To process a transfer of equipment items, from the Navigate menu point to Equipment Accountability and select on Loss or Transfer. The Equipment Search Criteria window opens. The option to search by one or many Equipment Classification fields, Owner/Custodian fields, Service Information fields, Acquisition Information, or Assemblage fields displays. Enter the required search information, and select the Search icon on the toolbar.

2. The Equipment Search Results window displays the results. Select the ECNs that are being transferred, and select the Details icon on the toolbar to view the Equipment Detail record. Select the Transfer icon on the toolbar to open the Equipment Transfer window.

3. Select the organization and customer to which the item is being transferred, and select “OK.” DMLSS generates the “CTE” transaction to record the transfer and creates a CAL to reflect the changes to each custodian account.

4. Equipment items determined to be excess to the needs of the organization and sub-Orgs may be transferred to the equipment excess account from the Equipment Transfers window. The DHA Component’s equipment excess account is established in System Services. The account is identified as the excess account for the DHA Component in the Equipment Service Detail record.

5. If the equipment item is considered excess, select the checkbox for Excess while in the Equipment Transfer window. The organization and customer fields default to the host Org and equipment excess account. Select “OK” to process the transfer action. DMLSS generates the CTE transaction to record the transfer and creates a CAL to reflect the changes to each custodian account.

(3) The Assembly/Disassembly function is designed to perform two different functions. The Assembly function is used to consolidate multiple pieces of ECNs into a single ECN, while the Disassembly function separates a single ECN into multiple ECNs. Equipment managers may need to use these functions to properly account for assets. Maintenance personnel may need these functions for proper work order management. Assembly/Disassembly (Asbly/Dsbly) can be accessed by selecting Equipment Accountability from the Navigate menu, and then Asbly/Dsbly. Upon selecting the Asbly/Dsbly menu, the Equipment Search Criteria window will automatically open. Search for the desired equipment records by using the available criteria.

(a) The Assembly function is used to consolidate ECNs

1. DMLSS anticipates multiple ECNs to be selected when performing an assembly action. Each piece of equipment must be associated to the same customer in order to complete the assembly action. In the Equipment Search Results window, select the equipment records to be assembled and then select the Asbly/Dsbly icon located on the vertical toolbar.

2. The highlighted equipment records appear in the Loss Information window. Add an Item ID to the Gain Information window (i.e., the Item ID used to identify the Assembled Equipment record). If necessary, use the Jump To icon to create a new catalog record and assign a new Item ID. Note: For an assembly action, the gain quantity defaults to one and is not editable. Likewise, when processing an assembly action, the new ECN Quantity is never more than one.

3. To complete the process, fill in all mandatory fields and optional fields, if possible. Every attempt should be made to load the actual acquisition cost. Once all data is entered, select the Gain icon located on the vertical toolbar to process the assembly action.

4. The assembly action produces an “EAD” transaction code using transaction reason Assembly Loss Equipment for each ECN listed in the Loss Information window. Additionally, an “EAD” transaction with transaction reason Assembly Gain Equipment is generated for the Item ID listed in the Gain Information window, and a new ECN is assigned.

(b) The Disassembly function is used to separate a single ECN into multiple ECNs or equipment records.

1. In this instance, DMLSS anticipates a single equipment record in the Loss Information window. Use the search function to locate the ECN being disassembled.

2. The highlighted record appears in the Loss Information window. In the Gain Information window, add an Item ID for each new equipment record. If necessary, use the Jump To icon to create a new catalog record and assign a new Item ID. Note: For disassembly action, a quantity must be loaded for each record added to the Gain Information window. Multiple units of the same item may exist.

3. To complete the process, fill in all mandatory fields and optional fields if possible. Every attempt should be made to load the actual acquisition cost, and the acquisition fund code should be annotated. Once all data is entered, select the Gain icon located on the vertical toolbar to process the disassembly action.

4. The disassembly action produces an “EAD” transaction code using transaction reason Disassembly Loss, Equipment for the ECN listed in the Loss Information window. Additionally, an “EAD” transaction with transaction reason Disassembly Gain, Equipment is generated for each Item ID listed in the Gain Information window, and new ECNs are assigned.

(c) Whether assembling or disassembling equipment records, DMLSS allows the user the option to print a CAL, and the option to generate new barcode labels upon saving changes.

h. Equipment Record. Not only does EM use equipment records to maintain physical accountability, custodial responsibility, and fiscal accountability of all assigned Org assets, HTM Sustainment Managers use equipment records to record loans, conduct inventories, and create equipment replacement schedules to support the budget process. Equipment records are also core components of the medical materiel quality control. For these reasons, a customer must be assigned to all custodian accounts.

(1) Equipment records are created through the receipt/issue process in IM or the equipment gain process. Once the equipment records are established and identification data has been entered, in-use equipment is assigned to the equipment custodian for the customer account.

(2) In addition to individual equipment records, there are also system and component records (i.e., equipment records may be linked together to create an association of a system), and the individual components that make up the system.

(3) Sustainment/maintenance activities jointly utilize the accountable and assemblage equipment records for maintenance purposes and may create additional equipment records for maintenance purposes that are non-accountable. After the records are created, the sustainment/maintenance activity responsible for maintenance of the equipment is entered in the record along with data used for scheduling maintenance services. The scheduling information is used to create scheduled work orders. The equipment records are also used when an unscheduled work order is created. Data related to the cost of maintenance services entered on the work orders is accumulated in the equipment record and used to identify maintenance problems and support the equipment replacement process.

(4) The Equipment Detail Record (Figure 6) opens as a result of accomplishing an equipment search.

(a) This record provides the current and life cycle information of an equipment item. The user has the ability to view currently active records that are maintained within the DHA Component or view records that are inactive and are no longer maintained as accountable records. Note: Inactive records are never deleted from the DMLSS database.

The screenshot displays the Equipment Detail Record window. At the top, it shows the following information: Org. ID: FF0850, ECN: 021437, Nomenclature: DEFIBRILLATOR, EXTERNAL, AUTOMATED/MANUAL, Item ID: 6515016449586, and Device Class: DEFIBRILLATORS. Below this is a navigation bar with tabs for Software, Network, Notes, and Main (selected). The Main tab is further divided into sub-tabs: Location & Inventory, Approval/Acquisition, Maintenance Data, Maintenance Cost, and Components. The main content area is divided into several sections: 1. Mfr. Identification: Manufacturer (ZOLL MEDICAL CORP), Division (CORPORATE), Nameplate Model (0847946099633), Common Model (PROPAQ MD), Mfr. Serial No. (AI15F004302), Acquisition Date (08 Jul 2015), Acquisition Cost (\$17,589.83), Life Expectancy (8 YEARS), and Asset Control No. (blank). 2. Equipment Type: Individual, System ECN (blank), Accountable Equipment (checked), Maintenance Required (checked), Ownership (ORGANIZATIONAL), Condition (B - SERVICEABLE (ISSUABLE WITH QUALIFICA)), Accounting Status (IN SERVICE), and Accounting Status Date (29 Sep 2015). 3. Owner/Custodian: Organization (DETACHMENT H (18 AES)), Customer Name (AES PMI), Customer ID (3F5881), Custodian Name (redacted), Custodian Phone (634-1556), and Subcustodian (blank). 4. Assemblage: Organization (blank), Assemblage Desc. (blank), and Assemblage No. (blank). On the right side of the window, there is a vertical toolbar with icons for Save, Revert, Print, Contract, Item ID, Loss, Transfer, AsblyDs..., Acq Cost, Barcode, Associate, Close, and Help Top...

Figure 6. Equipment Detail Record Window

(b) The Equipment Detail Record window is divided into several tab categories. Authorized users are encouraged to update all fields and keep data current to ensure the most accurate data is maintained. When changes are made to a tab, the user must select the Save icon to record the change data before moving to a new tab. Selecting the Revert icon reverts to the

last saved state for the record. The information below outlines the use and data required for each tab.

(c) The Main tab of the Equipment Detail screen provides the user with manufacturer identification information and management information for a specific ECN. This tab is divided into three sections: Manufacturer Identification, Owner/Custodian, and Assemblage.

1. The user may select a different Equipment Type from the drop-down list. When the Equipment Type is changed to “Component”, DMLSS displays a modal window and requires the user to enter an ECN in the System ECN data field.

2. The user may select Supply Condition Code from a drop-down list (if enabled).

3. Within the EM, the HTM Manager (Equipment Manager) has the capability of selecting the Accounting Status Awaiting Installation or In Service. Once the user changes the Accounting Status to In Service and saves the equipment record, the system disables the data field completely. Note: Ensure the appropriate accounting status is selected as this status may affect multiple factors including depreciation.

4. The Assemblage section displays information about the associated assemblage if the equipment is in a customer owned assemblage. Use the Assemblage button on the vertical toolbar to add or change assemblage information in this section.

(d) The Location and Inventory tab of the Equipment Detail screen provides the user with equipment location and inventory information. It identifies the location of the selected equipment item to include building, floor, room, and temporary location. The Inventory Information section of the tab provides the following inventory information: Last Inventory Date, Inventory Entry Method, Inventory Performed Date, and Inventory Reason. All fields in the Inventory Information section are display only and cannot be edited. When the last inventory date is within 90 days of the annual inventory anniversary date, a message is posted to the EM Inbox notifying the user of the required inventory.

(e) The Approval and Acquisition tab provides the user with information concerning the purchase of the item. This tab is divided into four sections: Approval Info, Purchase Info, Warranty Info, and Universal Identification Info. This tab provides some historical reference on the procurement process and installation of the item. The Universal Identification Info section of the screen data is related to the DoD mandate to assign a Unique Identification Number to an equipment record for tracking throughout its life cycle. These data fields are not editable.

(f) The Maintenance Data tab provides information concerning maintenance of an equipment item. This tab is divided into two sections: Organizational Support and Maintenance Plan. This tab identifies the sustainment/maintenance activity, other government agency, or contractor who is responsible for providing maintenance for the item. It further breaks down required maintenance cycles based on the procedure number assigned, operational status, risk

levels, readiness code, Maximum Expenditure Limit, and Maximum Repair Limit Cumulative totals for repair determination.

1. Contains Patient Data Checkbox. When performing a loss on a piece of equipment identified as having patient data, DMLSS alerts the user with the following message: ECN(s) (list of ECN(s)) contains patient data. Remove all references to patient data prior to processing the loss transaction.

2. Life Support Checkbox. Once an equipment record is identified as Life Support equipment, all work orders for this equipment then denote the equipment as Life Safety on the main tab of the work order.

3. Suspend Scheduled Work Order Checkbox. To suspend scheduled work orders for a specific ECN, check the Suspend Scheduled Work Order Indicator checkbox and enter a cause in the Suspend Reason field.

(g) The maintenance cost tab provides a historical look at repair and labor time and cost on a piece of equipment. The tab displays downtime and number of unscheduled work orders. It is divided into organizational and contract repairs and provides values for parts costs, unscheduled time and labor, and scheduled time and labor. The data on the Maintenance Cost tab is display only. The user can view a collective of all time and cost estimates by history or view by fiscal year for up to 10 years.

(h) The Components tab is only enabled when a system type detail record that contains components is selected. The tab lists all components of the system by ECN and Item ID. When in this window, the user can select a component and double-click to open the equipment detail record for the component. Since entering the System ECN in the component record makes the association, the data on this screen cannot be edited. The detail record of a component may be accessed by selecting and double-clicking the component in the display. The system acquisition cost for the system and all the associated components is listed at the bottom of the tab.

(i) The software tab displays information for equipment related software. The user can add software from this window or load software from Equipment Software in the Navigate menu. The user can also view information on existing software information loaded in the window.

(j) The network tab provides information for equipment that is attached to the network. It also contains history of software updates by providing for multiple entries of the following data elements: Software Title, Version, Installed By, and Date Installed.

(k) The notes tab provides the user with the capability to enter text relating to an equipment record. Users may add, edit, or delete notes for a specific equipment item; however, system generated notes cannot be edited or deleted. DMLSS displays all notes on a list screen sorted by date in descending order. Double-click on a note to view the complete note.

(5) The Equipment Detail vertical toolbar (Figure 6) allows the user to perform additional tasks when working in this window.

(a) The Acquisition Cost icon allows the user the ability to factor in various elements that would affect the end acquisition cost of an equipment item. The actual cost of the equipment is important for the budgeting process when life expectancy is nearing an end or when determining repair versus replacement. After receipt or gain of an equipment item, this window allows the user to enter applied discounts, trade-in values, transportation costs, installation costs, upgrades, and any other cost associated with the value of the equipment. The new acquisition cost is then applied to the detail record.

(b) The Barcode icon allows the user to print a new barcode label for the selected equipment record. The barcode then prints to the selected printer.

(c) The Contract icon is accessible if an item is associated with an existing contract. When a contract is initially loaded in DMLSS, the user should enter the associated ECNs that apply to the contract. Selecting the icon allows the user to view the contract information loaded in the Service Contracts module.

(d) The Item ID icon allows the user to perform an Item ID change when there are like or similar items on the Equipment Detail records. Select the Item ID that requires changing and open the Equipment Detail record. Select the Item ID icon and enter the new Item ID. The commodity class, equipment type, accountable equipment indicator, and maintenance required fields must match to process the Item ID change. Changes to these fields may be performed in the MTF Catalog record. Select the Assign button to process the Item ID change. DMLSS processes a “SNZ” transaction and prints a CAL.

(e) The Print icon allows printing of a Historical Maintenance Report or an Equipment Detail Report. The reports print to the user’s local printer.

i. Equipment Balance. The Equipment Balance module provides the HTM Manager the capability to manage authorizations and view equipment balances

(1) Equipment authorizations may be created, edited, and deleted. When an equipment balance search is performed, the system displays the authorizations as well as the on-hand balances for accountable in-use equipment items that meet the search criteria.

(2) To access the Balances window, from the Navigate menu, select Equipment Balance or select the Balance button on the toolbar. The Equipment Balance search window opens and requires the user to enter a device class, Item ID, nomenclature, or Line Item Number.

(3) The Balances window (Figure 7) displays the requested results by authorizations and balance information. Additional filter criteria can be entered in this window to further narrow the search parameters.

Filter Criteria

Organization:

Device Class:

Nomenclature:

Item ID:

LIN:

Authorizations

| Item ID | Nomenclature | LIN | Organization | Qty | Auth. Reference |
|---------------|------------------------------|--------|--------------------|-----|-----------------|
| 6515013595395 | DEFIBRILLATOR, EXTERNAL, MAN | | 18TH MEDICAL GROUP | 1 | 041 |
| 6515014519872 | DEFIBRILLATOR, EXTERNAL, MAN | D86072 | 18TH MEDICAL GROUP | 1 | 041 |
| 6515015161519 | DEFIBRILLATOR, EXTERNAL, MAN | | 18TH MEDICAL GROUP | 27 | 041 |
| 6515FD00M7655 | DEFIBRILLATOR, EXTERNAL, MAN | | 18TH MEDICAL GROUP | 4 | 041 |
| 6515LK030001 | DEFIBRILLATOR, EXTERNAL, AUT | | 18TH MEDICAL GROUP | 10 | 041 |
| 6515LK422313 | DEFIBRILLATOR, EXTERNAL, MAN | | 18TH MEDICAL GROUP | 1 | 041 |

Balance Information

| Item ID | P/S | Auth. Reference | Authorized | In Use | Due In | On Loan | Leased | Excess |
|-----------------|-----|-----------------|------------|--------|--------|---------|--------|--------|
| 6515012869605 | | 041 | 1 | 0 | 0 | 0 | 0 | 0 |
| 6515013503546 | | 041 | 2 | 0 | 0 | 0 | 0 | 0 |
| 6515013543150AE | | 041 | 2 | 0 | 0 | 0 | 0 | 0 |
| 6515013595395 | | 041 | 1 | 0 | 0 | 0 | 0 | 0 |
| 6515014519872 | | 041 | 1 | 0 | 0 | 0 | 0 | 0 |
| 6515014794272 | | | 0 | 1 | 0 | 0 | 0 | 0 |
| 6515014811257 | | | 0 | 2 | 0 | 0 | 0 | 0 |
| 6515015161519 | | 041 | 27 | 0 | 0 | 0 | 0 | 0 |
| 6515015161519 | | | 0 | 1 | 0 | 0 | 0 | 0 |
| 6515015824060 | | | 0 | 4 | 0 | 0 | 0 | 0 |
| 6515015824072 | | | 0 | 10 | 0 | 0 | 0 | 0 |
| 6515015997958 | | | 0 | 12 | 0 | 0 | 0 | 0 |
| 6515015997958 | | | 0 | 1 | 0 | 0 | 0 | 0 |
| 6515015997958 | | | 0 | 155 | 0 | 0 | 0 | 0 |
| Totals: | | | 83 | 370 | 0 | 0 | 0 | 0 |

Figure 7. Equipment Management Balances Window

(4) When equipment balances exceed authorizations, managers should conduct research and add or edit authorizations to equal balances.

(5) The Balance Information box displays totals for equipment authorizations, in use, due-in, on-loan, leased, and excess by Item ID. The authorizations should match the collective totals of the remaining fields (e.g., Authorization=In-Use+Due-In+On-Loan+Leased+Excess). Note: Valid conditions may exist causing the authorizations and balances not to equal, e.g., approved/unfunded requirements.

(6) Select the Add button to create a new authorization detail for an Item ID with a balance record and no authorization. In the Authorization Detail window, enter the Item ID, Org, authorization quantity, and authorization reference, and then select “OK.” The increased item authorization quantity is added to the Authorizations List box and the Balance Information box.

(7) Select the Edit button to modify an existing authorization quantity. In the Authorization Detail window, enter the modified authorization quantity and select “OK.” The quantity fields in both the Authorizations and Balances boxes reflect the increase or decrease in authorization quantities. If the quantity entered is zero, the authorization no longer appears in the Authorization box after processing.

(8) DMLSS generates a Decrease Equipment Authorization transaction for an equipment decrease and an Increase Equipment Authorization transaction for the equipment increase.

j. Equipment Classification. The Equipment Classification function supports both EM and maintenance requirements. It supports the requirement to manage medical equipment based on a medical-legal risk assessment and involves establishment of centralized tables. Local business practices determine whether EM or sustainment/maintenance personnel establish and maintain equipment classification records. Procedures for creating and updating devices, device classes, manufacturer, and common model data are contained in paragraph 2.a. of this enclosure, Equipment Maintenance (MA).

k. Equipment Loan. The Equipment Loan function is used to track equipment that is lent to individuals and internal or external organizations when authorized by the organization's approval authority.

(1) EM personnel can establish, modify, or delete loan accounts as needed. Unique loan account IDs are generated by DMLSS and cannot be duplicated within the Org. Once a loan account has been created, information on equipment and/or durable items can be entered and associated with the loan account. The user can print the Loan Receipt/Location Lists and the Loan Action Lists for signatures and documentation of the loan.

(2) DMLSS sends messages to the Inbox to alert the user when loaned equipment and/or durable items are nearing or have reached the end of the loan period. If a loan period has been approved for extension, select the Renew icon on the Loan Information toolbar, and enter the additional days required.

(3) To access the Loan Information window, from the Navigate menu, select Equipment Loan or select the Loan icon on the toolbar. Select "New" to start a new loan, or Open Loan to view current loans. Select a loan then select Detail.

(4) The new loan_window is divided into three tabs: Borrower Info, Items, and Notes.

(a) The borrower info tab identifies the type of loan, loan-to information, and loan-from information. Do NOT use this function to record patient information. DMLSS is not designed or intended to contain Protected Health Information or Personally Identifiable Information and it is strictly prohibited. A warning is displayed on screen when using this function. Complete any other accessible fields within the tab. Accurate data is important in the event the item is returned due to drug/equipment recall, equipment calibration, or loan times have exceeded time allowances.

(b) The Items tab is where durable items and equipment are assigned to the borrower.

1. Select the Loan button under Durable Items and enter the Item ID, description, unit of sale price, quantity, and loan days. Select "OK" to add the item to the Durable Items List. If multiple items are being loaned, select Loan and enter the new information.

2. Select the Loan button under Equipment Items and enter ECN and loan days. Select OK to add the item to the Equipment Items List. If multiple items are being loaned, select Loan and enter the new information.

3. Use the Notes tab to enter information about the loan. Select the Add button to load a note. For example, notes may include training/use of the loan items, communications between the borrower and the loan office, or extension requests.

4. The borrower may have multiple loan items against a single loan account. As items are returned to the activity, the user can go into the Items tab and select the item being returned. HTM Sustainment inspects equipment items before they are returned to inventory. Check durable items for serviceability. Annotate the notes tab with the condition of the return.

5. Upon selecting the Print icon on vertical toolbar, DMLSS prompts the user to select the (1) Loan Action List, (2) Loan Receipt Location List, or (3) Loan Account List.

