



Asset Onboarding Procedure

1. Guiding Principles

The WA Country Health Services (WACHS) Asset Management System AGILITY is used to record the asset management activity of each asset. Asset Management is the process of planning, purchasing, operating, maintaining and disposing of assets in a low risk, cost effective manner.

The Asset Onboarding Procedure is the process for bringing new assets into AGILITY. It captures the purchasing phase and demonstrates the processes required when onboarding (and offboarding) assets across all WACHS sites. It provides a consistent and detailed approach, including procurement, delivery, receipting, commission and acceptance of assets and is pursuant of [MP 0161/21 - Procurement and Contract Management Policy](#) and [WACHS Strategic Asset Plan 2019-2029](#)

In-scope assets: Buildings, plant and equipment, furniture and fixtures medical equipment, and patient care equipment necessary for WACHS to deliver and report on its services.

Out of scope assets: Information and Communications Technology (ICT) equipment; and leased staff accommodation.

A standardised asset onboarding process is required to:

- ensure the asset information is captured in AGILITY from the time the asset is procured
- ensure a record of all asset management activities for the duration of the assets lifecycle to its useful economic life (UEL) is maintained
- enable consistent reporting across the business.

Assets recorded in AGILITY allows WACHS to quantify and qualify the management, maintenance and associated costs in the asset's lifecycle and replacement, including:

- reporting asset management activity and service history to meet legislative requirements.
- maintenance planning and scheduling of work tasks to the asset
- budgeting information required when planning to replace assets
- asset reliability by monitoring asset conditioning on its approach the end of its useful life;
- manufacturer information required for asset replacements in the absence of supplier information; and
- liability period by monitoring the asset warranty period.

2. Procedure

Whilst WACHS assets can be purchased by various methods (Purchase Card, iProcurement, capital works projects, Medical Equipment Replacement Fund) standardised procurement and asset management processes should be followed for below asset types.

- General Assets
- Capital Projects Assets
- Medical Equipment
- Patient Care Equipment

3.1 General – Building; Plant and Machinery; Furniture, Fixtures and Fittings (FF&E)

Asset Onboarding Process		
Step	Responsible Person	Process
1	Regional Manager Infrastructure Support Service (ReMISS)/ Responsible person	<ul style="list-style-type: none"> • Conduct procurement process in line with MP 0161/21 - Procurement and Contract Management Policy and WA Health Financial Management Manual (FMM). • Advise Site Asset Officer of pending asset arrival through AGILITY Request • Provide make, model, serial number, supplier warranty, purchase price and warranty period (if known) Add an Asset to Agility
2	ReMISS/Responsible person	<ul style="list-style-type: none"> • Conduct IProc purchase order process is initiated- link via Work Order number
3	Site Asset Officer/Responsible person	<ul style="list-style-type: none"> • Asset received by region, confirm receipt of asset, ensure details entered into Agility system, including location and record Asset Identifier (ID) - Add an Asset to Agility
4	Site Asset System Officer/ Responsible person	<ul style="list-style-type: none"> • Create label and tag asset - Asset Labelling & Printing
4	Site Maintenance Officer/Responsible person	<ul style="list-style-type: none"> • Compliance testing performed. Test and Tag required for electrical assets - Process for Asset Tagging/Labelling
5	Site Maintenance Officer/ Responsible person	<ul style="list-style-type: none"> • Planned Preventative Maintenance (PPM schedule created (as per manufacturers instruction) & attached to asset ID - Planned Preventative Maintenance Work Instruction). • Deployed into Functional area/room for use
7	Service Area i.e. Clinical lead/ Admin Manager	<ul style="list-style-type: none"> • Monitor performance/ report issues via AGILITY Request

Asset Offboarding Process		
8	Site Maintenance Officer/Responsible person	<ul style="list-style-type: none"> Offboarding assets that are: lost, damaged (beyond repair), transferred assets - Off-boarding an Asset in Agility.
Asset Disposal		
9	ReMISS/Responsible person	<ul style="list-style-type: none"> Asset disposal process: complete FA04 – Transfer and Disposal of Fixed Assets.

