



TheWorxHub (Senior Living): Compliance Dashboard Pre-Release Guidance

With the release of our new compliance dashboard, below are some recommended guidelines to ensure your data is in good condition to be able to take full advantage of this exciting new feature!

1. Utilize the **Is Compliance Related** checkbox if the work will be performed to fulfill a compliance requirement. Check this box on all relevant Work Orders, Scheduled Work Orders, and Templates for any of the TheWorxHub applications you own. **Note: The Is Compliance Related box is only visible for users with the Can See Compliance Checkbox permission in [Users' Roles & Permissions](#) under the Work Orders section in Settings.*

The screenshot shows the 'New Work Order' form with the following fields and sections:

- General Info:**
 - Application: Maintenance
 - Priority: [Select]
 - Location: [Begin typing to select a location]
 - Description: [Pick Template]
 - Due Date: 5/15/2023
 - Appt Start: []
 - Appt End: []
 - Subscribe to email updates: []
- Task List:** (Tasks Completed: 0 of 0)
- Category:** [Select]
- Subcategory:** Select a Work Order Ca...
- Source of Work:** [Select]
- Requestor:** []
- Requestor Phone:** []
- Is Compliance Related:** (highlighted with a red box)

Buttons: Save, Print Work Order, Cancel

2. Make sure the assets that you have added are linked to corresponding Work Orders and Scheduled Work Orders. **Note: Also, be sure to unlink retired assets from your active compliance-related Scheduled Work Orders.*

Work Order

Electrical Emergency Generators

Source of Work Requestor

PM Requestor Phone

Is Compliance Related

Save Print Work Order Cancel

This Work Order was generated from the Sched WO Generator (Fixed) - Weekly

Add this WO to a project


Labor: 1 assigned (Eric Bacon)

Inventory: No items assigned

Asset: 1 asset selected (HOS-GEN-001)

Link Assets

Assigned Assets

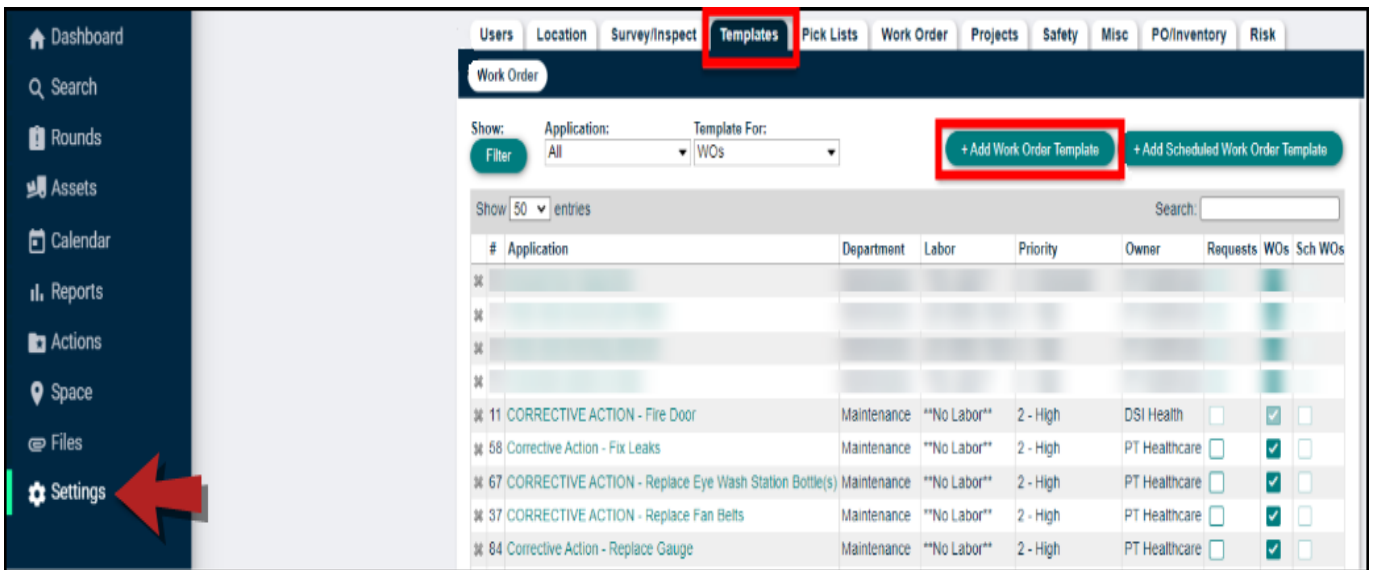
 **16 - HOS-GEN-001**
Location: Hospital > Grounds
Manufacturer: Generac Model: QT15068ANAC Tag: G-123
Age: 17 yrs Serial#: 4548654152452
Barcode#: 489400004328
Asset Details: Manual attached
serviced by GE

Unlink

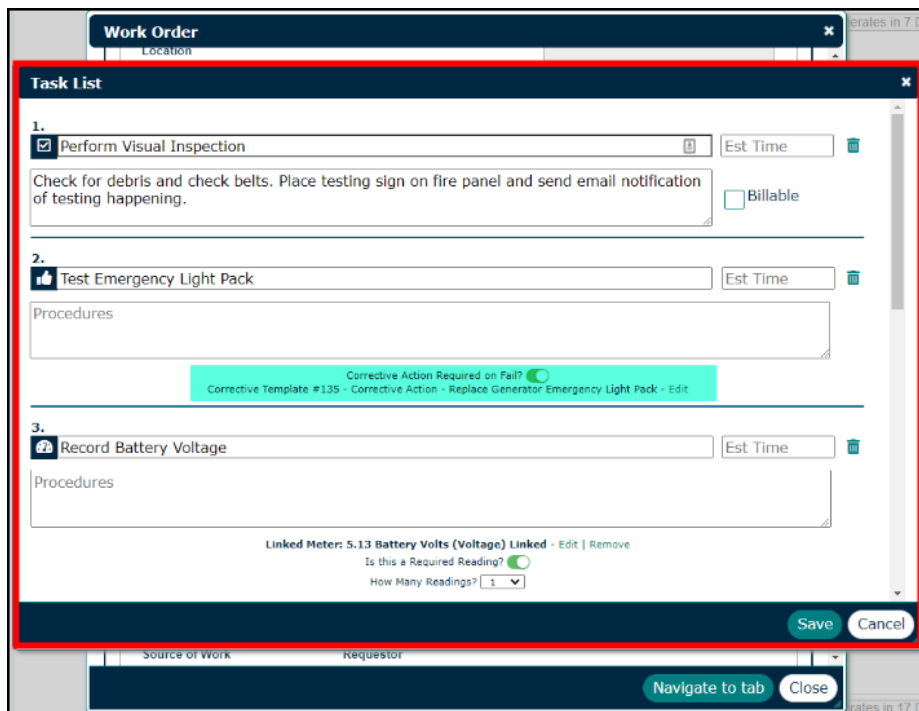
Navigate to tab Close

3. Take advantage of the **Pass/Fail** task list type to link templates that will generate corrective actions upon failure.

- Step 1: Create the necessary corrective action templates.



- Step 2: Add or adjust the task list on your Scheduled Work Orders.



- Step 3: When there is a failure, a work order will be generated to correct the issue.