6. When all items are returned, select the Delete icon on the toolbar to mark the account for deletion. DMLSS now deletes loan accounts during the end of month processing. The account must be marked for deletion, all equipment records must have a return date greater than 12 months, and all durable items must be returned. If the loan account has durable items only, it will be removed during the next end of month process after the account is marked for deletion.

7. Records marked for deletion may be undeleted if the loan account still exists for the borrower. Select the Undelete icon on the toolbar to undelete the loan account. Complete the tabs for the new loan items.

(5) Use the Open Loan function to search for, view, and update existing equipment loan records. Once an existing record is retrieved, it may be modified using same system functionality as loading a new loan record.

(6) Use the Loan Reminder List as a tool to contact the individual. When the reminder letter is sent, the user can enter the Letter Sent Date in this area. In the Loan Reminder List window, the user can also print one or more loan reminder records.

1. Equipment Request. EM Office will follow DHA procedures regarding new equipment requests. The DMLSS Equipment Request module is used for initiating and tracking an equipment request through the process of requesting, approving, funding, ordering, and receipting of equipment. Select Equipment Request and then New Request from the Navigate menu, or select the Request button on the horizontal toolbar to access a new Equipment Request Detail window. Note: While new equipment requests can be initiated from EM, it is recommended that customers have appropriate access and initiate new equipment requests in the Customer Support application as explained in the future DHA-TM DMLSS Volume 6, Customer Applications. By initiating the request process, custodians have visibility and can monitor the status of existing equipment requests, as well as verifying fund availability within Customer Support.

(1) The following are steps to perform a New Equipment Request. The Equipment Request Detail window (Figure 8) is divided into fourteen tabs that identify the equipment item, replacement equipment items, customer, SOS, total funds required, maintenance requirements, facility requirements, training requirements, and coordination. Each tab contains mandatory and/or optional data fields that are used by the offices and personnel involved in the request process to explain and define the exact details of the equipment request. In most cases, a specific office or individual is responsible for a tab; however, in some instances, tabs may require input from multiple offices.

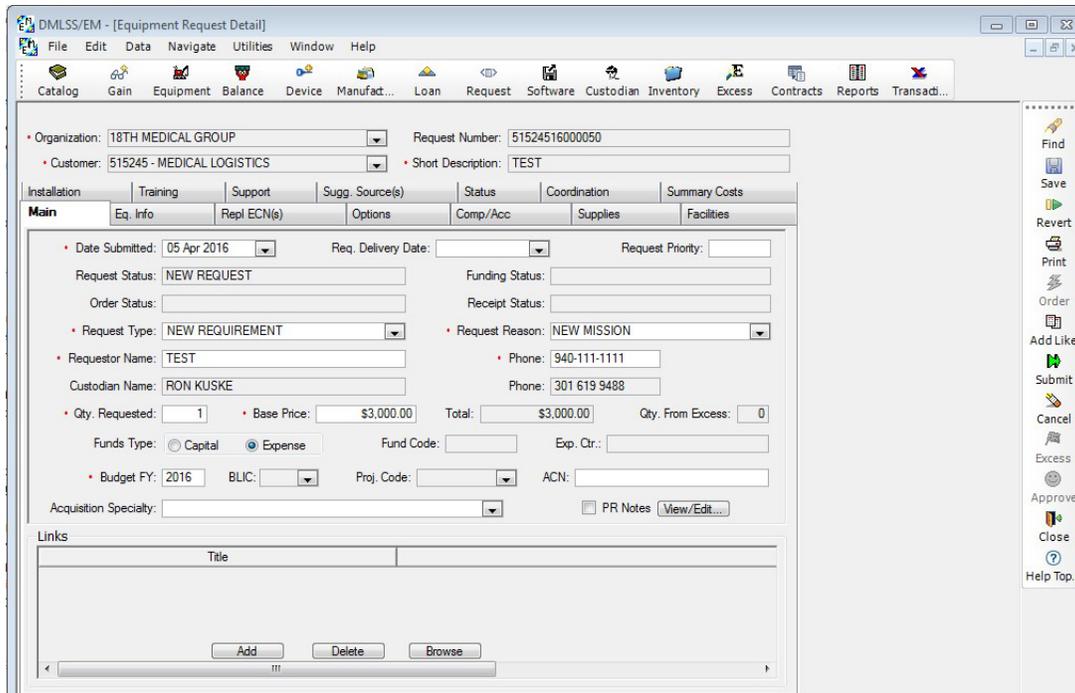


Figure 8. Defense Medical Logistics Standard Support Equipment Request Detail Window

(a) In addition to the Main tab, custodians should provide data in the following tabs displayed in Figure 9.



Figure 9. New Equipment Request Tabs – Custodial Responsibility

1. The Main tab provides basic information about the request. Initially, it is the only editable tab.

a. At a minimum, enter all mandatory information indicated by a red dot on the Main tab, and correctly identify the funds type as Capital or Expense.

b. Select Add in the Links section to add attachments to an equipment request using the same functionality as adding a digital photo to an equipment record. The user can add Uniform Resource Locators as well as image, document, PDF or text files to an equipment request. Error messages are displayed if the new file link fails the security checks.

c. Select Save located on the vertical toolbar once all data is entered into the Main tab. An equipment request number is assigned, and the remaining tabs become available.

2. Custodians should use the Replacement ECNs Tab to identify the ECNs if existing equipment items are being replaced or upgraded. Entry is mandatory in this tab if the request type is Normal/Accelerated Replacement or Upgrade.

3. The Supplies Tab – Custodian Input tab gives the custodian an opportunity to list operating supplies and/or repair parts needed in conjunction with the equipment request.

4. If operator training is required, the custodian must check the Training Required checkbox and enter detailed training information.

5. Custodians should use the Suggested Source(s) tab to identify at least three suggested sources for the requested item. This is not necessarily the manufacturer but could be any supplier. Check the Primary Source box to indicate which source is the primary or preferred source of purchase.

6. The DMLSS equipment request process is designed to be an electronic process. However, if the custodian identifies any additional documents in the Main tab, those documents should be delivered to the HTM section so they can be retained in the Equipment Request file.

7. Custodians should select the Submit button once they have completed their entries. Once submitted, the custodian is limited to viewing the request, and it is routed to HTM personnel via the Customer Equipment Request Submitted pending action within their inbox. Each equipment request should follow a standard routing process as shown in Figure 10.

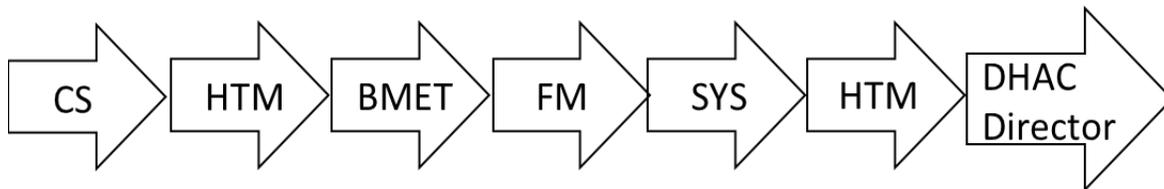


Figure 10. Defense Medical Logistics Standard Support Equipment Request Routing Process

(b) The HTM section has primary responsibility for the overall success of the equipment request process; therefore, it is responsible for the accuracy of all information entered into each request prior to submitting it to the local approval authority. Specifically, the HTM section should provide data in the following tabs (See Figure 11).

| | | | | | | |
|--------------|----------|-------------|-----------------|----------|--------------|---------------|
| Installation | Training | Support | Sugg. Source(s) | Status | Coordination | Summary Costs |
| Main | Eq. Info | Repl ECN(s) | Options | Comp/Acc | Supplies | Facilities |

Figure 11. New Equipment Request Tabs – Healthcare Technology Management Section Responsibility

1. Use the Main tab to verify data submitted by the equipment custodian.
2. The following describes the content of the Equipment Information tab.
 - a. Item ID. If a catalog record already exists for the requested item, enter the Item ID. Local procedures determine whether a new catalog record is created at this point or after the purchase is approved.
 - b. Federal Stock Class (FSC). The FSC is automatically assigned in conjunction with the Item ID. The FSC is linked to the device nomenclature.
 - c. Nomenclature (Device Nomenclature). The nomenclature is populated upon assigning the Item ID.
 - d. Manufacturer. Use the Jump To button to assign the appropriate manufacturer from the internal table.
 - e. Model. Enter the manufacturer's model number.
 - f. Manufacturer Division. This field is directly linked to each manufacturer. If a division is assigned to a manufacturer, it appears in the dropdown menu.
 - g. Submit Order To. Auto populates upon assigning the Item ID. This information is directly linked to the default SOS assigned in the MTF Catalog record.
 - h. External Procurement. Not required.
3. Within the Replacement ECN tab, verify the custodian entered the correct Equipment Control Number(s) in this tab if the request type is Normal/Accelerated Replacement, or Upgrade. Make corrections as necessary.
 - a. Disposal options are Turn-in or Retain. This information helps to ensure that proper disposal actions are taken.
 - b. Replacement/upgrade comments can also be added for future reference. The HTM section uses this information to verify turn-in of replaced equipment upon issue of the new equipment.

c. The Replacement Item Received/Turn-in Replaced Item pending action appears in the EM Inbox upon issuing the new equipment to the customer. The HTM section is responsible for ensuring the replaced equipment is turned-in and removed from custodial responsibility.

d. Within the Supplies tab, review and verify all supplies and repair parts required as part of the initial purchase are loaded into the Supplies tab. Sustainment/maintenance verifies the need for repair parts prior to returning to the HTM section. Note: Supplies are ordered separately.

e. Within the Training tab, ensure all training requirements are documented in this tab. Required training could be operator and/or MA training. If operator training is required, the custodian must check the Training Required checkbox and enter detailed training information. Generally, sustainment/maintenance personnel add the sustainment/maintenance training requirements during their review.

f. Within the Suggested Sources tab, verify the custodian has provided at least three possible sources of supply. The Primary Source indicator should be checked for one SOS indicating the preferred source. If the Sole Source indicator in the Main tab is checked and the custodian provides a sole source letter, then only one suggested source is needed. Assist the custodian with this tab as necessary.

g. The Status tab drives the bulk of the action after submitting the request. Approval, funding, and ordering is initiated from within this tab. Once the local approval authority has approved or disapproved the request, update the Status tab appropriately. If total request quantity is approved for purchase, the HTM section accesses the equipment request, enters the approved quantity and date in the Status tab, and then selects the Approve button. Upon doing so, the Request Status field updates to Approved and the Funding status updates to Unfunded status. The Request Status field in the Main tab updates accordingly. Once funded, update the applicable funding information. The Funding Status field in the Main tab updates accordingly. Also, add status notes as necessary.

h. The Coordination tab aids with documentation of the request coordination. Upon initial review, the HTM section is responsible for adding required reviewers to the Coordination tab. At a minimum, add the HTM section, HTM Sustainment, facilities and system's POCs. However, it is highly recommended that the HTM section add all individuals participating in the review process, including the approval authority. HTM section should ensure the data fields in this tab are updated even when a printed copy is used during the Equipment Review meeting. Add Reviewers by selecting the Add Reviewer button. In the Reviewer Name window, enter their name and select "OK." Note: Reviewers added in this tab are not automatically notified via DMLSS, email, etc. Ensure everyone in the routing process has access to the equipment request tabs in DMLSS. The Equipment Manager should create a custom role for the reviewer allowing access to the request status tab (Figure 12) and the EM Read Only role.

| | | | | | | |
|--------------|----------|-------------|-----------------|----------|--------------|---------------|
| Installation | Training | Support | Sugg. Source(s) | Status | Coordination | Summary Costs |
| Main | Eq. Info | Repl ECN(s) | Options | Comp/Acc | Supplies | Facilities |

Figure 13. New Equipment Request Tabs – Maintenance Responsibility

1. When reviewing the Equipment Information tab, in addition to the data requirements listed below, maintenance personnel should validate the manufacturer and model number. Once the Item ID is assigned, they should also verify the correct nomenclature is assigned to ensure proper maintenance cycles are applied to the requested item.

a. Check the Requires use/interface with existing system checkbox and enter an explanation of requirements if the requested item is going to be used with an existing asset.

b. Check the Performance Criteria checkbox and enter a detailed explanation if specific performance criteria is needed.

c. Add and/or remove notes as necessary within the Note section.

2. The sustainment/maintenance activity is responsible for identifying the equipment characteristics and additional options required as part of the initial purchase of the requested item within the Options tab.

3. The sustainment/maintenance activity is responsible for identifying additional components and accessories required as part of the initial purchase of the requested item within the Components/Accessories tab.

4. The sustainment/maintenance activity must use the Add button to identify repair parts required as part of the initial purchase of the requested item within the Supplies tab.

5. The sustainment/maintenance activity is responsible for identifying installation requirements within the Installation tab. Use the data fields as explained below.

a. Check the Installation Required indicator if the requested item requires installation.

b. Use the dropdown menu to specify who is responsible for installing the requested item to complete the Installation field.

c. To complete the Installation Requirements field, use the Add button to specify maintenance and/or facility requirements that need to be in place prior to installing the requested item (e.g., electrical requirements).

d. Use the Add button to specify additional notes pertaining to the installation of the requested item within the Installation Notes field.

6. The sustainment/maintenance activity should use the Add button(s) within the Training tab to specify training required for maintenance personnel in order to maintain the requested item and to enter additional notes.

7. The sustainment/maintenance activity is responsible for identifying all support criteria within the Support tab.

a. Check the Acceptance Inspection Required indicator if the requested equipment requires an acceptance inspection.

b. Use the dropdown menu to identify the activity responsible for providing sustainment/maintenance support within the Maintenance Activity field.

c. As applicable, Check Yes or No within the field Do You See Problems with Providing Maintenance Support? If yes, provide an explanation.

d. Within the Maintenance Will be Provided field, place a check next to one of the following: Organizational – Check if a local sustainment/maintenance activity is responsible for providing maintenance support (e.g., a sustainment/maintenance activity assigned to the DHA Component). Service Contract – Check if maintenance support is going to be outsourced. Other Government Agency – Check if a government agency not located within the DHA Component is responsible for providing maintenance support (e.g., supporting Medical Equipment Repair Center or Precision Measurement Equipment Laboratory).

e. Enter the estimated annual cost of maintaining the requested item in the Estimated Annual Service Cost field.

f. To complete the Literature Requirements field, use the Add button to identify required manuals and other documents (e.g., service manuals).

8. Add reviewer recommendation and comments as necessary in the Coordination tab.

9. After coordination with HTM Sustainment, the HTM section should notify Facility Management that the request is ready for review and action. The facility management function is not automatically notified by DMLSS.

(d) Make sure the facility is prepared to install and operate the new equipment. FM personnel are responsible for determining what utilities are needed, if environment concerns are associated to the new equipment, and whether or not facility modifications are essential. Facility Management should provide data in the following tabs (See Figure 14).

| | | | | | | |
|--------------|----------|-------------|-----------------|----------|--------------|---------------|
| Installation | Training | Support | Sugg. Source(s) | Status | Coordination | Summary Costs |
| Main | Eq. Info | Repl ECN(s) | Options | Comp/Acc | Supplies | Facilities |

Figure 14. New Equipment Request Tabs – Facility Management Responsibility

1. The Facilities tab contains indicators Facility Management personnel should use to make these determinations.

a. Select the appropriate checkboxes for the facilities/utilities that are requisite for the new equipment. If not required, check the “N/A” indicator. Check the Required and Available indicators as necessary. Usually, if both the Required and Available indicators are checked, a facility modification is not required. If the Required indicator is checked but the Available indicator is not, then a facility modification is required.

b. Use the Hazardous, Radiation, and Radioactive checkboxes to indicate whether these environmental compliance concerns accompany the purchase of the requested item. Check the N/A, Generates, and/or Uses indicator as necessary.

c. Facility Modification indicator is a required indicator if a facility modification is necessary to meet utility and/or environmental compliances. If checked, enter the work request number and the cost of modification(s). The facility modification costs display in the Facility Modification Cost field in the Summary Costs tab when Include Cost in the Request indicator is checked.

2. The Facility Manager also identifies installation requirements in the Installation tab. See paragraph 1.1.(1)(c)5. of this enclosure.

3. Add reviewer recommendation and comments as necessary within the Coordination tab.

4. After coordination with the Facility Management, the HTM section should notify the Medical Information Systems POC that the request is ready for their review and action. The information systems function is not automatically notified by DMLSS.

(e) Information Systems should determine whether the Local Area Network (LAN) and/or communication requirements are required to support the requested item and provide data in the following tabs (See Figure 15).

| | | | | | | |
|--------------|----------|-------------|-----------------|----------|--------------|---------------|
| Installation | Training | Support | Sugg. Source(s) | Status | Coordination | Summary Costs |
| Main | Eq. Info | Repl ECN(s) | Options | Comp/Acc | Supplies | Facilities |

Figure 15. New Equipment Request Tabs – Medical Information Systems Responsibility

1. To complete the Facilities tab, systems personnel are responsible for determining whether the LAN and/or communication requirements are needed to support the requested item. If not, check the “N/A” indicator. Check the Required and/or Available indicator(s) if they apply.

a. Prior to saving the tab, DMLSS requires that every utility have a check placed in one of its three available status columns. Due to this requirement, Facility Management and Medical Information Systems should coordinate on their responses before the tab is saved. Based on local procedure, the HTM section should get verification that both reviews were done.

b. Coordinate with Facility Management personnel when a facility modification is needed in conjunction with these requirements.

2. Add reviewer recommendation and comments as necessary in the Coordination tab.

(f) After the coordination phase is complete, the HTM section reviews the tabs and submits the request. This updates the status to Awaiting Approval. The equipment request is ready for the DHA Component Director, or other local approval authority review. Local policy dictates whether the approval process is electronic or if a printed copy of the equipment request is essential. If necessary, select the Print button located on the vertical toolbar to obtain a printed copy of the entire equipment request and obtain the needed approval signature(s). If attachments apply, combine the printed request with custodian provided attachments.

(g) The following information applies to the approval of a request.

1. If total request quantity is approved for purchase, the HTM section accesses the equipment request, enters the approved quantity and date in the Status tab, and then selects the Approve button located on the vertical toolbar. Upon doing so, the Request Status field updates to Approved and the Funding Status updates to Unfunded.

2. If a partial quantity is approved for purchase, enter the approved quantity into the Approved Quantity (QTY) field in the Status tab, and DMLSS automatically populates the Disapproved QTY with the difference between the requested and approved quantities. The Request Status field updates to Approved; however, the Status Notes within the Status tab reflect the approved and disapproved quantities.

(h) The following information applies to the disapproval of a request.

1. If the total request quantity is disapproved, the HTM section accesses the equipment request and enters a quantity of zero into the Approved QTY field in the Status tab. The Disapproved QTY field is immediately populated with the request quantity. At this time, use the dropdown menu to assign a Disapproved Reason, select Save, and then select "Yes" in the message box to acknowledge disapproval. If disapproved, the process terminates.

2. A partial disapproval equates to a partial approval explained in paragraph 1.1.(1)(g)2. of this enclosure.

(i) If at any time the custodian chooses to withdraw the equipment request, select the Cancel button located on the vertical toolbar. Select "Yes" to confirm cancellation when the

message, “You have marked this record Canceled by Customer and will not be able to change the record after the action is saved. Do you wish to continue?” appears. The Request Status changes to Cancelled. Do not use the cancellation function as a substitute for the disapproval function.

(j) System Cancellations of Equipment Requests have the following considerations.

1. Any equipment requests with an Equipment Request Status equal to Filled by Excess, Disapproved, or Cancelled are removed if the request is 36 months earlier than the end-of-month (EOM) date.

2. Any equipment requests with an Equipment Request Status equal to New Request are removed if the request is 60 months earlier than the EOM date.

3. Equipment Requests that have been received and are now inactive are removed when the funded date of the most recent fund record is 36 months earlier than the EOM date.

(k) Funding considerations are as follows:

1. As previously stated, when a request is approved, the Funding Status updates to and remains Unfunded until the HTM section updates the funding information in the Status tab. If locally funded, apply the applicable expense center. If centrally funded by DHA, associate the request to the appropriate Other Procurement fund record.

2. If the total request quantity is funded, the Funding Status updates to Funded once the funding information is applied to the request. The Order Status tab updates to Not Ordered.

3. If a partial quantity is funded, the Funding Status updates to Partially Funded and the Order Status updates to Not Ordered. Note: The remaining unfunded quantity cannot be funded until the originally funded quantity is ordered.

4. Once the total request quantity is funded, the Funding Status field updates to Funded.

5. A Status Note is added reflecting the funded quantity each time funding is applied to the request.

(l) The following instruction applies when ordering equipment

1. HTM section places orders on approved and funded equipment. By selecting the Order button, the IM Offline Order window appears. Data entered into the equipment request automatically populates the data fields within the Offline Orders window. After validating the data, the authorized Procurement Agent executes the order. DMLSS creates IM due-in and due-out records and updates the equipment request with the document number of the

order. The Order Status field updates to Ordered and the Receipt Status updates to Open Due-Outs.