3.2 Capital Projects – Building; Plant and Machinery; Furniture Fixtures and Fittings (FF&E)

Asset Onboarding Process		
Step	Responsible Person	Process
1	Capital Project Officer/Responsible person	Coordinate AGILITY Upload Template <ul style="list-style-type: none"> Contact central Infrastructure for latest AGILITY Upload Template. Forward to Regional Manager Infrastructure Support Service (ReMISS)/Responsible person to populate site asset folder structure Agility Bulk Upload Template. Provide contractor with AGILITY Upload Template- with folder structure (as indicated above).
2	Capital Project Officer/Responsible person	For Group 1 Items <ul style="list-style-type: none"> Contractor procure and install within project. Provide location, make, model, serial number, supplier warranty, purchase price and warranty period via AGILITY Upload. Receive template and validate data provided by builders and contractors. Forward to central Infrastructure for review.
3	Central Infrastructure/ Asset Manager	<ul style="list-style-type: none"> Confirm receipt of Template and timeframe for data review/ and progression to HSS for system upload. Central office, Reporting & Systems team run data validation syntax. Central office coordinate data Upload by HSS. Confirm when upload is complete.
4	ReMISS/Responsible person	Check data upload- confirm ok or advise where corrections are required

5	Capital Project Officer/Responsible person	<p>For Group 2 and 3 Items</p> <ul style="list-style-type: none"> Project Team procure within project FF&E process/budget Procurement process conducted in line with MP 0161/21 - Procurement and Contract Management Policy and WACHS Strategic Asset Management Plan Provide location, make, model, serial number, supplier warranty, purchase price and warranty period via AGILITY Upload Template Receive Template and check data for accuracy Forward to central Infrastructure for review
6	Central Infrastructure/ Asset Manager	<ul style="list-style-type: none"> Confirm receipt of Template and timeframe for data review/ and progression to HSS for system upload Central office, Reporting & Systems team run data validation syntax Central office coordinate data Upload by HSS Confirm when upload is complete
7	ReMISS/Responsible person	<ul style="list-style-type: none"> Check data upload- confirm ok or advise where corrections are required
8	Site Maintenance Officer/Responsible person	<ul style="list-style-type: none"> Create label and tag asset - Asset Labelling & Printing
9	Site Maintenance Officer/Responsible person	<ul style="list-style-type: none"> Compliance testing performed. Test and Tag required for electrical assets - Process for Asset Tagging/Labelling
10	Site Maintenance Officer/ Responsible person	<ul style="list-style-type: none"> Planned Maintenance schedule created (as per manufacturers instruction) & attached to asset Identifier (ID) - Planned Preventative Maintenance Work Instruction. Deployed into Functional area/room for use
11	Service Area i.e. Clinical lead/ Admin Manager	<ul style="list-style-type: none"> Monitor performance/ report issues via AGILITY Request
Asset Offboarding Process		
12	Site Maintenance Officer/Responsible person	<ul style="list-style-type: none"> Offboarding assets that are: lost, damaged (beyond repair), transferred assets - Off-boarding an Asset in Agility
Asset Disposal		
13	ReMISS/Responsible person	<ul style="list-style-type: none"> Asset disposal process: complete FA04 - Transfer and Disposal of Assets

3.3 Clinical/Medical Equipment – Biomedical Equipment

Asset Onboarding Process		
Step	Responsible Person	Process
1	Procurement /Responsible person	<ul style="list-style-type: none"> Procurement process conducted in line with WACHS Medical Equipment Procurement Policy. Advise Site Asset Officer of pending equipment arrival through AGILITY Request Provide make, model, serial number, supplier warranty, purchase price and warranty period (if known) Adding an Asset to Agility (checklist)
2	Site Asset Officer/ Responsible person	<ul style="list-style-type: none"> Advise Biomedical Engineering (BME) of new asset Identifier (ID), information and planned arrival date at BME for testing, via iProc process
3	Biomedical Engineering / EMed Coordinator	<ul style="list-style-type: none"> Create asset in AGILITY using provided information Asset commissioned by BME, details entered into E-med system and updated in AGILITY Asset maintenance instruction provided to Central Infrastructure to create Planned Preventative Maintenance (PPM) (if required)
4	Biomedical Technician	<ul style="list-style-type: none"> Compliance testing performed- Test and Tag (electrical assets) Asset sent to site, site advised of arrival date and AGILITY and eMed IDs
5	Central Infrastructure/ Asset Team	<ul style="list-style-type: none"> Create PPM schedule to include Maintenance Task List (MTL), Operations Equipment Manual (OEM), Australian Standards/New Zealand Standards (AS/NZS) Advise site when PPM available to be added to asset
6	Regional Maintenance Team /Responsible person	<ul style="list-style-type: none"> Asset commissioned to site, including AGILITY asset ID and label Planned Maintenance (as per manufacturers instruction) attached to asset ID - Planned Preventative Maintenance Work Instruction., service schedule created Deployed into Functional area/room for use
7	Clinical Area/ Responsible person	<ul style="list-style-type: none"> Use of equipment as per manufacture instructions

