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Additional Qs & As from the Attainia master class
The Equipment Planner's Role, broadcast on June 25, 2020

Questions about the medical equipment planning function:

Q: What are the qualifications to become a medical equipment planner?

- **Paula Cleaver** – There is no degree or certification. It's on-the-job training. I came to my first equipment planning job with a background as a supply chain buyer. I know many who came with no experience. Some have clinical. Some have biomed. Some are former supply chain buyers like myself.
- **Valerie Lynch** – As far as I know, there aren't any specialized degree or certificate tracks for this niche industry. General Project Management skills are incredibly helpful, but an EP needs to be industrious, do a lot of reading/researching and know how to have a fruitful discussion to ensure that decisions are being made in a timely manner. Finding a mentor or someone who has experience in the industry is also incredibly valuable.

Q: How significant is it for the medical equipment planner to have previous clinical experience?

- **Paula Cleaver** – I think having some exposure to how hospital departments function is good. A lot of medical equipment planners come with supply chain, biomed and clinical experience. Since there is no formal training or certification for equipment planning it is a skill that is learned on the job.
- **Valerie Lynch** – I think any little bit of clinical experience helps, but I don't necessarily think that is make or break it. Understanding hospitals as a whole and how the different departments function/flow is helpful, but you can't be an expert in everything so you have to know when to ask questions, when to google on the fly and do a TON of research in preparation for meetings.

Q: What additional skills/resources/certificates would you recommend for a developing medical equipment planner?

- **Paula Cleaver** – Project management skills are a must. PMP certification is great, but has not become a pre-requisite skill set to become a medical equipment planner. Knowledge of Microsoft Excel, AutoCAD and Bluebeam is a pretty baseline pre-requisite. Revit is becoming a must know skill for equipment planners as well.
- **Valerie Lynch** – General PM skills for sure. CAD or revit knowledge I think would be helpful but not necessarily a must. Attainia product certification would be a nice to have. An understanding of construction documents/drawings/workflows or clinical knowledge is also very useful. I think some of the best equip planners I know have an incredibly diverse background and are able to synthesize all of those skills into equip planning.



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Questions about Attainia software, tools and resources:

Q: What applications or tools do you use throughout your project planning processes?

- **Paula Cleaver** – Attainia. I have used home grown applications. The home-grown apps work for reporting and tracking. But what I experienced is that they have to be maintained continually for accuracy of data and models, etc. Attainia provides all of that maintenance and also provides pricing ROM and GPO information.
- **Valerie Lynch** – Attainia! I would not have been able to do my job as successfully as I did without Attainia. It's also helpful to have an understanding of Revit/CAD and Microsoft™ Project.

Q: What report is typically used to send to procurement for them to buy equipment?

- **Paula Cleaver** – Attainia can generate a lot of very detailed reports for procurement. I tend to use the procurement schedule that has manufacturer, vendor/distributor, lead times and delivery date fields. We use validation meetings to gather approvals for purchasing which gives supply chain the approvals for purchasing the items. Validation is a large subset of procurement.
- **Valerie Lynch** – From Attainia I have used a combo of the item summary report, need by date report and the room by room report depending on the project.

Q: In Attainia, how do you pull counts for one type of equipment - example all scanners for a hospital?

- **Paula Cleaver** – Attainia can slice and dice data in almost every way imaginable. Through using the "filter" field a report can be run in multiple ways. Also, since the reports export to Microsoft Excel, you can slice the data up further.
- **Valerie Lynch** – Attainia has a variety of filters and different kind of reports to zero in on the details you need. Please contact Attainia for additional details or a personalized demo!

Q: Can PO information be entered into Attainia and show on status reports? Such as PO #, due date, and date rcvd?

- **Paula Cleaver** – Yes- that is what is nice about Attainia. All of the data is exportable in Excel and PDF formats.
- **Valerie Lynch** – Yes...Please contact Attainia for additional details!



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Q: Where are your primary sources for new technology and what tradeshow (if any) are most useful? Assuming there will be tradeshow again.

- **Paula Cleaver** – Attainia routinely send out notifications on new vendors and technologies. All of the major design conferences such as ACE, ASHE PDC are helpful as well as AORN and RSNA.
- **Valerie Lynch** – Attainia and the Internet (especially during this wild time). But there is great value in getting to see/feel the equipment for yourself. In the past I have found ASHE PDC, ACE reverse Expo, NeoCon (for furniture), GPO sponsored conferences/trade shows very valuable.

Q: What is the best process for manufacturers to get in front of equipment planners to share latest product, value proposition, etc.?

- **Paula Cleaver** – We engage vendors through lunch and learns as well as show rooms visits and conferences. We typically have 2 lunch and learns a month. Most vendors love the opportunity to get in front of an audience.
- **Valerie Lynch** – When I was in-house, I would prefer that all the mfg's and vendors were part of the Attainia catalog. That way I would have access to all of the same details when I needed it. However, I do think it's important to have meetings and relationships with the local reps in the area if you're able.

Questions about general equipment planning processes:

Q: You talked about when an equipment planner should come on a project, but when do you believe they can move on to the next project?

- **Paula Cleaver** – Ideally an equipment planner should be on the project from beginning to end. The equipment planner is key during installation to provide historical data on how decisions were made and implementation of design intent. Equipment planners tend to manage several projects since work efforts vary during project phases.
- **Valerie Lynch** – Depends on the team or individual bandwidth and scope of the projects. Sometimes there is some downtime between when the final documents are delivered and equipment install because construction can take a long time. Just be prepared to jump right back in during equip install and keep your eyes on the big construction milestone dates.



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Q: Do equipment planners normally request the quotes for equipment, or is that passed to supply chain to do?