2. If a partial quantity was funded and ordered, the Order Status field updates to Partial Ordered and the Receipt Status updates to Open Due-Outs.

3. Once the total request quantity is ordered, the Order Status field updates to Ordered and the Receipt Status remains at Open Due-Outs.

4. A Status Note is added to the Status tab when the equipment orders are processed.

(m) The following applies for receiving equipment.

1. Once receipts process for the total request quantity, the Receipt Status updates to Received.

2. If a partial quantity is received, the Receipt Status updates to Partial Received.

3. A Status Note is added to the Status tab when the equipment receipts are processed.

(n) Once a new request is completed, the Add Like function takes the information from that request and transfers the majority of the Main tab information to a new Equipment Request Detail. The organization, customer, requestor's name, and quantity requested are required in the Main tab. The user can also modify other fields that are not disabled if changes are required.

(o) Equipment requests being filled by excess received from another DHA Component or from local equipment excesses can be applied against an existing requirement by selecting the Excess icon on the vertical toolbar. Enter the quantity and select "OK" to apply the excess quantities to the requirement. The available purchase quantities are reduced by the entered excess quantity, and the reason Filled by Excess is applied to the Request Status field in the Main tab.

(2) From the Navigate menu, select Equipment Request. Then select Open Request, which opens the Equipment Request Search window, or select the Request icon on the toolbar to access the Equipment Request Search window. Next, select the Search button to show all equipment requests within the results panel. Searches may be performed with any of the criteria in the drop-down boxes. The Equipment Request Search function allows users to search for existing requests using the following criterion: Organization, customer, Item ID, nomenclature, or request number by status and type. The main use of this function is to follow a request through the approval and funding process. All notes and detailed information added during the review process are visible as the data is entered and saved.

m. Equipment Software. The Equipment Software module provides the capability to manage software records for installed, embedded in equipment, or stored software for later distribution. Users can create the software records and link them to individual equipment items. These records can help identify the type and version of software with problems or requiring updates. The tracking of available software and installed software provides immediate visibility of assets and puts the facility in a better position to handle available upgrades from various vendors.

(1) To access the Software window, from the Navigate menu, select Equipment Software. Select New Software, to open a blank Equipment Software detail window, or select Open Software and select Search to view all software records within the results panel. Searches may also be performed with any of the criteria in the drop-down boxes.

(a) The equipment software detail window is divided into three tabs: Software Info, License Info, and Notes.

1. Enter the software specifics and equipment nomenclature in the Software Info tab. If a company or nomenclature is not available, select the Add button to add the respective information. The software version number and type are also important elements of this tab. Other optional fill fields are Operating System and Literature Reference.

2. DMLSS tracks all available licenses. Enter the software medium, licensing information, quantities, acquisition and expiration date, and cost in the license info tab. The lower half of the tab allows the user to associate key values to equipment items. Note: The user is not able to associate more equipment items than available licenses.

3. Use the Notes tab to enter information about the software. Select the Add button to load a note. Notes could include training/use of the software, communications between the sustainment/maintenance activity and vendors or customers, or extension requests.

(b) Multiple software licenses can be loaded by selecting the Add License button. This option is used when there are multiple software licenses from the same company. When software is no longer required for a piece of equipment and there is a requirement to return the software to the company or send the equipment to another installation or DLA Disposition Services, the user needs to delete the software record. Select the Delete License button to remove the software license record. This action also removes the associated equipment.

(c) When all software from a particular company is no longer used, select the Delete icon on the toolbar to mark the company for deletion.

(d) Records marked for deletion may be undeleted if the company still exists. Select the Undelete icon on the toolbar to undelete the company and add the new license info as necessary.

(2) To access the Software window, from the Navigate menu, select Equipment Software. Select Open Software to open the Equipment Software Search window and select

Search to view all software records within the results panel. Searches may be performed with any of the criteria in the drop-down boxes. Users should search for existing software records prior to adding new records. Searches can be conducting by Org, company, nomenclature, version, and type. The main purpose of this function is to view and modify existing equipment software records and to minimize duplication of records.

n. Custodian Management. Custodian Management provides the capability for the HTM Manager to manage data on equipment custodians. The HTM Manager establishes new POC records, assigns custodians to customer accounts from new or existing POC records, modifies custodian records, changes custodial responsibilities, and removes custodians when no on-hand equipment or equipment due-ins exist for the customer account.

(1) The account custodian may be granted systems rights to establish, modify, or delete sub custodians. These sub custodians are responsible for small sections of the account. For example, an eight dental treatment room Dental Clinic has a primary property custodian assigned. The primary custodian may want to assign equipment accountability to the technician responsible for each dental treatment room. The primary property custodian can appoint each technician as a sub custodian for each dental treatment room. The sub custodian's name is associated to the customer account and once these records are established the application facilitates the assignment of equipment to sub custodians for custodial responsibility. Custodial responsibility of sub custodians may be removed by disassociating the equipment from the sub custodian record.

(2) To access the Customer/Custodian List from the Navigate menu, select Custodian Management. The window default scope view is set to Customers with Custodians. All customers with custodians assigned appear in the Custodians box within the window. Change the scope to All Customers to view all customer accounts by Org. The window also allows the user to minimize search criteria by setting filters. The user has the option to minimize the search by Org, customer name, customer ID, and/or custodian name. The results are displayed in the Custodians box.

(3) To view custodian and inventory information, select a customer and select the Details icon on the toolbar. Within the Custodian Detail window, Custodian tab (Figure 16), the user can view and update the custodian's information.

The screenshot shows a software window titled "Custodian" with three tabs: "Custodian", "Subcustodian", and "Notes". The "Custodian" tab is selected. The window is divided into two main sections: "Custodian Info" and "Inventory Info".

Custodian Info:

- Last Name: [REDACTED]
- First Name: DAVID
- Phone #1: 634-9329
- Organization: 18TH MEDICAL GROUP
- Phone #2: [REDACTED]
- Office Code: 82 RS
- Fax: [REDACTED]
- Building No.: [REDACTED]
- Room No.: [REDACTED]
- Email: [REDACTED]
- Work Area: [REDACTED]
- Start Date: 13 Nov 2015 (dropdown)
- Rank/Grade: TSGT
- Orientation Date: [REDACTED] (dropdown)
- Title: CUSTODIAN
- Departure Date: 01 Nov 2017 (dropdown)
- User ID: [REDACTED]

Inventory Info:

- Customer ID: 2A301M
- Customer Name: 82 RECON SQUADRON
- Last Inventory Date: [REDACTED]
- Inventory Method: [REDACTED]
- Next Inventory Date: [REDACTED] (dropdown)
- Last Inventory Reason: [REDACTED]

Figure 16. Custodian Detail Window, Custodian Tab Window

(4) The Custodian tab also allows the user to update the next scheduled inventory under Inventory Information. The inventory date entered cannot exceed 365 days. This date is used to send notice to the Inbox and to the customer 30 days prior to the official inventory date for the selected section. This allows for both the HTM section and customer to prepare for the inventory.

(5) To add sub custodians to the account, select the Sub Custodian tab in the Custodian Detail window. Enter the sub custodian's basic information in the window. The information is similar to building a primary custodian. Select the Save icon on the toolbar before assigning equipment.

(a) To assign equipment to the user, select the Assign/Unassigned Equipment button. Select the equipment. The sub custodian is assigned using the Unassigned Equipment box. Use the associate single/all buttons, < or << to assign the equipment. Select Save when all equipment is assigned. The assigned equipment is then displayed in the Customer's Equipment, Assigned Equipment box.

(b) If there is a need to assign multiple sub custodians, select the Add Sub Custodian button, enter the next sub custodian's information, and assign the accountable equipment for which they are responsible. All sub custodians for a customer ID are displayed at the top of the window.

(c) The Print option is available to the HTM Manager (equipment manager) and primary account equipment custodian that allows the printing of a Sub Custodian Receipt/Location List for each sub custodian. The primary property custodian should maintain the current Sub Custodian Receipt/Location List in their accountable property records folder.

(d) Use the Change Sub Custodian button when the primary property custodian wants to make changes to sub custodian's basic information. Select the sub custodian that is being replaced and select the Change Sub Custodian button. Complete the new record screen with the new custodian's information. When the user selects the Save icon on the tool bar, the new record replaces the selected custodian's information and all equipment transfers to the new sub custodian. The primary custodian should ensure that the new sub custodian has validated the inventory records prior to accepting the account from the replaced sub custodian.

(e) Before a sub custodian can be deleted as an accountable property custodian, all assigned equipment must be reassigned to the primary property custodian. The primary property custodian may reassign the equipment to an existing sub custodian after the equipment is returned to the primary account. Select the Assign/Unassigned Equipment button to disassociate assigned equipment. Select all equipment items and select the Disassociate button >> to move all records back to the unassigned equipment box. Select Save to return to the Custodian Details window. The assigned equipment box should be empty. Select the Delete Sub Custodian button to remove the sub custodian.

(f) The sub custodian is responsible for all items assigned to them; however, the primary property custodian is still responsible for all equipment assigned to their account. Discrepancies should be identified immediately to ensure quick resolution.

(6) The Notes tab allows the HTM section to enter small information bits (up to 256 characters) concerning a custodian or the status of a custodian's account. This feature allows for tracking status of open issues, Report of Survey actions, training conducted, or anything else relevant to the property account.

(a) To access a note, double-click in the Note field. The message box then opens to allow notes to be entered at that time. When all notes are entered or updated, select the Save icon on the toolbar.

(b) An option to delete comments is also available when data becomes irrelevant or no longer needed.

(7) Custodial responsibility may be removed provided an inventory is accomplished prior to this action. Changing an existing primary property custodian is done by selecting the Change Custodian icon in the Customer/Custodian List window. This opens the Custodian Detail window for which the customer ID custodian is responsible. Enter the new custodian's information in the Custodian tab and select Save. If sub custodians exist for the account, a message is displayed prompting the user to determine if the existing sub custodians should be retained. If Yes is selected, all information is transferred under the new custodian. If No is selected, all sub custodians are deleted, and all equipment associated to the sub custodians is disassociated and returned to the new primary property custodian. The new custodian may reassign sub custodians as needed.

(8) The Remove icon in the Customer/Custodian List window allows the HTM section to remove a custodian when no longer required. A custodian cannot be removed if accountable

equipment records are on-hand or due-in or if the primary custodian has sub custodians assigned. These items must be located and transferred to other property custodians, EM hold account, or reported excess before the account is removed. When the user selects the Remove icon, all customer and custodian information is deleted from the Customer/Custodian List in DMLSS.

(9) The Refresh icon resets the window to what is current in the database. Some changes are not reflected in the window until this icon is pushed or the user exits and reenters the window.

n. Equipment Inventory. The Equipment Inventory module allows the user to create, conduct, reconcile, and resolve equipment inventories. The user can identify the scope for the inventory, and DMLSS generates an inventory file for the selected parameters and assigns an Inventory Control Number (ICN). Note: Recommend the user make note of the ICN for future research and use.

(1) The equipment inventory method may be manual, hand held terminal (HHT)-batch, or radio frequency (RF) mode. In the manual inventory mode, the user prints the equipment inventory list and uses it to perform the physical inventory. Once the physical part of the inventory is complete, the user returns to DMLSS and updates the inventory records. The HHT allows the user to perform the inventory by scanning barcode labels on the equipment instead of visually reading the labels. The HHT is also an alternative input device for updating the inventory file with the information from the physical inventory. The HHT can be used in a Batch Mode or an interactive RF mode.

(2) Once the inventory records have been inputted and updated to the inventory file, the user can reconcile and complete the inventory. DMLSS displays the overage/shortage list when discrepancies exist for a customer account. The shortage list includes those equipment items that were not updated. The overage list includes those equipment items that were manually added by the user or found during the HHT inventory process. The user can perform corrective actions for selected records on the overage/shortage screen.

(3) To access the inventory module from the Navigate menu, select Inventory, and select New Inventory or select the Inventory icon on the toolbar. Search for existing inventories by entering search criteria or select the “New” button to establish an inventory for an organization, customer, or custodian.

(4) The Create Equipment Inventory Window is shown in Figure 17. New inventories require entry of inventory method, reason, Org, and scope, at a minimum.

The screenshot shows a software window titled "Create Equipment Inventory". It features several sections of input fields:

- Inventory Method:** A dropdown menu.
- Inventory Reason:** A dropdown menu.
- Organization Name:** A dropdown menu.
- Device Class:** A dropdown menu.
- Nomenclature:** A dropdown menu.
- Organization Scope:** A section containing:
 - Scope:** A dropdown menu.
 - Custodian Name:** A dropdown menu.
 - Customer Name:** A dropdown menu.
- Item Scope:** A section containing:
 - All Items**
 - Items Not Inventoried Since:** A dropdown menu.
 - Filter By:** A section with "Acquisition Cost From:" and "to:" text boxes.
 - ECN Line Items:** A checkbox above a table with columns "ECN" and "Nomenclature".

At the bottom of the window are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

Figure 17. Equipment Inventory Listing Window

(a) Inventory methods determine how the inventory is going to be performed. Choose between Manual, HHT-Batch, or RF.

(b) User will identify the specific inventory being performed by selecting from the drop-down menu in Inventory Reason. Examples of inventories are: Command directed, equipment custodian change, HTM activity manager change, routine, and special. Command directed and special inventories allows inventory of specific device classes and nomenclatures. An example of a special inventory could be conducting an inventory of all defibrillators in the DHA Component.

(c) Organization Name identifies the organizational assets or the organization of the customer's assets being inventoried.

(d) Scope identifies the range of equipment assets to be inventoried. Identify the Organization Scope using the Create Equipment Inventory screen in EM. Three options are available for this scope: (1) all of the custodian's equipment, (2) all of the customer's equipment, or (3) all of the organization's equipment. For the purposes of performing the in-use equipment inventory, users should also complete the Items Not Inventoried Since field within this screen. In this field, users enter the date after the last in-use equipment inventory performed in order to obtain results. For example, if a site used an inventory date of "5/15/2018" to perform the previous in-use equipment inventory, then the user should enter a date of "5/16/2018" to perform the new search. Note: DMLSS accepts specific categories of work

orders completed by a BMET as an inventory action. In these cases, the Last Inventory Date in DMLSS is updated at the time of the work order completion. These items do not appear on the resulting equipment inventory list when the Items Not Inventoried Since field is used.

(e) Select OK to process the inventory requirement and view the Equipment Inventory Listing window for selected scope criteria. During processing, DMLSS assigns an ICN to requirements. The purpose of the ICN is to keep track of inventories that are not complete.

(f) The Equipment Inventory Listing window (Figure 18) lists all equipment items identified by the search criteria by customer ID, equipment control number, Item ID, nomenclature, equipment type, system equipment control number, permanent location, temporary location, and on loan status. As the inventory is updated, the inventoried, date inventoried, and inventory performed by fields are populated.

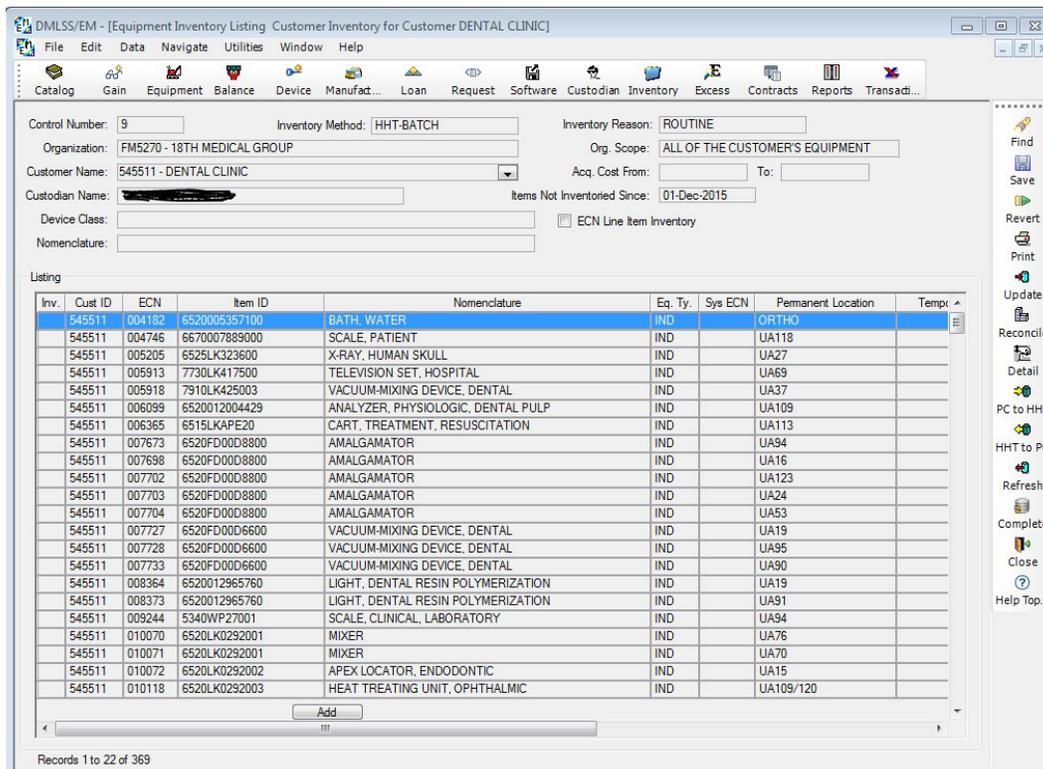


Figure 18. Equipment Inventory Listing Window

(5) If performing a manual inventory, the user may want a copy of the inventory listing to use for documentation.

(a) Select the Print icon on the toolbar to print a selected inventory or all inventories pending completion.

(b) To manually update an inventory, select an equipment record and select the Update icon on the toolbar. Verify date of inventory and enter the person's name that performed the inventory (if different) and select "OK." The Inventory field displays a "Y," and the date inventoried and inventory performed by fields populate with entered information. This information is saved and remains as part of the inventory record during the inventory cycle.

(6) Hand Held Terminal Radio Frequency (HHT-RF) inventories update DMLSS as the inventory process is being performed. The future DHA-TM DMLSS Volume 10, DMLSS Reports contains HHT customer replenishment procedures for batch and RF modes.

(7) Hand Held Terminal in Batch Mode (HHT-Batch) inventories work the same way as RF inventories, except that the inventory file must be downloaded from DMLSS to the HHT before the inventory can be performed. The future DHA-TM DMLSS Volume 10, DMLSS Reports contains HHT customer replenishment procedures for batch and RF modes.

(8) Any items found during inventory not on the custodian's equipment property records should be added to the inventory for validation. Select the Add button at the bottom of the inventory list to view the Add ECN to Inventory window and enter the ECN and Inventory location. Ensure the name of the individual who found the item is in the Performed By field. The item is added to the immediate inventory list.

(a) Scanned inventory items are added to the inventory during batch upload or in real time if inventory was performed in RF mode.

(b) Do not update equipment records for items that were not found during inventory. These records are handled as part of inventory reconciliation.

(c) View the Equipment Items Detail record anytime during the inventory by selecting the Details icon on the toolbar. The Equipment Details window provides information on items to aid in the inventory process.

(d) When the inventory is completed, select the Reconcile icon on the toolbar to view the Equipment Shortage/Overage window. The window lists all shortages and overages identified during the inventory. Validate this list prior to completing the inventory.

(e) When shortages are discovered during the inventory, formal actions may be required to investigate the loss.

1. Select the Loss icon on the toolbar to process the loss. In most cases, select Manual for form number. If research is found that the item was sent to another DHA Component or DLA Disposition Services, select either DD Form 1149, Requisition and Invoice/Shipping Document or DD Form 1348-1A, Issue Release/Receipt Document. There is the option to print a copy of the CAL as a result of processing. DMLSS generates an "ILE" transaction to record the loss.

2. The Match icon compares the items listed in shortages and overages and lines up items listed in both window views.

(f) Research overages to determine the reason an overage exists. Equipment might have been changed between customers without coordination with HTM section, excess equipment may have been received and not coordinated with HTM section, or documentation may have been submitted to turn an item in but the equipment was never given to maintenance or the HTM Manager.

1. The overage field provides ownership customer ID and where the overage was found.

2. If the item is in this section is a result of transfer, select the Transfer icon on the toolbar. DMLSS processes the “CTE” transaction to record the transfer action. The CAL as a result of processing can be printed, if necessary. If the transfer is correctly listed on the CAL, the item is considered reconciled for inventory purposes.

3. If the item belongs to the custodian listed in the ownership field, select the Return icon on the toolbar. The item is cleared from the inventory list and returned to the proper owner. The item is considered reconciled for inventory purposes.

4. If the item is needed in the inventoried location and it is not currently listed on a customer account, select the Gain icon to add the item to the inventory. DMLSS prompts completion of the equipment gain. If a MTF Catalog Record does not exist, create one by using the Jump To icon while in the Equipment Gain window.