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		<ul style="list-style-type: none"> Report performance issues using AGILITY Request (link)
Asset Offboarding Process		
8	Regional Maintenance Team /Responsible person	<ul style="list-style-type: none"> Offboarding asset that is lost, damaged (beyond repair), transferred – Off-boarding an Asset in Agility
Asset Disposal		
9	Regional Manager Infrastructure Support Service (ReMISS/Responsible person)	<ul style="list-style-type: none"> Asset disposal process: complete FA04 Transfer and Disposal of Assets.

3.4 Patient Care Equipment – Non - Bio Medical Equipment

Asset Onboarding Process		
Step	Responsible Person	Process
1	Clinical Procurement /Responsible person	<ul style="list-style-type: none"> Procurement process conducted in line with Medical Equipment Procurement Policy. Advise Site Asset Officer of pending equipment arrival through AGILITY Request Raise an Agility work order Provide make, model, serial number, supplier warranty, purchase price and warranty period (if known) IProc purchase order process is initiated, link via Work Order number
3	Site Asset Officer/ Responsible person	<ul style="list-style-type: none"> Asset Onboarded by region, details entered into Agility system - How to add an Asset into Agility
4	Site Asset Officer/ Responsible person	<ul style="list-style-type: none"> Create label and tag asset - Asset Labelling & Printing
4	Regional Maintenance Team /Responsible person	<ul style="list-style-type: none"> Compliance testing performed. Test and Tag required for electrical assets - Process for Asset Tagging/Labelling
5	Regional Maintenance Team /Responsible person	<ul style="list-style-type: none"> Planned Preventative Maintenance (PPM) schedule created (as per manufacturers instruction) & attached to asset Identifier (ID) - Planned Preventative Maintenance Work Instruction). Deployed into Functional area/room for use

7	Clinical Area/ Responsible person	<ul style="list-style-type: none"> • Use of equipment as per manufacture instructions • Report performance issues using AGILITY Request Raise an Agility work order
Asset Offboarding Process		
8	Regional Maintenance Team /Responsible person	<ul style="list-style-type: none"> • Offboarding asset that is lost, damaged (beyond repair), transferred – Off-boarding an Asset in Agility
Asset Disposal		
9	Regional Manager Infrastructure Support Service (ReMISS)/Responsible person	<ul style="list-style-type: none"> • Asset disposal process: complete FA04 - S734 FMM - Transfer and Disposal of Assets.

3. Roles and Responsibilities

Central Infrastructure/ Asset Manager is responsible for:

- oversight of Asset Onboarding process
- quality Assurance of AGILITY data (validation of asset information)
- asset reporting & forecasting (whole of life)
- providing regions with Asset Code range for AGILITY Bulk Upload Template (unique identifier).

Central Infrastructure/ Reporting & Systems Manager is responsible for:

- oversight of WACHS-wide AGILITY system performance and reporting
- asset performance (work orders)
- forecasting on active assets
- maturity & maintenance of asset data
- disposed, decommissioned, obsolete assets.

Regional Procurement /Responsible person is responsible for:

- sourcing assets by clarifying the asset specification, budget source and approvals
- conducting procurement process in line with WACHS Procurement Policy and WA Health FMM
- advising Site Asset Officer of pending asset arrival through [AGILITY Request](#)
- providing make, model, serial number, supplier warranty, purchase price, date of purchase and warranty period (if known) process.

Coordinator Bio electromedical is responsible for onboarding Medical equipment including adding the asset into E-med system. This includes asset testing and tagging before deploying to site.

Medical Equipment Replacement Person (MERP) is responsible for procurement of MERP priorities.

Clinical / NUM is responsible for:

- procurement choice for Medical/Patient Care equipment
- use of equipment as per manufacture instructions
- reporting performance issues using [AGILITY Request](#).

Capital Project Officer / Responsible Person is responsible for:

- coordinating AGILITY Bulk Upload Template I.e. Site maintenance, Furniture Fixtures and Equipment and Contractor data inputs
- ensuring all New Build assets information is forwarded to Central Infrastructure for uploading to AGILITY.

