



What to Log When Onboarding New Equipment in a Hospital Setting

Tags	CMMS Documentation Internal Documentation SOP
Category	Documentation & Knowledge Management

The Context

When I worked in healthcare technology management, I was responsible for keeping our CMMS clean, audit-ready, and actually useful. One recurring issue kept costing us time and credibility: nobody was entering consistent information when new equipment showed up.

The process varied by person, department, and day of the week. Some assets had serial numbers and warranty info. Others had nothing but a name and a guess. That didn't just cause minor headaches. It wrecked our ability to track service histories, manage recalls, and prove compliance when inspectors asked for documentation.

So I wrote a simple internal guide that laid out what to log, why it matters, and how to do it right the first time.

The Problem

Our CMMS had a mess of duplicate records, blank fields, and inconsistent asset histories.

Nobody had defined what information was required when new equipment was entered into the system. Some of the data was buried in PDFs or vendor emails. Other times, it was never collected at all.

This made routine tasks harder. It also created serious risk when it came to compliance audits, recall tracking, and service accountability.

What I Did

- Created a clear, practical checklist that defined what should be logged for every new asset: serial number, model, warranty start and end dates, vendor contact info, asset tag, and any installation notes.
- Made sure it worked for techs and admin staff, not just managers. The guide used plain language and real-world scenarios, not policy-speak or system jargon.
- Tied each field back to what could go wrong if it was missing, like billing errors, missed service calls, or failures during an FDA audit.
- Worked with the team to add these steps to our onboarding workflow so the data was captured early and clean.

The Outcome

The guide was adopted across departments and reduced the number of incomplete or incorrect asset records within weeks.

It saved us time, cut down on follow-up emails, and gave leadership more confidence in our reporting. When recall notices came through, we could search by serial number and respond quickly.

It also helped our team understand why good data matters, not just to auditors but to the people fixing equipment, logging service events, and planning budgets.

Why It Matters

Documentation isn't just about writing things down. It's about making sure the right people can find the right info, at the right time, with no surprises.

This piece turned a frustrating gap into a working process. It showed that internal documentation doesn't need to be long or formal to make a real impact. It just needs to be clear, consistent, and built around how the work actually gets done.

New Equipment Onboarding Checklist

Use this checklist during equipment delivery, installation, or initial entry into your facility's tracking system.

Pre-Entry Details

- ☐ Make, model, and manufacturer
 - ☐ Serial number or asset tag
 - ☐ Department or location assigned
 - ☐ Purchase order or requisition reference
 - ☐ Equipment category and risk classification
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Physical Inspection

- ☐ Inspect for visible damage
 - ☐ Apply facility-issued asset tag
 - ☐ Confirm delivery contents match packing slip
 - ☐ Take a reference photo for internal records (if policy allows)
 - ☐ Note any missing accessories or setup delays
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Documentation to Upload or Attach

- ☐ User manual and service manual
 - ☐ Warranty and service agreement
 - ☐ Manufacturer's recommended PM schedule
 - ☐ Compliance certificates (FDA, CE, or facility-required)
 - ☐ Commissioning or incoming inspection log
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CMMS Entry

- ☐ Create new asset record with complete metadata
 - ☐ Add assigned technician or service provider
 - ☐ Log preventive maintenance schedule
 - ☐ Set review date for first PM
 - ☐ Include any installation notes or exceptions in comments
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Final Steps

- ☐ Notify department that equipment is ready for use
- ☐ Confirm documentation is uploaded to SharePoint or your designated system
- ☐ Mark intake as complete in tracking sheet or workflow board

☐ Flag any outstanding items for follow-up