- **Paula Cleaver** – With authorization from the Project the equipment planner does get everything from budgetary to final PO-ready quotes. When quoting, the options and accessories need to be reviewed to make sure none of them have design impact. Having the equipment planner at least review them if supply chain gets them is helpful to avoid change orders.
- **Valerie Lynch** – I think that depends on the project and the organization. Most of the projects I've worked on required the Equip Planner to provide quotes. Sometimes it makes sense if you've been working closely with a vendor on site specific drawings or specific project details then the EP already has a relationship with that vendor to obtain the quote.

Q: Do equipment planners typically have a master equipment list of manufacturers or products they default to if the client does not have a product preference?

- **Paula Cleaver** – When we develop a list we start with typically used vendors. If we have no information on hospital standards we can usually guess that in a particular category there are 2 or 3 most used vendors. Or we start with the latest technology from a vendor that may have the most complex coordination for Basis of Design.
- **Valerie Lynch** – The client dictates standards if they have them. The longer you're in the planning field you'll probably start to make relationships with vendors/manufacturers that you work with frequently, but I always brought all of the options to the table for the clinical team to make the decisions on their equipment. At the end of the day I knew I wasn't going to be the one living with it, so I wanted them to choose what made the most sense for the project/space/budget. It is important to understand the landscape of the marketplace to make sure you're bringing in the technology that fits the needs of the project and budget.

Q: At the start of a project do you review a responsibility matrix to confirm who is planning what?

- **Paula Cleaver** – A responsibility matrix is generated at the beginning of DD. It is a template of typical install responsibility. Imaging systems are typically vendor while laminar flow hoods or biological safety cabinets are typically contractor-installed, for example. A responsibility matrix is key in the pricing effort for a construction project. We issue it during DD and CD phases and re-review it during construction to ensure the contractor is still in tune with the matrix decisions.
- **Valerie Lynch** – Absolutely. More often than not the architect will provide a generic responsibility matrix, or the organization will have one that fits in with their equipment standards and responsibility needs. It's very important to make sure the project team as a whole understand who is responsible for doing what from the beginning. It makes for a much smoother project to have a very clearly defined responsibility matrix that is referenced often. As an equip planner, I took extra time to review and continue reviewing throughout the project to make sure everything was accounted for, especially as project scope changed.



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Q: How do you feel about architects playing equipment planners?

- **Paula Cleaver** – Architects who are healthcare architects know a lot about types of equipment needed. There are medical planners who are a subset of healthcare architects who play a valuable role in design collaboration with medical equipment planners.
- **Valerie Lynch** – Architects are incredibly valuable to the process, but often times they only deal with ASE (architecturally significant equipment) and the minor equipment gets "lost." In my experience, if there is a dedicated planner within the architects team it works OK, but that's a lot for one architect to handle. There are a lot of details and important conversations that need to be had just for the sake of the equipment.

Q: Does your in-house equipment planning team produce equipment drawings or are they typically drawn by your architect partners?

- **Paula Cleaver** – I think it depends on the capacity and tools the in-house staff has available. Revit drawings are a complicated process and takes a lot of coordination and time. When I was in-house we let the architects do the equipment placement.
- **Valerie Lynch** – I think it depends on the project, the org, and the architect team. I've seen it done in many combinations. Typically when I was in-house I would provide the details to the architect team, but when I was a consultant we provided the equip drawings as part of our deliverable package.

Q: What if the end user is not knowledgeable of new equipment -- does the EP recommend using new equipment?

- **Paula Cleaver** – The medical equipment planner's role is to be aware of new technologies and should be able to suggest new equipment or upcoming technologies coming to market.
- **Valerie Lynch** – I would venture to say there is someone within the organization who is knowledgeable about the equipment, even if they aren't directly involved in the project, for example clinical engineering or biomed. I would continue to dig and find someone within the organization who has that level of detail or who has the decision-making power to authorize new equipment in the budget or make the call to re-use what they have. As a last-ditch effort, I would attempt to bring in the vendor of the equipment to do an analysis on the existing equipment or use Attainia to do a useful life analysis on the existing equipment to take to the users for them to make a decision. But I would always be prepared with the new technology or vendor details for replacement equipment for the team to review.



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Q: How do you go about identifying all of the questions that need to be asked/answered with DDs/CDs/user group meetings?

- **Paula Cleaver** – Healthcare projects tend to follow similar sets of discussions. When we are in meetings we prepare by understanding the project scope, the program that was developed and the design and clinical intent. We are research-intensive people who like to know how things work. The more experience an equipment planner has, the more we put in our toolbox for the next projects.
- **Valerie Lynch** – Listening to the needs of the users, the architects, the engineers, the project manager, the construction manager. There are a core set of questions that will arise in the beginning as the project is in its early phases, but after that it's understanding what the other project stakeholders need and the priority of those needs help drive the questions to ensure that all stakeholder needs are incorporated. It goes beyond “how much is this going to cost,” and “what model do you want.” Every stakeholder needs a different bit of info from the equipment planner from cost detail, to spec details to location details. The more projects that you are a part of in any capacity you'll start to see how the projects unfold and how the equipment planner gathers details from EVERY conversation.

ABOUT ATTAINIA

Attainia PLAN-IT is the premier collaboration software platform that automates, accelerates and optimizes medical equipment planning. Used by more than 1,000 member hospitals, Attainia makes planning new construction, expansion and renovation projects easy. With more than 1,400 pre-built department and room templates, and more than 66,000 products in our exclusive integrated supplier catalog, equipment planning time can be reduced by as much as 75% (when compared to using manual spreadsheet-based processes). For more information about the Attainia PLAN-IT platform, or to see a customized demo for your organization, send a request to moreinfo@attainia.com.