Regional Manager Infrastructure Support Service (ReMISS) is responsible for asset management at a regional level:

- asset onboarding process
- quality assurance of AGILITY data
- asset reporting & forecasting (whole of life)
- asset Planned Preventative Maintenance (PPM) performance (work orders)
- forecasting on active assets
- maturity & maintenance of asset data
- notifying Central Office of assets to be disposed, decommissioned and/or obsolescence of assets.

Regional Maintenance Team /Responsible person is responsible for asset management at a site level including:

- performance of asset compliance testing. Testing and Tagging is required for electrical assets
- creation of planned maintenance schedules (as per manufacturers instruction) & attachment to asset Identifier (ID) offboarding assets that are lost, damaged (beyond repair) or transferred.

Site Asset (AGILITY) Officer/ Responsible person is responsible for:

- asset onboarding, and entering details into the Agility system
- creating labels and tagging assets.

4. Compliance

This procedure is governed by the [Health Services Act 2016](#).

Failure to comply with this procedure may constitute a breach of the WA Health Code of Conduct (Code). The Code is part of the [Integrity Policy Framework](#) issued pursuant to section 26 of the [Health Services Act 2016](#) (WA) and is binding on all WACHS staff which for this purpose includes trainees, students, volunteers, researchers, contractors for service (including all visiting health professionals and agency staff) and persons delivering training or education within WACHS.

WACHS staff are reminded that compliance with all policies is mandatory.

5. Records Management

All WACHS corporate records must be stored in the approved Electronic Documents and Records Management System. Refer to [Records Management Policy](#).

All WACHS clinical records must be managed in accordance with [Health Record Management Policy](#).

All WACHS asset records, including medical and patient care equipment, must be stored in the approved Asset Management System (AGILITY). Asset service records must also be recorded in AGILITY in line with appropriate Australian/ New Zealand Standards.

6. Evaluation

Monitoring of compliance with this document is to be carried out by Central Infrastructure Asset Manager, every 12 months using the following means or tools:

- AGILITY performance reporting
- Validation exercise of assets added into AGILITY
- Consultation with Regional Manager Infrastructure Support Service

7. Standards

[National Safety and Quality Health Service Standards – 1.07, 1.08, 1.25](#)
[AS/NZS 3551:2012 Management Programs for Medical Equipment](#). – S4, S5

8. Legislation

[Work Health and Safety Act 2020](#)
[Work Health and Safety \(General\) Regulations 2022](#)
[Financial Management Act 2006](#)

9. References

[ISO 31000:2009, Risk Management – Principles and Guidelines](#)
[AS/NZS 4536:1999 Life Cycle Costing – An Application Guide](#)
[Australian regulatory guidelines for medical devices](#)
[Medical Equipment Asset Management Framework](#)
[Guidelines](#). Cited November 2022.
[ISO 55000:2014, Asset Management - Overview, principles and terminology](#)
[ISO 55001:2014, Asset Management - Management systems – Requirements](#)
[ISO 55002:2014, Asset Management - Guidelines for the application of ISO 55001](#)
[ISO 9001:2008, Quality Management Systems - Requirements](#)
[WACHS Agility Planned Preventative Maintenance](#)
[Agility Workflow Instructions version 1.4](#)
[WACHS Asset Management System \(AGILITY\) Business Rules](#)
Department of Finance [Guidelines for “buying for government”](#)

10. Related Forms

HSS Forms

- FA01 – Asset Addition
- FA02 – Asset Transfer/Maintenance
- FA03 – Bulk Asset Transfer
- FA04 – Asset Disposal/Asset Write Off
- FA04B – Bulk Asset Disposal/Write Off

11. Related Policy Documents

- WACHS [Management of Medical Equipment Policy](#)
- WA Government [Strategic Asset Management Framework](#)
- WA Health [Facilities Guidelines for Engineering Services](#)
- WA Health [Financial Management Manual \(FMM\)](#) – Chapter 7: Asset Management

12. Related WA Health System Mandatory Policies

- MP 0109/19 – [Asset Management Strategic Asset Plan Policy](#)
- MP 0110/19 – [Management of Medical Equipment Policy](#)

13. Policy Framework

- [Infrastructure \(Asset Management\) Policy Framework](#)

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Contact:	Asset Manager, Infrastructure		
Directorate:	Infrastructure and Environment	EDRMS Record #	ED-CO-22-381046
Version:	1.00	Date Published:	5 December 2022

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