5. DMLSS processes the IGE transaction to record the gain action. The option to print the CAL is available to document the transaction. This item is considered reconciled for inventory purposes.

(g) When corrective actions on all shortages and overages are complete, select the Complete button on the toolbar to complete the inventory. The option exists to complete single user inventories or multiple inventories.

1. Reconciling the inventory updates the equipment and custodian records and sets the next required inventory date in the equipment detail records.

2. To print a copy of the Custodian Receipt/Location List, select the Reports icon on the horizontal toolbar, select Standard Inquiry, and select Custodian Receipt/Location List from the report name list. There is an option to save the file as a .TXT file for instances when an electronic copy is needed.

(h) To open an existing inventory that is not complete, select the Inventory icon on the toolbar and select the ICN. Once the inventory opens, updates can be performed.

o. Equipment Excess. EM Excess allows the user to view, report, follow-up, and transfer potential excess items. Equipment items classified as excess are transferred to the EM Excess Standard Service/Customer account (as specified by DHA or Military Service) identified in the EM Services Detail record. Serviceable items listed in this service/customer are considered potential excess and are displayed in the EM Excess window.

(1) Access the EM Excess window (Figure 19) from the Navigate menu by selecting Excess or by selecting the Excess icon on the toolbar. The EM Excess window displays ECNs for potential excess and reported excess. Basic item details are viewable for each equipment item as selected.

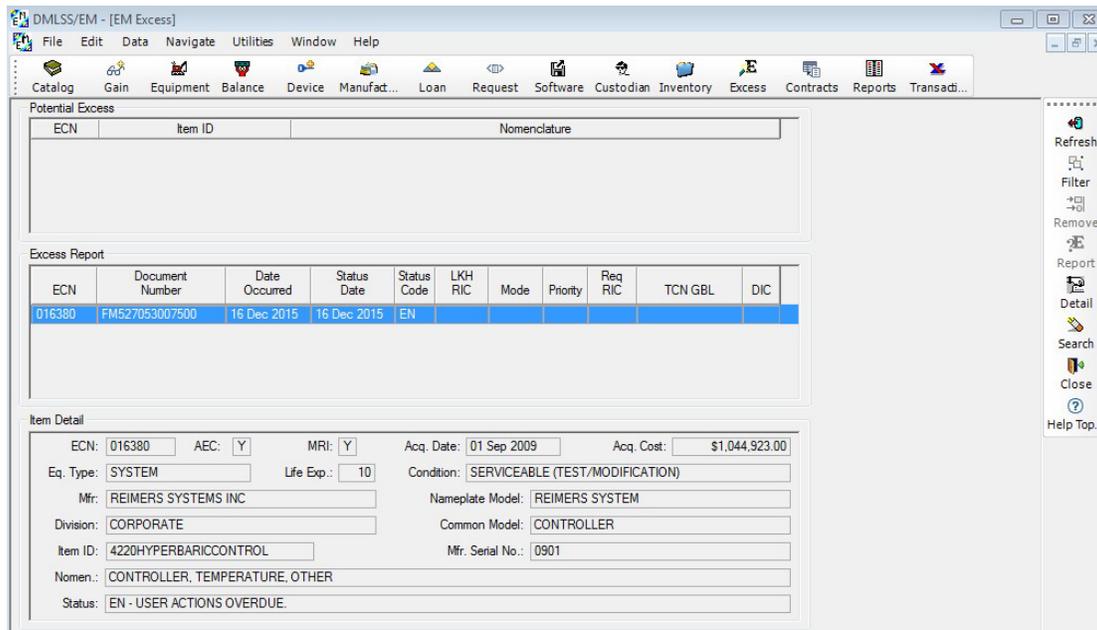


Figure 19. Equipment Management Equipment Loss Window

(2) Specific equipment items can be searched for by limiting searches using the Filter icon. The filter option narrows the equipment search by ECN, Item ID, or document number. The search displays results by the equipment's current excess state of either Potential Excess or Excess Reported.

(3) If an item currently in excess can be utilized within the main organization or a sub organization, transfer the item to the gaining custodian using the Remove icon on the toolbar. The Remove option performs an equipment transfer of the item from potential equipment excess records to the gaining custodian. A CTE transaction is processed and written to the equipment Transaction History file. DMLSS also generates a CAL to document the loss from the equipment account and the custodian gain.

(4) The Search icon is enabled when reviewing reported excess. Search allows the user to search all excess records.

(5) The following are steps to follow when reporting excess.

(a) Select an ECN from potential excess and select the Report icon on the toolbar. The equipment is assigned a document number from the 7500-7999 serial block with status code ES and moved to the Excess Report within the Excess window. The outgoing requirements are sent during end-of-period processing. To view the detail status of the Excess Report, select the Detail icon on the toolbar. The detail window provides excess detail information and status for each reported item.

(b) For detail status processing, from the Excess Report Detail window, follow-up or cancellation status can be processed against reported excess requirements. To process status against an equipment excess item, select the Status Request icon on the toolbar. Excess status processing is completed from the IM module and updated equipment records.

(c) Generate follow-up status when status has not been received from Tri-Service Medical Excess Distribution System within five days of the initial requirement being sent. Follow-up status generates status code excess file (EF) and posts the status to the Status tab within the window. Note: The status tab displays document identifier codes and status codes processed for that detail record. If not familiar with a status code listed in the Status tab, select the Description icon on the toolbar to view the status codes description.

(d) Cancellation of an equipment item generates status code "EC" and posts the status to the Status tab within the window.

p. Contracts. The Contracts icon is linked to the Service Contracts module of DMLSS and provides a method for recording information on service contracts. The service contract records can be linked to equipment records to track equipment leases. When equipment is entered on service contract records, the equipment record reflects the service contract information. Once a service contract record has been created, users can record calls placed against that contract and record the receipt of the services.

(1) The New Call icon opens the Call detail window and allows the user to enter call information associated with a contract for services required to be performed.

(a) Complete all required information and enter any applicable notes associated with the call. Multiple Contract Line Item Numbers (CLIN) can be entered for a call by selecting the Add button.

(b) If the call is being performed against an equipment item with a work order, enter the work order number and ECN.

(c) Saving the call detail information adds the new call number to the Call Register file.

(2) Select the Call Register icon to view all call numbers associated to a selected contract.

(a) CLIN detail information is provided for each call selected within the window. Select the Call Detail icon to perform updates to open contract calls. Entering the document number closes the call for services performed.

(b) When calls are complete, select the Receipts icon to generate the DD Form 250, Material Inspection and Receiving Report, required for financial auditability. Enter the actual quantity (services performed based on CLIN information) received and the date performed. Select Save to update the call register and generate the DD Form 250. Select the number of copies needed during printing.

q. Transportation. This option provides Out-shipment and In-shipment search screens from the Distribution and Transportation Module. The search allows users to track all or selected shipments and send advance shipment notices to gaining bases. EM users can process transactions to another DHA Component and DLA Disposition Services. While processing transactions to another DHA Component or DLA Disposition Services shipments requiring transportation, it is imperative that users select Transportation Required to the right of the Use Form Number dropdown on the Equipment Loss screen as this allows the request to be tracked within the Distribution and Transportation Module (Figure 20).

The screenshot shows the 'Equipment Loss' window. The 'Loss Information' section includes fields for Organization (459 AMDS ANDREWS AFB-NAF), Transaction Reason (EQUIPMENT INVENTORY ADJUSTMENT LOSS), Use Form No. (DD FORM 1149), Receiving Agency (DD FORM 1348-1A), Remarks (MANUAL), and a checkbox for Transportation Required. Below this is the 'Ship To' section with fields for RIC and DODAAC/Org Name. The 'ECN List' section contains a table with the following data:

| ECN | Item ID | Nomenclature | Cust |
|--------|---------------|-----------------------------------|----------|
| 034829 | 6515015161519 | DEFIBRILLATOR/PACEMAKER, EXTERNAL | 459 AMDS |
| 034830 | 6515015161519 | DEFIBRILLATOR/PACEMAKER, EXTERNAL | 459 AMDS |

At the bottom of the window are 'OK' and 'Cancel' buttons.

Figure 20. Equipment Maintenance Excess Window

r. Equipment Reports. DMLSS provides a variety of standard reports and inquiries to help managers. Access the Reports module to view the available reports. Refer to the future DHA-TM DMLSS Volume 10, DMLSS Reports for further instruction. The difference between a report and an inquiry is defined below.

(1) A report is a collection of data presented automatically on a periodic or event driven basis. Reports represent the status at that point in time and/or present data of a historical nature. The data is presented in a standardized format and cannot be manipulated. Reports are not available if the Report Date field is not populated.

(2) An inquiry (Standard Inquiry) is similar to a report in that the inquiry presents data in a standard preprogrammed format. Inquiries are not produced automatically on a periodic schedule. Instead, inquiries are produced only when users request the information.

(3) Select an inquiry and select the View icon on the toolbar to review an inquiry. Most inquiries require criteria to be entered before the report is viewable. While in the inquiry preview window, the option of printing or saving the inquiry to file is present.

s. Transaction History. Transaction History provides an auditable record of transactions, such as gains, losses, or custodian changes that affect the accountable equipment inventory. DMLSS assigns a document number and creates a Transaction History record every time a transaction affects the quantity or dollar value of assets in inventory, the identification of assets in inventory, or the custodial responsibility of assets in inventory.

(1) Transaction History is used to verify that equipment transactions have been processed properly and determine the necessary corrective actions when an error has been identified. Equipment gain and loss transactions can be reversed from EM Transaction History when it is determined erroneous processing occurred. Reversing a transaction processes all required actions in reverse order of original transaction process.

(2) To access the Equipment Transaction History Search window, select the Navigate menu, then select Transaction History. In the Equipment Transaction History Search window, type or select the required search criteria and then select Search. The Equipment Transaction History Details window displays the search results.

(3) A multitude of search criteria is available for conducting searches. To narrow the search results, search for specific information. This also minimizes the impact on server speed and processing.

t. DMLSS Equipment Depreciation. Depreciation is the gradual reduction of an asset's value and is tied to the life of the asset. DMLSS calculates depreciation on all equipment with acquisition cost of 250,000 dollars or more and reports these values to Defense Finance and Accounting Service. Note: Prior to October 2013, depreciation was applied to equipment with a cost of 100,000 dollars or more. In April 2014, a DMLSS upgrade was released that effectively changed the dollar figure in EM. At that point, anything gained after 1 October 2013 and before 1 April 2014 went on the depreciation report and subsequently reported depreciation for those months, then dropped off in April 2014.

(1) Depreciation in DMLSS is calculated during the EOM process.

(a) DMLSS calculates the current month's depreciation based on the five-year straight-line method of depreciation. For Army activities, depreciation is not calculated in the DMLSS application, instead, is calculated by the General Fund Enterprise Business System.

(b) The exception to this is during the first month the depreciation is calculated. When the accumulated depreciation is equal to zero and the acquisition date is prior to the current month, the depreciation is calculated as the acquisition cost divided by 60 times the age of the equipment in months.

(2) The following fields in the EM application affect the depreciation calculation:

(a) In order for DMLSS to calculate depreciation, the Accounting Status field must be populated as In-Service.

(b) When the acquisition date is blank, DMLSS generates a pending action message, Blank Acquisition date in Capital Equipment record in the inbox. Enter an acquisition date for the item. Once this date is entered, DMLSS calculates the depreciation correctly.

(c) Changes to the acquisition date. Changes to the acquisition date do not adjust any previous DMLSS calculations that were reported; however, it does change future calculations. Caution: depreciation starts from the original date that depreciation was first calculated. Changes to an acquisition date may give the appearance that DMLSS took longer than 60 months to report the depreciation of the item even though all items should be fully depreciated in 60 months from the original acquisition date.

u. EM Utilities. The following information applies to EM Utilities.

(1) The EM inbox is slightly different than the inbox in other DMLSS modules, however, it serves the same purpose. When EM is accessed, the inbox opens automatically when pending actions or advisory notices exist. The inbox can also be accessed by selecting Utilities from the menu bar and selecting Inbox.

(a) Users must review and take action on items in the inbox daily to ensure proper management of all equipment related issues. Users can access processes or reports by selecting the action or advisory item and double-clicking the report under the product heading. Make changes as required and save actions to complete the process, and print any required reports as needed. When processes are completed, close the window to return to the inbox. The inbox can be closed or left open while in the EM module.

(b) The Advisory panel displays pending action messages that do not require any action by the user. These may be deleted after review. However, some pending actions come back every day until resolved (e.g., EM Excess Troubled Ship). Delete these manually.

(c) The Action Required panel displays pending action messages that require some action by the user. This section does not have a Delete button. Once required action is completed, the record no longer appears.

(2) Within EM Utilities there is the option to utilize HHT. With an HHT, users may scan bar code labels on the equipment, store the inventory, and systematically reconcile the inventory. The HHT may be used in Batch mode or in the interactive RF mode, and users can switch between modes during inventory. In Batch mode, download or upload information between the HHT and a computer using a docking port.

(a) Use the transfer to HHT option to download a batch inventory from the computer to the HHT.

(b) Use the Transfer from HHT option to download a batch inventory from the HHT to the computer. The HHT must be attached to the computer, a functioning ActiveSync, e.g., Windows Mobile Device Center, and be in its cradle (because the file transfer is not using wireless mode) to transfer files in batch mode.

(c) The HHT Model Type function identifies the type of HHT being used by the DHA Component. The standard HHT option selected is the Personal Digital Assistant (PDA).

2. EQUIPMENT MAINTENANCE (MA)

a. Purpose. The MA application is a CAIM SOS managed account that provides users with a systematic approach to MA. It allows customers with appropriate privileges the ability to request maintenance services and obtain status on work requested. The work order system provides scheduled maintenance procedures and facilitates historical maintenance data collection. The parts module interfaces to the supporting supply activity and the work order system. The historical maintenance data is used to support total lifecycle management of equipment.

(1) For privileged users, the Inbox automatically opens upon accessing the MA application from the DMLSS System Navigation window. It can also be viewed by selecting Inbox from the Utilities menu. A detailed list of MA pending actions and their recommended use is available in Enclosure 5.

(2) The main window also appears once the application is launched from the DMLSS Navigation window. In this window, users can access the modules and functionalities mainly through the navigation menu options. In some cases, the buttons on the horizontal toolbar at the top of the window can also be used to open module windows.

(3) The MA modules covered in this chapter are in the same order as they appear in the Navigate and Utilities dropdown menus located on the menu toolbar.

b. Repair Parts. Managing a repair parts inventory relates to the acquisition, receipt, storage, and issue of repair parts used in equipment maintenance. It also involves updating repair part inventory, equipment records, and work order records with parts used in the maintenance processes.

(1) Repair parts are not carried on operating inventory that are stored in the MEDLOG warehouse; instead, they are issued to the sustainment/maintenance activity upon receipt within the facility.

(2) A repair part inventory record is actually a combination of the MTF Catalog record, the Customer Catalog record, and the Item Location record. In order for a repair part to be purchased, a catalog record and an SOS must be established. These records are built within the CAIM module. A CAIM icon is located on the Repair Part Search Results screen and the Repair Part Detail screen to accommodate transition to the CAIM module.

(3) Once the Repair Part Inventory records have been established, the process for ordering repair parts is included in the CAIM process for Build/Process/Submit Replenishment Orders. The replenishment inventory process triggers the requirement to build and process orders. In the Repair Parts Inventory system, requirements are identified during the issue of parts to work orders and during the establishment of new inventory records. Use the offline replenishment process to generate an emergency order for repair parts. In this process the user can manually input the requirement and initiate the order process.

(4) The Repair Part Issue screen provides the capability to issue repair parts to a work order or a customer account and to record a part requirement against a work order. This screen is displayed when the user selects the Issue icon on the Repair Part Detail screen or when the user selects Repair Part Issue from the Navigation menu.

(5) The Repair Parts module consists of three functions: Open Part, Part Requirement List, and Part Issue. These three functions are accessed from the Navigate menu's Repair Parts option. The Open Parts function can also be accessed by selecting the Parts icon on the horizontal toolbar.

(6) Accessing the Repair Parts module initially opens the Search window. The scope default is set to search for active records. Enter additional parts or equipment criteria in the search screen to narrow the results.

(a) The search results are displayed in the window. The user must then highlight the record that is to be reviewed and then select the Detail button to review the Record Detail. If only one record is found, the Record Detail is automatically displayed.

(b) The Repair Part Detail window is divided into four tabs: Part Info, Pipeline Consumption, Equipment Info, and Note.

(c) The Part Info tab allows the user to view Repair Part Details and add to or edit the record as needed. Frequently used parts should be classified as stocked with a corresponding level and reorder point.

(d) From the Equipment Info tab, users can add or delete an equipment association to a repair part. Select the Add button and enter a manufacturer, common model, and the nomenclature to establish the association. Select the Delete button to delete an association.

Establishing these relationships is highly recommended during the parts ordering process. The link between parts and equipment helps managers identify and manage on-hand inventory and assists with assigning parts to work orders related to that equipment nomenclature.

(e) The Notes tab allows users to enter unique information about the part or any issue associated with the part. This information serves as historical background for future requirements. Use the Delete button to remove outdated or obsolete notes.

(7) The vertical toolbar contains icons that allow users to perform multiple tasks within the Repair Parts Detail module. Standard icons include Find, Save, Revert, Delete, Close, and Help Topics. The remaining icons link to other modules or applications to perform specific functions.

(a) The Issue icon is a shortcut to the Part Issue module and allows users to process an issue or reserve spare parts against an open work order. Parts information displays the on-hand quantities and available quantities. Reserved quantities are deducted from the quantity available and applied against the respective work order.

(b) The Inventory Adjustment Icon is a shortcut to the Inventory Adjustment module and allows a user to process a gain or loss against the Repair Parts Detail record. The on-hand and available quantity are either increased or decreased depending on what type of inventory adjustment is processed. Processing of an inventory adjustment generates a “RPG” or “RPL” transaction. Both transactions are written to Transaction History found in the IM application.

(c) The CAIM icon is a shortcut to the CAIM application and automatically opens the Maintenance Activity CAIM Customer Inbox. The shortcut is designed to allow the sustainment/maintenance activity access to ordering capabilities for spare part replacement without having to open and close other modules and applications.

(8) The Parts Requirements List window displays all part requirements associated to open work orders in Item ID sequence. From the Navigate menu, select Repair Parts and select Parts Requirement List. Work orders awaiting this part are also displayed in the window.

(a) Parts may be issued when there is an on-hand quantity in bench stock and the required quantity does not exceed the on-hand balance. If parts are available for issue, enter an issue quantity. The Issue icon is not available when the on-hand quantity is zero. Details of the repair part may be accessed by selecting a part and selecting the Detail icon.

(b) For those listed requirements that do not have an on-hand balance, select the part and select the Detail icon from the toolbar to open the Repair Parts Detail window. From this window, establish or increase a requirement or reserve the repair part. Do not increase the total amount ordered to stock extra parts for a work order from this screen. Instead, use the CAIM Build Process Submit. Increases in the Repair Parts Detail window are tied to the work order and all items received are applied to the specific ECN Historical Maintenance Report/Maintenance costs.

(c) The Parts Ordering function can also be accessed by selecting the CAIM icon within the Parts Detail record. The Maintenance Activity Service Center is opened when this option is selected. Follow CAIM ordering procedures to order spare parts.

(9) The Repair Part Issue screen provides the capability to issue repair parts to a work order or to a customer, and it has the capability to record a part requirement against a work order. This screen is displayed when the Issue icon on the Repair Part Detail screen is selected, or when the Repair Part Issue is selected from the Navigate menu. First, enter the Item ID of the required part. The Search Results window displays work orders awaiting the part. Enter the reserve quantity and issue information if a part is needed to satisfy a work order requirement. Enter an issue quantity if the part is available for issue. If parts are not available for issue, enter the required quantity in the quantity requirement field.

c. Work Orders. The Work Order Management function plays a vital role in the overall success of the maintenance mission. The Work Order Management function allows the user to generate, create, update, track, and complete work orders. Multiple MAs can be created for a single DHA Component.

(1) This section includes a general overview of the Work Order Management function and discusses the following topics in detail:

- (a) Locating Work Orders.
- (b) Work Order Registers.
- (c) Work Order Detail Records.
- (d) Printing Work Orders.

(2) Once created, scheduled and unscheduled work orders follow the same chain of events that are listed below:

- (a) Maintenance manager or team leader assigns the work order to a technician.

Note: Assigning work orders to a technician is important to the data collection process used in other modules and reports.

- (b) Technician updates work order.

(c) Technician completes work order upon completion of service or repair. When completing a repair work order, the failure reason will be based upon the following criteria:

1. No Problem Found are MDE sent for repair by clinical users that are found to be operating as intended. This data can be useful in helping to identify educational opportunities for specific MDE.

2. Operator Error and Operator Abuse are MDE sent for repair by clinical users

that are caused by the user. The error may have been due to operator abuse, poor user maintenance, accidental damage, untrained operator, or used with clinical standing operating procedures that promoted incorrect usage. MDE damage caused by operator error or abuse will be reported directly to the HTM Manager and Accountable Property Officer for Financial Liability Investigations of Property Loss consideration

3. Normal Wear and Tear are MDE sent for repair by clinical users that are caused as a result of normal wear or aging which causes the MDE to not operate properly. Normal wear and aging are expected to occur even if with proper use and maintenance.

4. Software Error are MDE sent for repair by clinical users and are caused by MDE's software not allowing it to perform its required function(s) or according to specifications.

5. Manufacturing Defects are MDE that were improperly manufactured or were properly manufactured but have an unreasonably dangerous design that could result in injury. Manufacturing Defects MDE identified during a Food and Drug Administration recall or identified by medical materiel quality control message. Patient incident (sentinel event) investigation could also initiate a Manufacture Defect result.

6. Inappropriate Environment are MDE that were sent for repair by clinical users due to inappropriate conditions (e.g., power failure) and environment (e.g., area with high humidity, outdoors).

(d) Ensure maintenance assessments are conducted when completing an unscheduled work order based on the following criteria:

1. Excellent maintenance assessments are MDE that looks new, is in excellent functional like new condition, and functions at documented performance specification.

2. Good maintenance assessments are MDE with a lightly used condition, only minor (if any) wear and tear, and functions at documented performance specification.

3. Fair maintenance assessments are MDE in a used condition, has evidence of wear and tear, functions at documented performance specification.

4. Poor maintenance assessments are MDE with heavily used condition, evidence of excessive wear and tear, excessive maintenance, and functions at documented performance specification. Note: Poor maintenance assessments must have disposition determined by the HTM Manager, customer, and resource officer.

5. No Longer Supportable maintenance assessments are MDE that have received discontinuation or end of life notifications from the manufacturer which indicate that repair parts and service will no longer be available.

(e) Maintenance manager or team lead reviews work order for accuracy.

(f) Work order is retained for historical purposes.

(4) During the EOM processing, DMLSS generates scheduled work orders for all equipment items that have scheduled maintenance service due dates in the next month.

(a) Scheduled work orders can be manually initiated, suspended, or reactivated before EOM processing. The suspend process disables generation of scheduled work orders on equipment that is in mobilization status. Scheduled maintenance can be reactivated once the equipment is returned from mobilization.

(b) Unscheduled work orders can be created as necessary using either the ECN or for non-ECN controlled items (including items that are not on the accountable property system of record of the DHA Component), organization, nomenclature, and customer name.

(c) DMLSS assigns a unique sequential number to all work orders whether scheduled or unscheduled. This work order number is formatted as follows: YYYYMMDDxxxx; where YYYYMMDD is the creation date and xxxx is a serial number that is reset to 0001 each day.

(d) Work orders may be assigned to teams and/or to individual technicians. Work orders can be assigned from the open work order register or within the work order detail screen. The assignment process depends on the size of the maintenance staff and the requirements at the DHA Component.

(5) A work order may be updated or completed only after it is assigned to a technician. Anyone with access and privileges to the work order file can update the record.

(a) The purpose of the update process is to ensure that work in progress is not lost. The work order record provides an avenue for documenting work accomplished by in-house maintenance technicians, contractors, and other agencies. Completion dates are also recorded.

(b) The Cancel Work Order process provides a means to cancel work order records from the database.

(c) From the Navigation menu, select the Open Work Module option to search for open work orders. Another option is to select the Find icon within the Work Order module. Either option accesses the search screen.

1. The search scope includes Open, Completed, or Inactive work orders. Within each scope, a search can be initiated using the ECN, work order number (or a range of work order numbers), completion date (or a range of completion dates), class (device class name), equipment nomenclature, equipment manufacturer, organization name, customer name, technician name, service type, work order category, work order priority, work order status text, team name, contractor name, other government agency, assemblage organization, assemblage description, assemblage number, work location, or ownership.

2. Once the search criteria are set, select Search to find potential matching work

orders. The search criteria can be modified by selecting Reset or can be cancelled by selecting Cancel. The Work Order Detail record is displayed if only one match is located. If multiple records are retrieved, they are displayed in the Work Order Register. Open work orders are displayed in the Open Work Order Register while completed and inactive work orders are displayed in the Completed Work Order Register. The search results include work orders for associated components when matched to an ECN which has System identified in the Equipment Type field of the Equipment Detail main tab.

(d) The Work Order Register is a list of either open, completed, or inactive work orders depending on the scope selected in the search screen.

1. The list can be filtered by one or more of the following when the register is too large: ECN, work order number (or a range of work order numbers), equipment nomenclature, organization name, work order category, work order priority text, service type, work order status, technician name, customer name, team name, contractor name, and/or other government agency.

2. The original Work Order Register list can be retrieved by selecting the Refresh button. Selecting the Reset option clears previously set filter criteria.

3. The Work Order Register is initially sorted by work order number in descending order. The user can apply other simple or complex sorts to the Work Order Register. A simple one-level sort is applied by selecting the column by which the register is to be sorted. The user can apply a complex sort by selecting Sort on the vertical toolbar or by right-clicking on the register and choosing Advanced Sort. Then, in the Sort window the user can specify the different sort levels.

4. The Work Order Detail record is displayed when only one record is located. If multiple records are located, the Work Order Register displays all matches found. The detailed work order records can be accessed by selecting one or more records and selecting the Detail icon or by double-clicking a single record.

a. The Work Order Detail record consists of the following screens: Work Order Main, Work by Technician, Work by Other, Parts, Estimate, Required Materials, Attachments, Assemblage, and Status Summary.

b. The work order number, ECN, nomenclature, organization name, and customer name are also identified within each detail record.

5. The Main Screen of the work order is designed to provide information on the item requiring maintenance, the type of service required, who is to do the service, and the current status. The service type, work order priority, work order status, work location, request time, person requesting, and service requested are marked as mandatory entries.

a. The Contract and Warranty Indicators are enabled when the equipment is under contract or warranty, respectively.

b. When the work order contains an ECN, the Work Order Main screen contains icons for the user to access the corresponding equipment record, maintenance procedure, or task checklist. When the work order contains a contractor name, the Work Order Main screen also contains icons for the user to access the Contract Services module.

6. The Work by Technician screen provides a place for the technicians assigned to the sustainment/maintenance activity to record their work and update information in the work order. The data in this screen is also used for maintenance management and productivity reports. The Work by Technician screen contains the following information for each technician who performs service on the work order: technician name, work order category, service type, service action, service item, service result, date serviced, service time, labor rate, and labor cost. DMLSS calculates labor cost using the service times entered on the work order and the labor rate entered in the MA Detail record. DMLSS also calculates and displays total hours, technician, and total labor cost from the data entered. This screen also contains the failure reason (if applicable), maintenance assessment, supply condition code, accumulated down time, actual response time, work order status, and work order notes.

7. The Work by Other screen provides a means to record work performed by contractors or other government agencies. The service type, date serviced, and service time are mandatory entries.

8. The Parts screen provides a means to record parts required to complete a work order and to record parts used on a work order.

a. The screen is divided into two sections: parts that are included in the MA catalog and parts not included in the inventory. The cataloged parts section uses data from Repair Part Inventory records and is integrated with the Repair Part Inventory module.

b. The non-cataloged parts section allows the user to record information about parts used that are not on inventory records and parts provided by other maintenance activities. DMLSS calculates and displays the total parts cost for all cataloged and non-cataloged parts.

9. The Estimate screen provides a place to record a cost estimate for repairing a piece of equipment. The data fields in this window are updated once all estimates are entered and saved. Maintenance personnel should review these details and determine whether or not it is economically feasible to have the equipment repaired. This screen also contains the non-cataloged parts needed to complete the work order, including description, cost, quantity, and extended cost.

10. The Required Materials screen identifies the items required to complete a work order by providing information from the equipment record and the Procedure module. The intent is for the technician to save time by gathering all the items prior to starting the work.

11. The BMET can attach any supporting documentation for the work order using the Attachment tab.

12. The Assemblage tab provides information to locate stored WRM equipment.

13. The Status Summary screen provides a brief management summary on the history of the work order. Updates to the work order status are recorded and the work order transaction date defaults to the system date and time. The username is defaulted to the User ID of the technician editing the work order or to system for system initiated changes.

(6) The Request Scheduled Work Orders menu (Figure 21) allows the user to create the next month's scheduled work orders. This function allows for retrieval of work orders prior to the scheduled EOM process.

Figure 21. Request Scheduled Work Orders

(a) To retrieve scheduled work orders, select the Navigate menu, Work Orders, then Request Scheduled Work Orders.

(b) Scheduled work orders can be retrieved immediately by selecting the Process On-Line option. Selecting the Process in Batch option generates the scheduled work orders during the end-of-day process. Then, enter the appropriate selection criteria to retrieve the desired work orders. The process is completed by selecting Create Work Orders and selecting OK in response to the confirmation message.

(c) Individual or multiple records may be printed from the Work Order Register (Figure 22). If necessary, multiple copies of a work order may also be printed. Additionally, one or more copies of a Work Order Detail record can be printed from the Work Order Detail window.

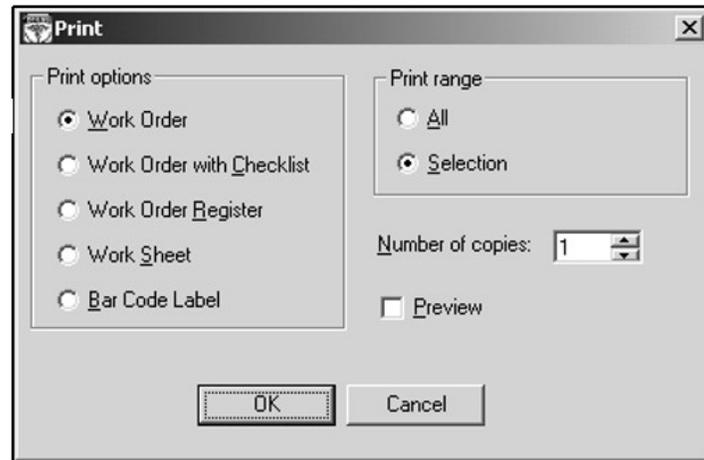


Figure 22. Print Requested Work Orders

d. Contracts. Use the Contract Search window to search for service contracts. To access this menu, select the Navigate menu and then Contracts to open the Contract Record Search screen. If no search criterion is entered, all service contracts are retrieved. The search criteria may be utilized to narrow the results and locate the desired record. Highlight a record and select the Detail icon to view details of a service contract. Details may be printed by selecting the Print option.

e. Equipment Classification. The Equipment Classification function supports both EM and MA requirements. It supports the requirement to manage medical equipment based on a medical-legal risk assessment.

(1) The Equipment Classification involves establishment of centralized tables containing the following information:

- (a) An equipment classification and nomenclature system.
- (b) Standardized management guidance by type of equipment.
- (c) Default data by type of equipment.

(2) Centrally managed classification tables were created as a Tri-Service project. The centrally managed records cannot be edited at the local DHA Component. Classification records may be added to meet local requirements through a request to the DHA Global Service Center help desk at 1-800-600-9332 or dhagsc@mail.mil.

(3) The Equipment Classification and Nomenclature System includes:

(a) The Standard Equipment Nomenclature (Device) and Device Code for Each Specific Type of Device is based on ECRI's Universal Medical Device Code number and Universal Medical Device Nomenclature System.

(b) The device classes associate the individual devices into groups that perform similar functions. For example, there are several types of infusion devices: Ambulatory Infusion Pump, General Purpose Infusion Pump, Warming/High Flow, Micro Infusion Pump, Multichannel Infusion Pump, and Syringe Infusion Pump. Each of these has a separate device code and equipment nomenclature, but all of them are associated with the device class of Infusion Pumps. This is used primarily to facilitate queries of equipment records for the purpose of easily retrieving multiple like items. This functionality helps the user address command level requests and aids in recall or hazard alert management.

(c) The Manufacturer item lists the name and contact information of the manufacturer for a certain equipment item.

(d) The Manufacturer / Common Model lists the name of the manufacturer of an equipment item and the name by which the equipment is commonly referred to.

(4) The EM Data for each item includes:

(a) A risk level that is centrally managed and is used as the basis for establishing EM requirements and maintenance intervals. Risk levels are provided to the local EM for informational purposes.

(b) A Federal Supply Class that identifies the supply class in which the asset is classified.

(c) The Life Expectancy indicator is used to conduct a technical assessment of the MDE. The indicator is used to answer questions like the following: Is the device (software and parts) supportable? Does the device still meet clinical requirements?

(d) The specialty code that is used to associate the type of device to a major medical specialty or section of the DHA Component where the equipment is primarily used.

(e) A Maintenance Required Indicator which identifies devices that require periodic maintenance and/or are considered to have significant risks that justify keeping an individual historical service record. ECN's created by maintenance using the Maintenance Record commodity classes should have a maintenance required indicator of "Y" and an accountable equipment indicator of "N." Note: This determines if a record is searchable in the MA module.

(f) An accountable Equipment Code, which indicates whether or not the item is to be included on accountable records. Note: This determines if a record is searchable in the MA module.

(5) For New Device, refer to Device Code section above.

(6) To establish a new device class, select the Navigate menu, then select Equipment Classification, and select New Device Class. Enter the device class name and select the Save icon. Upon saving, DMLSS creates a unique Device Class Code and defaults the date to the

current date.

(7) To establish a new manufacturer, select Equipment Classification from the Navigate menu and select Open Manufacturer.

(a) The Open Manufacturer window opens and is divided into four tabs: Manufacturer, Sales POC, Parts POC, and Service POC. Note: This field is not related to the SOS or manufacturer field in the catalog record.

(b) The Manufacturer tab is similar to an address book allowing the user to enter names, addresses, phone numbers, email addresses, faxes, ECRIs, and Commercial and Government Entity Code codes. A previously known manufacturer and/or division's name may also be documented in this tab. This is helpful when vendors change company names, are bought out by a larger corporation, or when a new division is established within a company.

(c) The remaining tabs become accessible once information is loaded and saved in the Manufacturer tab. It is highly recommended to enter and save as much POC information as possible. Documenting this information reduces future research time.

(d) Common Model (a manufacturer-assigned model that is normally referred to in discussion) Note: DMLSS does not provide any Centrally Managed Common Model information. All Common Model data is created at the local DHA Component.

(8) Refer to current DHA policy for current guidance regarding use of the New Common Model function. To establish a new Common Model, select Equipment Classification and select New Common Model from the Navigate menu. From the New Common Model window, enter the manufacturer, nomenclature, and common model. Dropdown menus are available for manufacturer and nomenclature information.

(9) Product literature information may be included in the Common Model Detail record. Product literature is entered by title, storage location, and medium type.

(10) To view an existing device, select Equipment Classification and select Open Device from the Navigate menu. Another option is to select the Device icon on the horizontal toolbar to view the Device Search criteria window. The Device Search window allows users to perform searches using one or more of the following: device code, equipment nomenclature, device class, FSC, and specialty. The Device Detail record is displayed when only one match is retrieved, or DMLSS displays a list of all matching records.

(11) To view an existing device class, select Equipment Classification and select Open Device Class from the Navigate menu. The Device Class search window allows users to perform searches using one or more of the following: device class code, device class name, and date. The Device Class detail record is displayed if only one matching record is retrieved. Otherwise, the system displays all matching records. Detail information can be accessed by selecting the appropriate device class detail.

(12) To view an existing manufacturer from the Navigate menu, select Equipment Classification and select Open Manufacturer.

(a) Within the Manufacturer Search window, users can search by manufacturer's name, or a list of manufacturers can be displayed by selecting Search from the vertical toolbar. Select the Detail button to view the Manufacturer's detail information. Within the detail window, a manufacturer is either coded as centrally or locally managed. Centrally managed manufacturer records cannot be modified; however, local POC information can be added to centrally managed records.

(b) An existing locally created manufacturer may be marked for deletion when the manufacturer is no longer in business or has changed names. Select the Locally Created Manufacturer Details from the search window then select the Delete icon from the vertical toolbar. Upon saving, the name is coded for deletion and is no longer accessible.

(c) Manufacturers occasionally have names that change. Utilize the Previously Known As field within the Manufacturer tab to associate the old and new names.

(d) An existing delete indicator can be removed from a manufacturer's record. This is accomplished by accessing their detail record and selecting the Undelete button from the vertical toolbar. Upon saving, the delete indicator is removed and the manufacturer detail record becomes accessible. It is highly recommended to validate the detail and POC information at this time.

(13) To view an existing common model, from the Navigate menu select Equipment Classification and select Open Common Model.

(a) From the search window, the user must select a manufacturer, at a minimum, to search. After a manufacturer is selected, the search can be narrowed to nomenclature and common model. The Common Model Item Detail record appears when only one matching record is retrieved. Otherwise, DMLSS displays a list of all matching records retrieved. Utilize the Detail button to view desired detail information.

(b) Product literature can be added or deleted at any time. Select the item to be deleted and select the Delete button.

(c) Common Model Detail records can be marked for deletion. Access the Common Model Detail window and select the Delete icon on the vertical toolbar to mark a record for deletion. If a record is already marked for deletion, an Undelete icon is visible in the Common Model Detail record. Select the Undelete button to remove the delete indicator from a detail record. Note: When a Common Model record is deleted, it is only marked for deletion. The record remains in the system and continues to support any records associated with it, however, it is no longer available for use in new records.

f. Maintenance Plan. The Maintenance Plan module provides a method to establish guidance on the type of scheduled maintenance services and the scheduled maintenance intervals

for each type of device that has a maintenance requirement.

(1) Maintenance plans may be established centrally or locally at three different levels:

- (a) Equipment nomenclature.
- (b) Equipment nomenclature, manufacturer, and common model.
- (c) Equipment control number.

(2) Equipment records meeting the criteria of an established maintenance plan should be associated to that plan. Once the association is accomplished, the system applies the appropriate maintenance intervals to the equipment.

(3) Maintenance plans are used to identify maintenance responsibility and the agency or level of maintenance support required for each device (e.g., depot maintenance, organizational, or calibration laboratory). A maintenance plan can be associated with a procedure number in order to identify the default maintenance procedure used while completing work orders.

(4) The maintenance intervals within each maintenance plan identify the number of months between scheduled maintenance. Each device that has a Maintenance Requirement Indicator of “Y” should be associated to a maintenance plan so the system can generate scheduled work orders. The four different types of scheduled work orders are:

- (a) Inspection (code “INSP”).
- (b) Preventive Maintenance (code “PM”).
- (c) Calibration (code “CAL”).
- (d) Scheduled Parts Replacement (code “SPR”).

(5) Different maintenance intervals are established for the different operational statuses in which the device can be used:

- (a) In-Use.
- (b) Mobility (assets subject to short-term deployment).
- (c) Stored.

(6) To create a new MA plan in DMLSS, from the Navigate menu, select Maintenance Plan and select New Plan. Another option is to select the Maintenance Plan icon from the horizontal toolbar and select New in the Search window to open the Maintenance Plan Detail.

- (a) Complete all required information and select Save. Note: New maintenance

plans require management decisions to determine whether a central plan is non-existent or too lenient, and new maintenance plans will require prior approval with DHA MEDLOG HTM.

(b) Select the equipment nomenclature from the dropdown menu. Utilize the Jump To button to create a new nomenclature if necessary. The equipment nomenclature establishes the associated device code, device class name, device class code, risk level, life expectancy, and specialty.

(c) Enter the maintenance responsibility. This field identifies the agency or organizational level responsible for performing maintenance.

(d) Enter the manufacturer's recommendation for maintenance intervals, as needed, for the following scheduled maintenance types: Inspection, Preventive Maintenance, Calibration, and Scheduled Parts Replacement. These intervals may be modified based on the equipment's intended purpose, meaning, or the operational status (in-use, mobility, stored). Operational status may dictate different intervals. DHA MEDLOG HTM can provide additional assistance with determining scheduled maintenance intervals if necessary.

(e) The manufacturer's name, common model, and procedure number may also be updated in this window. The level of scheduled maintenance may dictate whether or not these fields need to be used.

(7) To open an existing maintenance plan, from the Navigate menu, select Maintenance Plan and select Open Plan or select the Maintenance Plan icon from the horizontal toolbar.

(a) A search can be conducted using the following criteria: device class name, equipment nomenclature, manufacturer name, common model, ECN, or any combination of fields. Leave all search fields blank and select the Search button to view all maintenance plans.

(b) Highlight a record and select the Detail button to view and/or revise a maintenance plan. Locally managed maintenance plans can be updated but centrally managed maintenance plans are not editable.

(8) The View Plan Central option allows users to view a report of all centrally managed maintenance plans by equipment nomenclature. The information contained on this list is similar to information contained in the on-screen maintenance plan view.

(a) In addition to equipment nomenclature, the following data is also displayed: risk levels, maintenance responsibility, maintenance requirement indicator, procedure number, and maintenance intervals for in-use, mobility, and stored assets. Select the Print icon on the vertical toolbar to print the entire list or individual pages.

(b) The View Plan Consolidated option displays records by maintenance intervals and equipment nomenclature sequence. The information contained on this list is similar to information contained in the on-screen maintenance plan view. In addition to the equipment nomenclature, the manufacturer's name, common model, ECN, and procedure number are

displayed. The centrally managed indicator is also visible. Separate Navigate options are available to access the consolidated maintenance plan list for in-use, mobility, and stored assets.

g. Personnel Management. The Personnel Management module is used to establish records for all maintenance personnel, assign maintenance personnel to maintenance teams, document the training experiences and professional certifications of personnel, record the time that personnel are available for work each month, and provide a gross breakout of how the time was spent.

(1) Staff records are established when individuals arrive for duty at a sustainment/maintenance activity. The staff record will be inactivated upon departure. Maintenance personnel can be assigned to work orders once the staff record is established and a DMLSS login has been established.

(2) Certification and training records can be added for each individual in the sustainment/maintenance activity. This information is used to document the professional certifications and training of the personnel and aids the supervisor in making work assignments as well as determining if the individual requires additional training. Master certification and training records are maintained so they can be linked to additional staff members without duplicating the information in each individual staff record. This DMLSS function is not intended to replace or supersede any official training records or documentation.

(3) The staff member's timesheet information will be entered at the end of each month. DMLSS uses this data to process performance information about individual staff members. DMLSS also combines data from multiple staff members to process information about teams and the overall sustainment/maintenance activity.

(4) The monthly timesheet provides a method to record the time each person was available for work during the month. The timesheet provides a gross breakout of how time was spent and provides a basis for productivity analysis reports. The Medical Expense and Performance Reporting System data is derived from the hours entered into completed work orders and is summed for each customer account.

(5) To add a new staff member, select Personnel Management from the Navigate menu. Select New Staff and the Staff Detail window opens. This window is divided into four tabs: General, Certification, Training and Notes. Complete all required information in the General Tab and any additional information for the staff member to supplement the staff member's profile.

(a) Use the General tab to load general information about the new staff member. Mandatory fields are name, rank, job class, and date of arrival. If possible, Optional fields should be completed to provide a thorough description of the staff member and capabilities. The staff member can also be assigned to a maintenance team at this time.

(b) All awarded certifications should be documented in the Certification tab.

(c) Use the Training tab to document training maintenance personnel have received for particular equipment. Information is entered by device class name, nomenclature, manufacturer, and model number. Note: The equipment trained data associated to a training course is contained in a Null Data table and does not mean these equipment items are in the DHA Component inventory.

(d) The Notes tab is used as implied.

(6) The Master Training function allows HTM Activity managers to load specific requirements for approved courses such as military training courses, manufacturer, and contractor courses, and DHA Component and/or local training courses. The master training function is designed to eliminate duplicate efforts. Rather than adding the training information to each individual staff member's training record, one master training record can be assigned to multiple staff members. This information is used to document training of personnel assigned, assign work, and determine if any additional training is necessary.

(a) To load a course in the Master Training window, from the Navigate menu, select Personnel Management and select Master Training. Under Training Records, select the Add Course button and complete all required fields. Select the Add Course button to load additional courses.

(b) To remove obsolete courses, select the course from the training records list and select the Delete Course button. This action removes the course from the Master Training record and all staff members' records. It also disassociates all related equipment.

(c) Equipment records can be associated to a specific training course by selecting the course from the list of training records and selecting the Add Equipment button. The association is completed by loading the device class and equipment nomenclature. Multiple device classes and equipment nomenclatures can be loaded by selecting the Add Equipment button. Enter the manufacturer and model number if the training was focused on a specific make and model.

(d) To remove equipment from a course, select the device class and select the Delete Equipment button. The equipment identification is then removed from the Master Training Record and all members' records who received this training.

(e) Information to populate these fields is loaded in the Master Training Record module by an individual assigned the applicable roles and privileges.

(7) DMLSS allows Master certification records to be added for each individual in the MA. This information is used to document the professional certifications of assigned personnel, aid the supervisor in assigning work, and assist in determining if any additional training is needed for an individual.

(a) To add a certification record, select "Personnel Management" and select "Master Certification" from the Navigate menu. Select the Add Certification button and enter the certification description and issuing agency in the open fields. Select the Add Certification

button to load additional professional certifications.

(b) To remove obsolete certification records, select the obsolete record and select the Delete Certification button. The certification is then removed from the Master Certification List and from all members' records that had the certification.

(8) To access a list of all current staff, select Personnel Management and select Team/Staff from the Navigate menu. A list of all assigned maintenance personnel is displayed. The manufacturer can load new teams and assign personnel as local business practices dictate.

(a) To establish a maintenance team, select the Create Team button under the Teams view. Enter the name of the team that is to be established. Upon saving, the team becomes visible and accessible within the Team/Staff window.

1. To add members to a team, select the name from the Staff List and select the Assign icon from the vertical toolbar. Select the team from the dropdown list and select "OK." A staff member can also be assigned to a team by selecting the staff member name, and then dragging and dropping it over the team name.

2. To remove a member from a team, select the name from the staff list and select the Unassign icon located on the vertical toolbar. The staff member is then moved to the Unassigned team. Upon saving, unassigned staff members can be assigned to another existing team. A staff member can also be unassigned by selecting the staff member name, and then dragging and dropping it over the Unassigned team.

3. A team leader can be assigned to each team. To accomplish this, display the team members by selecting a team name. Select the person to be assigned as the team leader and select the Assign Team Leader button. Upon saving, a checkmark identifies the team leader. Repeat these actions to assign a new team leader. The staff member must be assigned to a team in order to be designated as the team leader.

4. To delete a team, highlight the team name and select the Delete Team button located on the vertical toolbar. All staff members assigned to that team are then moved to the Unassigned team and become available for reassignment. The team to be deleted cannot be in the equipment detail of any record or in an open work order for this function to be successful.

5. Staff members that are no longer assigned to the sustainment/maintenance activity will be removed from the active staff roster. To remove a staff member, open the Staff Detail record for the staff member and select the Inactive icon from the toolbar. The staff member information is then archived and may be viewed by selecting the View Inactive Staff radio button in the Team/Staff window.

6. If a staff member returns to the sustainment/maintenance activity, select the View Inactive Staff radio button and select the staff member from the list. Select the Staff Details button to view the staff member's detail record and select the Active icon from the toolbar. The staff member is then restored to the Unassigned team. It is advisable to revalidate

the staff member's credentials and training upon reactivation.

(b) A Staff Roster can be printed for all assigned staff members or for a selected team. This roster reflects rank, name, duty phone, home phone, beeper number, team, and date assigned.

(9) The monthly timesheet provides a method to record the time each person was available for work during the month. The timesheet provides a gross breakout of how the time was spent and provides a basis for Productivity Analysis Reports.

(a) Timesheet information should be entered at the end of each month. DMLSS uses this data to process performance information about individual staff members. DMLSS also combines data from multiple staff members to process information about teams and the overall Maintenance Activity.

(b) Each staff member should provide the following values of time, rounded to the nearest tenth of an hour:

1. Regular hours.
2. Overtime hours.
3. Non-duty absence.
4. Duty absence.
5. Administrative / Support hours.
6. Technical training hours.
7. Supervisory hours.
8. Travel hours.

(c) The following values are automatically calculated based on input:

1. Total hours = Regular hours + Overtime hours.
2. Hours available for work = Total hours - (Non-duty absence + Duty absence).
3. Hours available for maintenance = Hours available for work - (Administrative support hours + Technical training hours + Supervisory hours + Travel hours).
4. DMLSS also calculates all column totals.

(d) Timesheets are available by selecting Timesheets from Personnel Management

under the Navigate menu or by selecting the Timesheet icon while in the Team/Staff window.

(e) Monthly timesheets can be printed by using the Print icon. The printed report mimics the on-screen display.

h. Maintenance Procedures. The Procedures module provides a means to develop and distribute procedural guidance on scheduled maintenance services. Each procedure includes a list of tasks performed on a routine basis. It also includes appropriate safety precautions, test equipment, special tools, repair parts, miscellaneous supplies needed to perform the service, and descriptive text on how to perform the tasks.

(1) Centrally managed maintenance procedures are provided as part of the DMLSS system. The Add Like function in the Procedures module provides a means for a user at a local DHA Component to use a centrally developed procedure to create a customized procedure. The Add Like function copies most parts of the selected procedure and uses it as a starting point to establish a new procedure. A maintenance procedure contains detailed steps and guidance for maintenance services. It can be general enough to apply to several devices or specific enough to apply to a single ECN. When a work order is created for equipment that has an associated maintenance procedure, data from the procedure is entered on the Required Materials tab of the work order and a checklist is associated with the work order.

(2) To load a new procedure, from the Navigate menu, select Procedures and select New Procedure. Alternatively, select the Procedure icon on the toolbar and select the New button in the search criteria window. The following three tabs are available for updating when the procedure editor window opens: General Info, Associated Maintenance Plans, and Required Materials. The author of the new procedure defaults to the first name and last name from the POC record associated with the user's login ID.

(a) Enter a procedure title in the Procedure Editor window. The procedure title is tied to the equipment nomenclature and sub-nomenclature. It is also based on the manufacturer's maintenance recommendations and procedures.

(b) Enter the estimated required hours to complete Inspection, Preventive Maintenance, Calibration, and Scheduled Parts Replacement.

(c) Enter the scope of work to be performed. The scope provides a description of work to be performed, identifies all applicable devices, and defines the parameters of the procedures.

(d) Enter the precautions associated with the procedure. The precautions identify hazards and/or special precautions associated with performing the required maintenance.

(e) Enter any special training required by the servicing technician.

(f) The procedure and version numbers are included in the General Info tab if the procedure is being modified from an existing procedure.

(g) Update all maintenance plans associated with the new procedure in the Associated Maintenance Plans tab.

(h) Use the Required Materials tab to identify all spare parts requirements. They are categorized by cataloged or generic, test equipment and special tools required, and any miscellaneous supplies required for completion of necessary maintenance.

(i) The remaining tabs become accessible upon saving the information loaded to the General Info, Associated Maintenance Plans, and Required Materials tabs. Utilize the Inspection, Preventive Maintenance, Calibration, and Scheduled Parts Replacement, and acceptance to add task statements that include acceptable values and test points if required. Use task text to completely explain a requirement. A special text field is also available for unique characters required to explain a value or tolerance. The Acceptance tab lists acceptance criteria for inspection and Calibration items.

(j) All new procedures are considered draft procedures until the user selects the Final icon on the vertical toolbar.

(k) Locally established procedures can be marked for deletion by opening the procedure and selecting the Delete icon on the toolbar. The procedure is then removed from the database provided it has never been associated to a work order. Centrally managed procedures cannot be marked for deletion at the local level. Once marked for deletion, the indicator cannot be removed. The user has to create a new version of the procedure.

(l) These tabs represent the maintenance procedures to follow while working on an equipment item. To print a specific checklist or acceptance, select the Checklist icon on the toolbar. The tab view changes and only displays the general info, Inspection, Preventive Maintenance, Calibration, Scheduled Parts Replacement, and Acceptance tabs. Select the Print icon on the toolbar to obtain a hardcopy of these procedures.

(m) Use the Add Like icon to establish a new procedure. Selecting Add Like displays the original information contained in the General Info and Required Materials tab with the exception of Inspection, Preventive Maintenance, CALs, and Scheduled Parts Replacement hours. The procedure and version number of this new procedure is modeled after the existing information displayed in the General Info tab. Edit fields as necessary to complete the new procedure.

(n) Using the Associated Maintenance Plans tab, associate related maintenance plans to the new procedure. Include spare and generic parts requirements, misc. supplies, and update the test equipment/special tools fields under Required Materials. Select the Save icon to view the remaining procedure tabs.

(o) The Inspection, Preventive Maintenance, Calibration, Scheduled Parts Replacement, and Acceptance tabs populate with the original procedure requirements. Use the Add, Edit, Delete, or Copy buttons to modify specifications. Select the Final icon on the vertical toolbar to save changes and complete the process.

(3) To open an existing procedure, select the Procedures icon from the toolbar or select Navigate from the menu bar, select Procedures, and then select Open Procedures. A procedures search can be performed using the equipment nomenclature, equipment manufacturer, common model, ECN, procedure number, and/or procedure title. There is also an option to view only active records or all records on file.

(a) If a single record is retrieved, the Procedures Detail window automatically appears. A list of matches is displayed if multiple records are retrieved. Highlight the appropriate procedure number and select the Detail button to view the procedure contents.

(b) Use the Filter button to further narrow the search option. The Filter option allows users to enter additional search criteria. Multiple results are displayed in the search window.

(4) The Procedures View option, available from the Navigate menu, allows users to view and/or print the Scheduled Maintenance Procedure Library by Index, Test Equipment/Special Tools table, Miscellaneous Supplies table, or the Special Character table. These tables provide useful information on procedures and the available data to aid in creating locally developed procedures.

i. Schedules. The Workload Forecasting module aids the manager in establishing and maintaining an effective maintenance schedule and is an effective tool for identifying potential scheduling problems or adjustments to the maintenance schedule. It facilitates management of the scheduled workload by organization, customer, type of equipment, and whether the work is to be accomplished by various teams within the sustainment/maintenance activity or by outside agencies such as contractors.

(1) Throughout the course of a year, DMLSS generates a predictable quantity of scheduled maintenance work orders. The HTM Sustainment Manager establishes a pattern of how this workload schedule should be balanced. Many managers base the schedule on the organization, customer, location of the equipment, and/or type of device. Once a methodology is established, new items are added to the schedule as they are received.

(2) Establishing and maintaining a scheduling methodology is necessary for efficient use of personnel. The manager needs to review the schedule periodically to ensure the workload is distributed throughout the year and that the workload is balanced among the various teams within the maintenance activity. In addition, the maintenance manager needs to ensure the individual items of equipment are still scheduled appropriately. This involves summarizing and displaying the estimated times required for each scheduled maintenance service. The workload forecasting program provides this capability.

(3) The Workload Forecasting Reports can be used to evaluate the workload for each month and the distribution of work for the entire year. It allows the manager to identify potential scheduling problems and make the necessary adjustments to the maintenance schedule. The manager is able to access the information needed to redistribute the workload in order to achieve a balance that coincides with the staff availability or mission requirements. Workload Forecasting Reports also provide an indication of the overall structure of the scheduling logic

and shows the major customer areas that are scheduled each month. This is helpful in establishing a maintenance schedule for new equipment.

(4) The system allows maintenance managers to generate Detailed Workload Reports related to equipment items scheduled for periodic maintenance. The Detailed Report shows the individual equipment that is scheduled for service during each month of the following year. The Detailed Workload Report provides the details and the methods to correct workload distribution problems.

(a) To display the Detail Workload Request screen, select Navigate, Schedules, and then Detailed Workload Forecasting. The Detail Workload Request screen allows the user to enter search criteria used to produce a desired report. The user also dictates how the data is to be grouped and displayed.

(b) When the user enters the search criteria and selects Search, the system retrieves the records, prepares the report, and displays the Detail Scheduled Workload Report screen. The Detailed Scheduled Workload Report screen displays a truncated Equipment Nomenclature and Scheduling Factor and the services scheduled for the equipment during each of the next 12 months. The annual estimated hours for servicing the equipment are also displayed. The equipment is grouped according to the input criteria, and the number of hours required for each group is calculated and displayed.

(c) The user may reschedule the equipment services by moving them to another month on the display. When this is done, the system recalculates and displays the hours for the affected months. The schedules may also be changed by selecting an item of equipment and the Detail icon. The system then displays the Maintenance Data tab of the equipment record. In the Maintenance Data tab, the user can change the date due for each of the service types, change the scheduling factor, and change the team name. The maintenance plan for the equipment can also be accessed to see the service type and intervals associated with the equipment.

(d) DMLSS also displays the ECN and equipment nomenclature in the Micro-help area (lower left corner) of the screen when the user allows the mouse pointer to remain over an individual equipment item in the Detail Workload Request screen.

(5) The summary workload reports provide the summary information necessary to identify workload distribution problems. DMLSS allows users to generate Summary Workload Reports related to equipment items scheduled for periodic maintenance. The Summary Workload Report is used to evaluate the distribution of the scheduled maintenance workload with summarized data. By selecting the report using various criteria, the maintenance manager should be able to identify major workload distribution problems and determine appropriate solutions. The Detailed Workload Report provides the functionality to identify details related to the maintenance schedule and the means to balance the workload.

(a) To display the Summary Workload Request screen, select Navigate, then Schedules, then Summary Workload Forecasting. The Summary Workload Request screen provides a display that allows the user to enter search criteria used to produce a report and dictate

how the data is grouped and displayed.

(b) When the user enters the selection criteria and selects Search, the system retrieves the records, prepares the report, and displays the Summary Scheduled Workload Report screen. The program uses the scheduling data, date due, and intervals to determine what maintenance services are due during the next 12 months. The program then obtains the estimated service time and accumulates the amount of time currently scheduled for each time period. DMLSS displays the accumulated data on the Summary Scheduled Workload Report. The Summary Scheduled Workload Report has three tabs: Estimated Hours, Number of Work Orders, and Graphs.

(c) The Estimated Hours tab provides the number of estimated hours required for scheduled maintenance per month for the next 12 months. This data is grouped and summarized according to the selected criteria.

(d) The Number of Work Orders tab provides the number of work orders, which equals the number of equipment items scheduled for servicing per month for the next 12 months. The data on this tab is also grouped and summarized according to the selected criteria.

(e) The Graphs tab provides the capability to graph the data included in the Summary Scheduled Workload Report. The user has the option to use the estimated hours data or the number of work orders. The user may also select the type of graph, the months, and whether or not to use group or total data on the graph. The system displays the graph on the screen once the selections are made.

(f) The user may print the Summary Scheduled Workload Report and/or the graph. If the user selects the Print icon while in the Estimated Hours tab, the system produces the report displaying the estimated hours data. If the user selects the Print icon while in the Number of Work Orders tab, DMLSS produces the report displaying the number of work orders data. DMLSS prints the graph being displayed when the Print icon is selected.

(g) The Summary Scheduled Workload Report allows the maintenance manager to view the overall scheduled maintenance workload from several perspectives. The summary reports allow the manager to identify possible scheduling problems. By using the system in an iterative manner, the manager can investigate the possible problems in more detail and the impact of potential changes. The manager has two options for reducing the scope of identifying the scheduling problem and identifying possible solutions: Request an additional summary report with reduced selection criteria that is focused on the possible problem and request a Detailed Workload Report. The Detailed Scheduled Workload Report provides a means for the manager to view the individual equipment records and maintenance schedules that the summarized data represents.

j. Equipment Transaction History. Transaction History provides an auditable record of transactions such as, gains, losses, or custodian changes that affect the accountable equipment inventory. DMLSS assigns a document number and creates a Transaction History record every time a transaction affects the quantity or dollar value of assets in inventory, the identification of assets in inventory, or the custodial responsibility of assets in inventory.

(1) Transaction History is used to verify that equipment transactions have been processed properly and to determine potential corrective actions when an error has been identified. Equipment gain and loss transactions can be reversed from Equipment Transaction History when it is determined erroneous processing occurred. To reverse transaction processes, all required actions must be reversed in the order they were originally processed.

(2) Users have the option of searching for specific item criteria when performing searches in the Equipment Transaction History Details window. Maximizing search criteria narrows the search results for specific information. This also minimizes the impact on server performance.

(a) In the Equipment Transaction History Search window, the user can search for transactions, such as gains or custodian changes that affect the accountable equipment inventory.

(b) To access the Equipment Transaction History Search window, select the Navigate menu, then select Transaction History. In the Equipment Transaction History Search window, type or select the required search criteria and then select Search. The Equipment Transaction History Details window displays the search results.

k. Equipment Accountability. The following apply to equipment accountability in DMLSS.

(1) See paragraph 1.g.(1) of this enclosure for equipment gain procedures. Note: ECN's can only be assigned in the MA application when the commodity class of the item is set to Maintenance Record. The transaction reason is always set to Maintenance Equipment Gain – No Accountability when performing an equipment gain within the MA module.

(2) See paragraph 1.g.(2) of this enclosure for equipment loss procedures. Note: Users processing losses within the MA module can only process losses on maintenance record items only.

(3) See paragraph 1.h. of this enclosure for equipment record search procedures.

l. Equipment Request. The MA Equipment Request functionality is the same process used in EM. Refer to paragraph 1. of this enclosure.

m. Equipment Software. The Equipment Software functionality is the same process used in EM. Detailed instructions are available in paragraph 1.m. of this enclosure.

n. Network. The network tab provides information for equipment that is attached to the network. Refer to paragraph 1.j. of this enclosure.

o. New Catalog Item/Catalog Search. Catalog search procedures are described in paragraph 1.d. of this enclosure.

p. Reports. The Equipment and Technology Management module contains reports that can be used to manage a sustainment/maintenance activity as well as provide data required for higher

headquarters. Access the Reports module via the Navigation menu or Navigation toolbar. From this point, the user can select Standard Inquiry or Standard Reports. Note: The SA controls privileges to access these reports.

(1) Users are able to view standard reports that have been generated during end-of-period processing. The system maintains these standard reports throughout the specified retention period. This allows users to view standard reports generated during previous end-of-period processing sessions. When viewing standard inquiries, the system requires the user to select a report and enter the input parameters. The user can view the reports and then elect to print the reports. Reports within the Standard Inquiry option are not accumulative and are over-written when a new report is produced. The user has the option to save these reports as .PSR files on the local computer. Saving these reports allows for future reference.

(2) The following definitions describe what are normally considered reports:

(a) A report is a collection of data presented automatically on a periodic or event driven basis. Reports represent the status at that point in time and/or present data of a historical nature. The data is presented in a standardized format and cannot be manipulated. Standard reports essential for the effective management of the activity are prepared automatically and are reviewed and analyzed locally as well as at the higher headquarters level.

(b) An inquiry is similar to a report in that the inquiry presents data in a standard preprogrammed format. However, inquiries are not produced automatically on a periodic schedule. Instead, they are only produced only when a user requests the information.

(c) Most, if not all, maintenance data is available and retrievable during on-line sessions. The desired information is obtained by processing the appropriate report.

(d) The system uses Business Objects as a standard Ad Hoc retrieval program used to retrieve customized information from the database.

(e) Refer to the future DHA-TM DMLSS Volume 10, DMLSS Reports, for a brief description of each report in MA along with its content and use.

q. Equipment Maintenance Utilities Menu. The following are functions within the EM Utilities Menu.

(1) The Equipment Maintenance Inbox provides important information about actions requiring follow-up (pending actions).

(a) The inbox provides the ability to immediately view and resolve issues, thus preventing the possibility of problems developing and expanding. The inbox should be accessed daily, so issues can be addressed in a timely manner. When the MA application is launched, the Inbox window appears if there are pending actions for a sustainment/maintenance activity or individual. The user can also access the inbox from the Utilities menu.

(b) The Equipment Maintenance Inbox has three sections:

1. The MA Inbox which displays pending action messages that pertain to the Org ID of the sustainment/maintenance activity.

2. The individual inbox which displays pending action messages for a specific User ID.

3. The details section which displays additional details about a selected pending action message in the MA or Individual Inbox if they are available.

(c) The MA and Individual Inbox sections work the same way. If the user has the MA roles, privileges, and associated resources for pending actions, the user can use the Jump To icon to access the relevant records.

(2) The functionality in MA Utilities, Install Mobile Work Order Applications can be utilized in the following manner.

(a) Mobile Work Order Application information is as follows:

1. The mobile work order process allows greater flexibility to the maintenance technician. Because the Mobile Media window is smaller in nature there are some visual differences to how information is accessed in the mobile environment. Information is the same but may be distributed between multiple tabs verses a single window view.

2. Mobile work order allows the maintenance technician the ability to download work orders from the DMLSS computer system to a mobile device such as a PDA or tablet/notebook computer. Once disconnected from the network, these devices become mobile and can be used anywhere maintenance is necessary. Note, once work orders are exported from DMLSS, they are locked until the mobile device is reconnected so the completed data can be uploaded into DMLSS. The Work Order module is updated to reflect the completed work. To use this option, the Mobile Work Order application must first be activated in DMLSS.

3. Activities are also required to install active sync software that is provided with the PDA on the computer located in the maintenance shop. Active sync allows the data to pass from the computer to the PDA and back.

4. Laptop and tablet or notebook computers are required to act as the DMLSS Client in order to utilize the mobile work order function. Client, in this case, means the maintenance technician uses the laptop as his or her everyday LAN based computer applications. It is also the computer that runs DMLSS. This allows the user to disconnect the LAN and travel with the computer when work orders are exported. The data is staged in a folder on the laptop hard drive until it is imported back to the system.

(b) The privileges required to operate mobile work orders are assigned in System Services.

1. All maintenance technicians should be assigned the resources required to use mobile work order processing. The exception is if the Application Administrator or SA creates a local role and excludes this resource.

2. The unlock work orders role is essential to unlock work orders that are locked by other users. The role is assigned through System Services by the DMLSS SA or application administrator. It is recommended that the use of this role be limited to the maintenance manager and/or the team leader.

3. The following contains Install Procedure guidance.

a. Mobile work order supports two types of electronic devices: PDA and Laptop. Notebook and tablet computers fall into the laptop category. The device(s) being used determine which utility to install. Both devices need to be loaded if both devices are used.

b. To install a device, from the Utilities menu, select Install Mobile Work Order Applications. Select the mobile device type: PDA or Laptop.

c. If the device is connected, the serial number, system name, and owner name are updated in the window.

d. An information message is displayed if the device is not loaded. Check the connections and try again.

(c) The following are instructions for MA Utilities, Unlock Exported Work Orders.

1. Unlocking work orders that are already exported have grave consequences to work order management. The ability to import any work that has been performed and documented on a mobile device is lost as a result of the unlocking process. Coordinate this process fully before executing.

2. In some cases, it might be prudent to unlock an exported work order. A piece of equipment might be brought to the maintenance shop by the property custodian for maintenance before the maintenance technician has a chance to perform scheduled maintenance. A review of open work orders identifies that the equipment as requiring scheduled maintenance. The maintenance shop technician may ask the superintendent to unlock the work order so the scheduled maintenance work order may be updated with the maintenance performed.

3. The Filter button in the Unlock Work Orders window allows users to narrow search options when there are multiple exported work orders. Enter the search criteria in the fields located at the top of the window and select the Filter button. Only the items matching that search are displayed.

(d) The following are instructions for MA Utilities, Export Work Orders.

1. Exporting work orders is the process of downloading the work orders from

DMLSS to a mobile device. Data can be exported to a mobile device by using either the Utilities menu or the Work Order menu. Either method works provided the mobile device is installed.

2. To download work orders from the Utilities menu, select Export Work Orders. Within the Work Order Search window (Figure 23), select a scope and enter the applicable search criteria. Select the Search button to process.

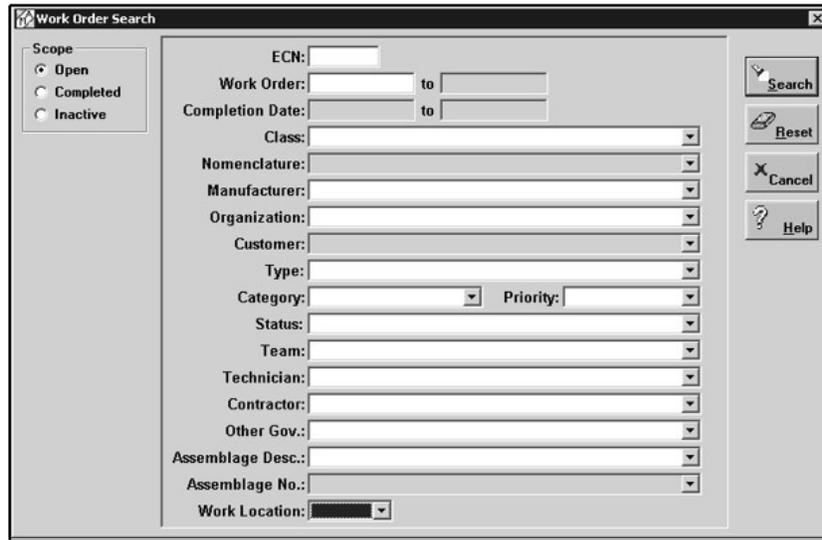


Figure 23. Work Order Search Window

3. The system displays all records matching the search criteria. Work orders that have already been exported are identified with an “E” in the exported field.

4. One, multiple, or all work orders can be selected for downloading. Highlight the desired records and select the Export icon to download the work orders to the mobile device. When the prompt appears, select the type of work orders being downloaded (Figure 24). Select the Export button to complete the transfer.

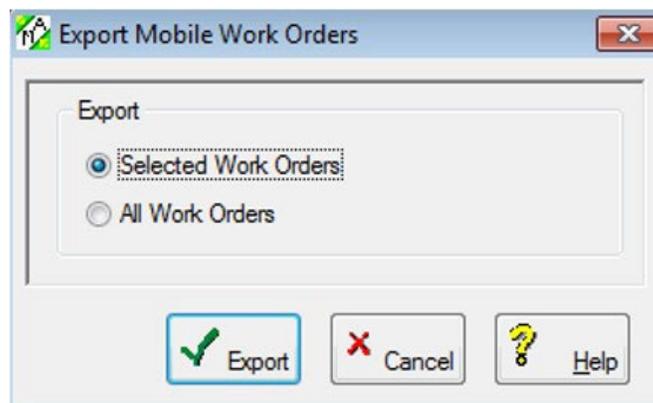


Figure 24. Export Selection Criteria Window

5. After the data is downloaded:

- a. Uncradle the PDA to begin mobile maintenance, or
- b. Disconnect the LAN cable from the laptop to begin mobile maintenance.

(e) The following are instructions for MA Utilities, Import Work Orders.

1. Completed work order data contained on the mobile device should be transferred to the work order record in DMLSS. First, cradle the PDA or reconnect the laptop to a LAN connection before proceeding.

2. Open the maintenance module and from the Utilities menu, select Import Work Orders. Select the mobile device being used and select the Import button. All data is transferred to DMLSS, updating all affected maintenance work orders. If a record was unlocked within DMLSS, the data being transferred does not update the Maintenance Work Order record.

(f) The following are instructions for MA Utilities, HHT. Where available, PDAs may be used to perform inventories. With an HHT, users may scan bar code labels on the equipment, store the inventory, and systematically reconcile the inventory. The HHT may be used in Batch mode or in the interactive RF mode, and users can switch between modes during inventory. In Batch mode, download or upload information between the HHT and a computer using a docking port.

1. Use the Transfer to HHT option to download a batch inventory from the computer to the HHT.

2. Use the Transfer from HHT option to download a batch inventory from the HHT to the computer. The HHT must be attached to the computer, a functioning Windows Mobile Device Center, and in its cradle.

3. The HHT Model Type defaults to PDA. Other types were removed from the dropdown box.

r. Cross Functional Modules. The following applications/modules are available, if provided the correct roles and permissions in System Services. The DMLSS SA can assign these privileges, if required.

(1) Equipment Accountability, Equipment Request, and Equipment Software procedures are available in the EM module.

(2) Quality Assurance (QA) is available in the IM module.

(3) Maintenance technicians assigned to order parts require ordering privileges within the CAIM module.

(4) Contract procedures are available in the Service Contracts module.

3. SERVICE CONTRACTS

a. Purpose. This application provides a method for recording service contract information and associating work orders. Contracts can also be linked to a particular equipment item. It is important to note that this application is not designed to track personal service contracts, and system transactions generated in this module do not interface outside of the DMLSS environment.

b. Contract Records. The service contract record in DMLSS reflects the contract information from a specific contract managed by the DHA Component. The window is divided into several tabs that contain specific information concerning different elements of the contract.

(1) The following are instructions to create a new record.

(a) The Main tab provides general information about a contract such as the contract period, contractor, issuing contracting office, and customer. The same information can usually be obtained from first page of an issued contract. Users can add or edit a service contract record and view contract record details using the Main tab of the Service Contract Record (Figure 25). The following guidelines apply:

Figure 25. Service Contract Record – New, Main Tab

1. DMLSS only accepts contract numbers in the format of FA____-__-D-____. The ability to enter Army/Navy contract(s) or contracts with task orders does not exist. Once

entered, the contract number, Call/Due-Out No, Contract Type, and Service Type cannot be edited.

2. Contract numbers cannot be duplicated. If two task orders have the same contract number, one must be altered in order to add both of them into DMLSS.

3. The contractor must exist as an SOS on the IM side with an SOS type of “CON” in order to appear in the Contractor Name drop down menu.

(b) Use the Contracting Officer’s Representative (COR) / Contracting Officer’s Technical Representative tab to add or edit contract record details about the primary COR or the Contracting Officer’s Technical Representative. Also, identify if this individual has Quality Assurance Evaluator (QAE) responsibility from this tab. Complete all required fields and update as changes are identified.

(c) Contract provisions are identified within the Statement of Work and identify specific requirements about the contract. Place of performance, duty hours, overtime hours/days, labor rates, renewal options, and materiel cost basis are some of the areas that should be updated when loading contract information. Select the N/A checkbox for items that do not apply to the contract.

(d) The Services tab identifies CLINs referenced in the main contract and identifies the service requirements. Select the Add button within the Services tab and enter the CLIN information from the contract. DMLSS currently does not allow for recording partial hours when generating a call. A suggestion to allow partial hours billing is to set up a sub-CLIN with a description referencing the partial hour and using a unit price of partial hour. Figure 26 reflects an example of loading CLINs for partial hours.

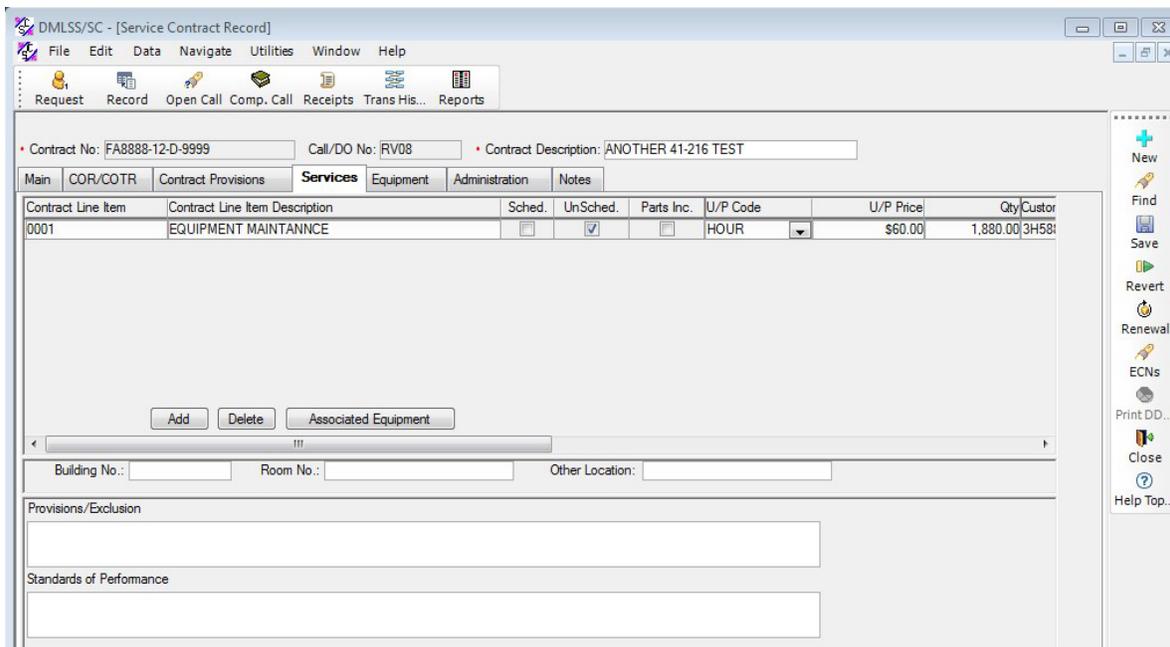


Figure 26. Loading Partial Service Hours

1. If the service type selected on the main tab is related to equipment, users can select the Associated Equipment button to view the equipment and components for that contract. The information is populated from the Equipment tab, refer to paragraph 3.b.(2)(e) of this enclosure and linked to the equipment data record.

2. The Provisions/Exclusion field is used to specify services and supplies materiel that are provided for in the contract. Complete if required.

3. The Standard of Performance field identifies criteria that must be met for acceptance of services. These could be QAE responsibilities or state that the unit works in accordance with manufacturer's specification upon completion.

(e) The Equipment tab associates equipment and components to the service contract record and is only available for service types of Equipment-Maintenance or Equipment-Lease. From the window, Add and/or Delete equipment information or view an equipment record's detailed information.

1. When a technician opens the work order of an associated ECN, the technician is notified in red letters that a contract is associated with the ECN.

2. Note: If the service type is related to facilities, a Facility tab appears. Neither of these tabs appear if the service type selected is not related to facilities or equipment so use caution when setting up the record since this field cannot be edited later.

(f) The Administration tab contains financial and call number information regarding the contract. Set call number blocks to mirror local policy and set call number to auto-generate if required. Enter the total contract award amount to track expenses associated with the contract. Payment terms are found on the first page of the awarded contract.

(g) Within the Notes tab, it is important to document conversations, funds increase requests, training, and problems associated with any contract. Use the Notes tab to keep track of information regarding the contract. Some examples include funds increase requests, vendor performance, and training received for the QAE and/or COR.

(3) Use the Contract Record Search window to search for contract records or create a service contract record.

c. Contract Request. The following information applies to the Contract request window.

(1) In the Contract Request window, the user can request a new contract for services or edit an existing request. The Contract Request window is also used to record a purchase card buy.

(a) Within the Main tab of the Contract Request window (Figure 27), a new contract

for services can be requested, or an existing requested. The Contract Request window is also used to record a purchase card buy.

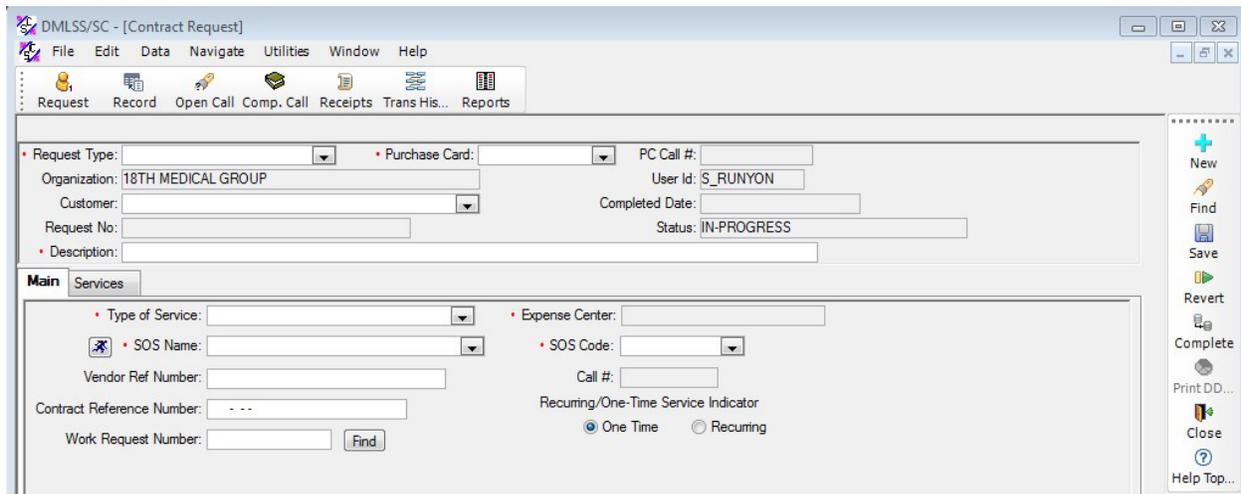


Figure 27. Contract Request Window – Main Tab

(b) Use the Contract Request – Services tab to describe the individual services (contract line item numbers or CLINs) to be included in a contract.

(c) In the Equipment tab, the user can edit the list of equipment items associated with a contract request. Note: The Equipment tab is available only for service types of Equipment-Maintenance or Equipment-Lease.

(2) Use the Contract Request Search window to search for service contract requests. The search results can also print, or a new service contract request created.

d. New Call. Use the New Call feature to document contract services once the contract is entered into DMLSS.

(1) Select the New Call button located on the vertical toolbar to access the Call Detail window (Figure 28) when a service is used against the contract.

The screenshot shows the 'Call Detail' window with the following fields and values:

- Call Information:**
 - Call No.: 1112
 - Contractor: A.M. BICKFORD
 - Call Date: 23 May 2016
 - SOS Code: AMB
 - Pay Method: BILL
 - Call Total: \$60.00
 - Placed By: dwyem
 - Contract No.: FA8015-12-V-1545
- Call Notes:** (Empty text area)
- CLIN Detail:**
 - Customer: 01211A - ELIPSE CHARLIE
 - Exp Ctr: 012111
 - CLIN: 0001 - TEST10
 - CLIN Desc.: TEST10
 - U/P: HOUR
 - U/P Price: \$60.00
 - Document No.: FM52706147D004
 - Date Due: 23 May 2016
 - Qty Due: 1.00
 - Amount Due: \$60.00
 - Date Received: (Empty)
 - Qty Received: .00
 - Amount Received: \$.00

Buttons at the bottom: Save, Close, Help.

Figure 28. Call Detail

(2) Complete all required information, and enter any applicable notes associated with the call. Multiple CLINs can be entered for a call by selecting the Add button. Information for each CLIN, in most cases, is necessary for cost estimating. If the estimate contains partial hours, enter the corresponding sub-CLIN that applies to the estimate (if established).

(3) Enter the work order number and ECN if the call is performed against an equipment item with an open work order.

(4) Saving the call detail information adds the new call number to the call register file.

e. Call Register. Locate the Service Contract Record window of the desired record and select the Call Register icon located on the vertical toolbar to view all call numbers associated to a selected contract.

(1) CLIN detail information is provided for each selected call. Select the Call Detail button to perform updates to open contract calls. Call Details provides all call information, call notes, CLIN detail information, payment, and document numbers assigned to a selected call under an associated contract. Entering the document number closes the call for services performed.

(2) Select the Open Call button located on the horizontal toolbar to search for open call numbers for a specified contract(s). Open calls can be viewed and/or modified, and call receipts can be processed using the Open Call feature. Note: Selecting Open Call on the horizontal toolbar returns the register of all calls for all contracts. If the contract being worked is known, it is easier to go directly to the call register for that contract by using the button on the vertical toolbar.

(3) Use the Open Call Register option located on the Navigate menu to view the register of open calls.

(4) Use the Comp Call button located on the horizontal toolbar to search for and view all completed call numbers for specified contracts. Review and/or modify call details in order to process additional expenditures not previously identified. When the call is modified, the requirement reverts to open call status and receipt actions are required. Changes are reflected in the CLIN Details in the Completed Call window.

(5) Use the Completed Call Register option located on the Navigate menu to view the register of open calls.

f. Receipts. When calls are complete, select Receipts in the navigation menu or use the Receipts button on the horizontal toolbar to generate the DD Form 250. The actual quantity (services performed based on CLIN information) received and the date performed must be entered. Select Save to update the call register and generate the DD Form 250. The number of copies that are needed during printing can be selected. A “CSR” transaction is generated when a receipt is processed for a service contract.

g. Transaction History. In the Transaction History window, the user can view details of contract-related transactions and can reverse certain transactions. The Service Contract transaction history provides an auditable record of transactions such as receipts or purchase card buys that affect funds or due-ins. Use this module to verify that contract transactions have been processed properly and to determine the necessary corrective actions when an error has been identified. Users cannot see Service Contract transactions in CAIM or IM transaction history, nor can they see CAIM/ IM transactions in Service Contract transaction history. Note: Only due-in quantity decrease (“CSC”) and receipt (“CSR”) transactions can be reversed in the Service Contract module.

h. Standard Reports. Standard Reports include: Contract Expiration, Purchase Card Register, and Transaction History.

(1) The Contract Expiration report is a list of recurring service contracts that are set to expire by a specified date. When the report is generated, the user is prompted to specify the date. Use this report to determine which contracts need to be renewed.

(2) The Purchase Card Register report is a summary of Government Purchase Card activity for a particular purchase card. It shows all Government Purchase Card buy information at the purchase card call level and includes all line items in the call. This report mirrors the information contained in the IM Purchase Card Register.

(3) The Transaction History Report allows the user to use various search criteria and sort preferences to view all Service Contracts transactions. This report is similar to the Transaction History module; however, the results of this report can be saved to file as a spreadsheet.

i. Contract Renewal. Contracts that are written for multiple years are renewed annually, provided services are still required. To reflect a contract renewal against an existing contract, the renewal option must be established in the Contract Provisions tab in the Service Contract record. If the renewal indicator “N/A” is checked, a renewal cannot be established.

(1) Select the Renewal button on the toolbar to open the Contract Renewal/Extension window. Select the Renewal radio button, and enter the renewal information of the contract and add notes, if required. Select Save to update the contract record.

(2) The Renewal option is also used to record contract extensions. When an extension is authorized, select the Extension Radio button and enter the extension information and any related notes as needed. Use the funding document to update financial information in the Service Contract Record, Contract Provisions, and Administration tabs.

(3) When a contract is complete or cancelled anytime during the contract period, enter a note referencing the reasons for contract termination, and select the Delete button on the toolbar. The Contract record is then marked for deletion and further actions cannot be processed from that point forward. If a contract was deleted by mistake, select the Undelete button from the toolbar to reactivate the contract and make a note entry of the mistake in the Notes tab.

(4) Deleted contracts are archived in DMLSS to allow for the retrieval of information as necessary.

ENCLOSURE 4

EQUIPMENT MANAGEMENT PENDING ACTIONS

1. OPENING THE EM MODULE. When the EM application is first opened, a message or a list of messages may appear in the In-Box describing actions that are advisory, were not completed, or need to be completed. These are called Pending Action Messages. The following tables list each message, describe the meaning of the message, and suggest the action or actions to best remedy the problem.

2. THE INBOX. The Inbox is in tree view format. That is, if there are multiple pending actions of the same type, the message appears only once, so the user can select + next to it to see the individual messages underneath. When an individual item under a pending action is selected, the item details appear in the Details section in the lower portion of the window.

3. PENDING ACTIONS. The EM Inbox has sections for two different types of pending actions: Advisory Notices and Action Required. Note: An Advisory Notice pending action message can be deleted, but before deleting the message, some research should be completed. When a pending action message is selected and the Process button is selected, the system jumps to the related record.

Table 1. Equipment Management Pending Actions

| Message | Description | Action(s) |
|--|---|---|
| Accountable Equipment Code Has Changed To Y | Produced when the accountable equipment code for an equipment item was changed from N to Y. | Search Transaction History by Item ID to find out which customers have the item. Verify the item(s) and label with the ECN. |
| An Equipment Order Has Been Cancelled | Appears when an equipment order cancellation has processed. | Decide whether or not to resubmit the order. |
| Commodity Class Change Alert (Supply to Equipment) | Produced when the commodity class for the specified Item ID was changed from Supply to Equipment. | Search Transaction History by Item ID to find out which customers have the item. Verify the item(s) and label with the ECN. |

| Message | Description | Action(s) |
|--|---|--|
| Custodian Does Not Have Equipment | Generated during the EOM process when an assigned custodian account no longer has equipment assigned. | Remove the custodian from the customer account, and the pending action is then removed. |
| Customer Equipment Request Submitted | Appears when an Equipment Custodian submits a new equipment request. | Review request for completeness, obtain additional paperwork from custodian as necessary (e.g., quotes, literature, sole source letters), add required personnel/sections to the Coordination tab (e.g., Maintenance, Facilities) and route for review and approval/disapproval. |
| Replacement Item Received. Turn-In Replaced Item | Appears when a new piece of equipment is issued to a customer as a result of an Equipment Request assigned a Request Type of Normal Replacement or Accelerated Replacement. | Custodian turns in the replaced equipment to the HTM Activity, and the equipment must be removed from the custodian's accountable records. |
| EM Excess Report Rejection | Generated during end-of-day (EOD) process and provides notice that a reported excess item has been rejected. | Cancel reported excess and take appropriate actions to re-report as excess or turn-in to local DLA Disposition Services. |
| EM Excess Troubled Ship | Generated during the EOD process and produced when follow-up notification is received to previously received ship status. | Process a Ship Notification in the Excess Follow-up window in IM. Ship equipment if not already done. |
| Equipment Acceptance Pending | Appears when a receipt or gain is processed for an equipment item. | From the Inbox, enter Equipment Manufacturer, Nameplate Model, and Manufacturer Serial Number in the associated equipment record(s). Data can also be entered while working the MA work order. |

| Message | Description | Action(s) |
|--|--|---|
| Equipment Issue Reversed | Appears when an issue reversal is processed for equipment item. | Validate reversal of equipment item resulted in being issued to appropriate customer, reported excess, turned in to DLA Disposition Services or transferred to HTM Hold account. Equipment items should not be maintained as operating inventory. |
| Equipment Request Review Is Overdue | Appears when an equipment request review date is exceeded. | From the Inbox, extend the length of review by increasing the Days to Review data field or select a Date Review Complete on the Coordination tab of the Equipment Request window. |
| Letter of Authority (LOA) Expires Within 10 Days | Generated during the EOD process when the LOA date is set to expire within 10 days. | Select a new date from the drop-down calendar for the LOA Expiration Date that is greater than the System date or select a date from the drop-down calendar for the LOA Return Date in the LOA section on the Status tab of the Equipment Request window. |
| Custodian Departure Within 45 Days | Generated during the EOD process when the departure date in the custodian record is within 45 days. | Conduct inventory and delete record from inbox. If custodian departure has changed, update the custodian's record. |
| Potential Custodian Inventory List Generated | Generated during the EOM process when the inventory due date in the custodian record is due within the next 90 days, there is no active inventory records for the customer, and the customer has active equipment records. | Conduct the inventory if needed; otherwise, delete record from the inbox. |

| Message | Description | Action(s) |
|---|--|--|
| Unable to Locate Accountable Equipment | Generated during the EOD process and appears when maintenance personnel identify an equipment item as missing or unable to locate. | Research the last known location, initiate a financial liability investigation if necessary, or take other appropriate measures. |
| Update LOA Return Date | Generated during the EOD process when the LOA return date is exceeded. | Select a date for the LOA Return Date in the LOA section on the Status tab of the Equipment Request window. |
| EM Inshipment Notification | Shipping notification was received into the system during the EOD process. | After confirming inshipment status and processing the receipt of this item, select the Ship History icon on the vertical toolbar. This displays both the receipt acknowledgment and complete status of the inshipment and sends the “EDI 861” file back to the issuing treatment facility. |
| EM Inshipment Past Required Delivery Date | This pending action is produced for all inshipments past their required delivery date. | Highlight the item and determine if the shipment is overdue or has receipt been processed. |
| Equipment Acceptance Pending | This is a notification of an Acceptance Inspection work order. | This message is deleted when the maintenance technician enters the equipment manufacturer, nameplate model, and manufacturer serial number in the associated equipment record(s). |

4. PENDING ACTIONS RESOLUTION STEPS. Table 2 lists the EM Action Required pending action messages that can appear in the Inbox, a brief description and the action required to resolve each pending action.

Table 2. Equipment Management Action Required Pending Action Messages

| Message | Description | Action(s) |
|--|---|---|
| Blank Acquisition Date in Capital Equipment Record | Generated during the EOM process and produced when a blank acquisition date is detected for a capital equipment item. | Enter an acquisition date in the Approval and Acquisition tab of the Equipment Record Detail window. The depreciation value for capital equipment is reported to Defense Finance and Accounting Service, and the acquisition date plays a key role in calculating that value. |
| EM Excess Destroy Materiel | Generated during the EOD process and appears when destruction status is received for reported excess equipment. | Process a loss and ship the excess items to DLA Disposition Services for destruction. |
| EM Excess Ship Materiel | Generated during the EOD process and produced upon receiving ship status for equipment reported excess. | Process a loss and ship the excess item(s) to the treatment facility indicated in the disposition instruction received from the excess distribution system. |
| EM Excess Turn-In to DLA Disposition Services | Generated during the EOD process and produced upon receiving turn-in status for equipment reported excess. | Process a loss and ship the excess item(s) to DLA Disposition Services. |
| EM Excess Turn-In to Installation Supply | Generated during the EOD process and produced upon receiving turn-in status for equipment reported excess. | Process a loss and ship the excess item(s) to Installation Supply. |
| Equipment Issue Pending | Appears when an equipment issue is pending awaiting completion of required data. | Enter the Equipment Manufacturer, Nameplate Model, and Manufacturer Serial Number in the associated equipment record(s). |

| Message | Description | Action(s) |
|---|---|---|
| Inventory Due Within Thirty Days | Produced when the Next Inventory Date in the custodian record is within 30 days. | Create an inventory for the customer account or change the Next Inventory Date in the custodian record to more than 30 days beyond the current System Date. |
| Inventory Lists Generated | Generated during the EOM process. This is a notification of existing inventory list(s) | Reconcile the inventory list(s) generated in the batch cycle. |
| LOA Has Expired | Generated during the EOD process. It is a notification that LOA Expiration Date has been reached. | Select a date from the drop-down calendar for the LOA Return Date in the LOA section on the Status tab of the Equipment Request window or select a new date from the drop-down calendar for the LOA Expiration Date that is greater than the System date. |
| Loan Has Exceeded Loan Return Date by 30 Days | Generated during the EOD process and produced when an Equipment Loan has exceeded the return date by 30 or more days | Increase the Length of Loan/Durable Length of Loan or return the item to the loaning account using the Items tab of the Loan Information window. |
| Loaned Items Expiring. Check Loan Reminder List | Generated during the EOD process and produced as a reminder that the loan status of an equipment item is about to expire. | Update the associated Patient Letter Sent Date in the Loan Reminder List window, increase the Length of Loan/Durable Length of Loan, or return the item(s) to the loaning account using the Items tab of the Loan Information window. |

| Message | Description | Action(s) |
|---------------------------|--|--|
| EM Tracking Number Needed | This pending action is produced for all outshipment items lacking a tracking number. | Open the pending actions list by selecting the Jump-To button. The Distribution and Transportation Module/Outshipment Results screen appears. Enter the Transportation Control Number/Tracking Number. |
| EM Transportation Pending | Distribution and Transportation Module Outshipment. | Review the Ship History screen. In the Outshipment Results screen the status of Request is displayed to indicate that the “EDI 940R” file has been sent to Cargo Movement Operations System. |

ENCLOSURE 5

MAINTENANCE ACTIVITY (MA) PENDING ACTIONS

1. When the MA application is first opened, a message or a list of messages may appear in the In-Box describing advisory actions to be reviewed/completed. These are called Pending Action Messages. The following chart lists each message, describes the meaning of the message, and suggests the action or actions to best remedy the problem.

2. The Inbox is in tree view format. That is, if there are multiple pending actions of the same type, the message appears only once, so select + to see the individual messages underneath. When an individual item under a pending action is selected, the item details appear in the Details section in the lower portion of the window.

3. The Inbox has sections for two different types of pending actions: Maintenance Activity Inbox and Individual Inbox. Note: The Maintenance Activity Inbox displays pending action messages that contain the Maintenance Activity Organization ID.

Table 3. The Maintenance Activity Inbox

| Message | Description | Action(s) |
|--|--|--|
| Acceptance Work Order Pending | Appears whenever a new equipment item is added to the inventory. | BMET completes acceptance inspection work order and updates required data in equipment record. |
| Commodity Class Change Alert (Supply to Equipment) | Appears whenever the commodity class of an item is changed from supply to equipment. | BMETs need to be aware that this action produces an acceptance inspection work order. Process acceptance inspection work order as necessary. |
| Equipment Assembly/Disassembly Occurred | Appears whenever an Assembly/Disassembly transaction has occurred. | BMETs should make appropriate corrections to the ECNs. |

| Message | Description | Action(s) |
|--|--|---|
| Equipment Item Loss | Appears whenever an equipment loss transaction is processed. | No action required. Informational only; however, the equipment data file should be removed, and if this is the last item of a specific type in the facility, the technician should ensure the technical literature and associated parts from bench stock are removed. |
| Equipment Record Deleted by Gain Reversal | Appears when a gain reversal transaction has occurred. | No action required. Informational only. Note: This may leave an open acceptance work order that needs to be either cancelled or completed. |
| Equipment Record Reinstated by Loss Reversal | Appears when a loss reversal transaction has occurred. | This usually occurs after Unable to Locate (UL) or Financial Liability Investigations of Property Loss items are found and reinstated. It is possible this item may have scheduled maintenance due if its inspection cycle lapsed significantly. |
| Equipment Transferred to New Customer | Appears whenever an equipment item is transferred from one customer to another. | Ensure equipment location fields in equipment detail are updated accordingly to the new location/room numbers. Scheduled maintenance due dates may need to be updated to align with section maintenance schedule, if applicable. |
| MA-Equipment Issue Reversed | Appears whenever equipment being issued to the sustainment/maintenance activity is reversed. | No action required. Informational only. Note: This may leave an open acceptance work order that needs to be either cancelled or completed. |

| Message | Description | Action(s) |
|--|--|---|
| Maintenance. QA Alert. Equipment QTY Required | Appears whenever a QA Alert [also known as a Hazard Alert and Recall (HAR) message] has quantity on hand. Potentially matched an equipment item within the treatment facility. | Enter a quantity in the Quality Assurance Detail window. |
| Maintenance Requirement Changed | Appears whenever the maintenance requirement indicator of an item is changed. | BMETs should schedule maintenance for item based on maintenance intervals. Items adjusted to Maintenance Required require a local maintenance plan, and each ECN's maintenance record needs to have due dates inserted. Items adjusted to No Maintenance Required require the due dates to be removed. |
| Monthly Timesheets are Due | This is produced every month to inform maintenance personnel to complete time sheets. | BMETs should provide updates to timesheets before EOM. |
| QA (HARN) Alert. Item QTY Required Cust (Supply) | Appears whenever a QA (HARN) Alert has potentially matched a supply item within the facility. | Enter a quantity in the Quality Assurance Detail window. |
| QA (HARN) Delinquency Notice. Equipment QTY | Appears when a QA (HARN) delinquency notice is generated based on the established intervals in the Quality Assurance Class table. | Enter a quantity in the Quality Assurance Detail window. |
| QA (HARN) Delinquency Notice. Supply item QTY Cust | Appears when a QA (HARN) delinquency notice is generated based on the established intervals in the Quality Assurance Class table. | Enter a quantity in the Quality Assurance Detail window. |

| Message | Description | Action(s) |
|------------------------------------|--|---|
| Receipt reversal processed for ECN | Generated when a receipt reversal is processed for a given equipment item. | No action required. Informational only. Note: This may leave an open acceptance work order that needs to be either cancelled or completed. |
| Repair Part Changed to Supply Item | Appears whenever a repair part is changed to a supply commodity class. | BMETs must ensure that the change was indeed appropriate for the item. Repair parts are items that can only be ordered by the sustainment/maintenance activity. |
| Repair Parts Available for Issue | Appears when there is an on-hand balance > 0 for a requested repair part. | Issue the repair part to the designated work order. |
| Supply Item Changed to Repair Part | Appears whenever a supply is changed to a repair part commodity class. | BMETs must ensure that the change was indeed appropriate for the item. Repair parts are items that can only be ordered by the sustainment/maintenance activity. |

Table 4. The Maintenance Activity Pending Action Messages

| Message | Description | Action(s) |
|-------------------------|---|---|
| Departure Date Exceeded | Notification that Departure Date in the Staff Detail record, General tab has been exceeded. | Extend the Departure Date past the current date or select the Inactive icon in the affected staff record. |
| “ERC” Work Order | Appears whenever the “ERC” designation is identified within an equipment record. | No action required. Informational only. |

| Message | Description | Action(s) |
|----------------------------|--|----------------------------------|
| Monthly Timesheets Are Due | This is produced every month to inform maintenance personnel to complete time sheets. | No action required. |
| Priority Work Order | Is generated whenever an equipment work order status is designated as an emergency work order. | Complete work order as required. |
| Overdue Work Order | Generated whenever a work order has not been completed during its schedule monthly cycle. | Complete work order as required. |

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

| | |
|-------------|--|
| Asbly/Dsbly | assembly/disassembly |
| BMET | Biomedical Equipment Technician |
| CAIM | Customer Area Inventory Management |
| CAL | Custodian Action List |
| CLIN | Contract Line Item Number |
| COR | Contracting Officer's Representative |
| DAD | Deputy Assistant Director |
| DHA | Defense Health Agency |
| DHA-TM | Defense Health Agency-Technical Manual |
| DLA | Defense Logistics Agency |
| DMLSS | Defense Medical Logistics Standard Support |
| ECN | Equipment Control Number |
| EM | Equipment Management |
| EOD | end-of-day |
| EOM | end-of-month |
| FM | Facility Management |
| FSC | Federal Stock Class |
| HHT | hand held terminal |
| HTM | Healthcare Technology Management |
| ICN | Inventory Control Number |
| ID | identification |
| IM | Inventory Management |
| LAN | Local Area Network |
| LOA | Letter of Authority |
| MA | Equipment Maintenance Activity |
| MDE | Medical Device and Equipment |
| MEDLOG | Medical Logistics |
| MHS | Military Health System |
| MTF | military medical treatment facility |
| NER | New Equipment Request |

| | |
|-----|-----------------------------|
| Org | organization |
| PDA | Personal Digital Assistant |
| POC | point of contact |
| QA | Quality Assurance |
| QAE | Quality Assurance Evaluator |
| QTY | quantity |
| RF | radio frequency |
| SA | Systems Administrator |
| SOS | source of supply |

PART II. DEFINITIONS

Unless otherwise noted, these terms and their definitions are for the purpose of this DHA-TM.

DHA Component. Activities under the authority, direction, and control of DHA

HTM Activity section. The organization within the DHA Component responsible for managing medical devices and equipment.

military medical treatment facility. A facility established for the purpose of furnishing medical and/or dental care to eligible individuals.

sustainment/maintenance activity. The organization within the HTM Activity section responsible for maintenance of medical devices and equipment.