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WHITE PAPER

# From Work Orders to Readiness

Automating Physical Environment Compliance for Healthcare Facilities

*How integrated work order, permit, rounding, and life-safety workflows move facilities teams from reactive “fix it” mode to proactive, survey-ready operations—reducing manual effort, improving front-line efficiency, and giving leadership real-time visibility into readiness.*

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**Manage Your Facilities with Confidence**

## Executive Summary

Healthcare facilities teams carry a heavy and growing load: aging infrastructure, lean staffing, competing capital priorities, and the standing expectation that the physical environment remains safe, compliant, and survey-ready every day of the year. The knowledge to meet that expectation is rarely the problem. Your safety, compliance, and engineering leaders know the standards. The problem is operational—the work of detecting an issue, turning it into action, completing it, and proving it lives across disconnected tools that were never designed to talk to one another.

Tours and tracers are captured on paper or in a standalone app. Work orders sit in a CMMS. Permits move through email and PDFs. Fire drills and life-safety checks live in someone's calendar and a spreadsheet. Each tool does its job, but the seams between them are where readiness leaks out—findings that never become work, work that closes without a clear record, and a survey season that turns into a manual scramble to reassemble a story that should already exist.

The path to consistent readiness is not another point solution, but an integrated, automated workflow that connects rounding, work orders, permits, life safety, and asset management into one operating system. When those activities share a single platform, compliance stops being a periodic project and becomes a continuous, visible state of operations—less manual effort for the front line, faster closure of real risk, and real-time confidence for leadership.

## 1. The Readiness Gap in Healthcare Facilities

### Fragmented Systems, Manual Workarounds

Most PE and facilities teams recognize the same pattern of disconnected systems:

- **Tours and Rounds** captured on paper or in an app that doesn't feed the work order system.
- **Permits & Risk Assessments** handled by email and PDFs, with little visibility into who approved what, for which location, under which conditions.

- **Fire Drills, Life-Safety Checks, and Utility Shutdowns** tracked in individual calendars and spreadsheets.
- **Assets and Inventory** managed in a CMMS that is disconnected from PE findings and leadership dashboards.

Each tool serves a purpose, but the lack of connection between them creates friction at every handoff. Findings do not reliably become trackable work. Work orders close without a clear link to the requirement that prompted them. And leadership has to pull from several sources, by hand, to assemble a single view before a survey.

### The Operational and Cultural Cost

When the workflow is fragmented, the cost shows up everywhere. Staff spend more time chasing information than resolving risk. Department leaders experience compliance as a “season” rather than an ongoing discipline. Technicians feel survey prep as a stressful, all-hands event instead of validation of work they’ve done well all year. And executives lack a single, trustworthy view of risk across campuses, buildings, and systems.

This is the readiness gap, and it is worth naming precisely: it is not a knowledge gap. It is a workflow gap. Closing it means treating PE activities not as separate projects but as one continuous, connected process—and removing the manual steps between detection, action, and proof.

## 2. Designing an Integrated PE Workflow

An integrated approach to physical environment compliance connects five key areas of facilities operations that many organizations manage separately today. The point is not to replace the expertise behind each one, but to put them on shared rails so information moves automatically from where it’s found to where it’s fixed to where it’s recorded.

- **Tours and Rounds** — The front door, where issues are detected.
- **Work Orders** — The engine, where remediation happens.
- **Permits & Project Risk Assessments** — The controlled gateway for higher-risk work.
- **Fire and Life Safety** — The governed calendar of recurring obligations.

- **Assets and Inventory** — The backbone that ties work to specific equipment and systems.

### **Tours as the Front Door**

Rounding is the frontline mechanism for catching issues before a surveyor does. In an integrated model, tour forms are digital and standardized, with consistent fields for location, category, and severity. A finding can generate a work order directly—or attach to an existing one—instead of being transcribed by hand later. Every deficiency becomes actionable and traceable the moment it's recorded, with no extra administrative step.

### **Work Orders as the Engine**

Work orders are where the fix actually happens, so the workflow should make them easy to complete and easy to trust. Work order types can mirror the risk categories your program already uses, required fields can capture corrective action and completion evidence rather than just a “done” flag, and every order can link back to the finding, permit, or event that triggered it. When you can show that each issue moved through a structured lifecycle to closure, a survey becomes a demonstration of process rather than a hunt for documentation.

### **Permits as a Controlled Gateway**

Above-ceiling work, hot work, and construction activity are common sources of risk, and they benefit most from structure. A digital permit workflow provides role-based request forms for contractors and staff, routes approvals to the right reviewers with clear turnaround expectations, carries the required conditions on the permit record itself, generates work orders when field work or inspection is needed, and captures closeout evidence against both the permit and any related orders. The result is simple visibility into where high-risk work is happening and whether the agreed safeguards were actually followed.

### **PCRA, ICRA, and ILSM Assessments**

Construction and renovation work in a healthcare setting rarely travels alone. It's typically led by a related set of assessments—a Pre-Construction Risk Assessment (PCRA), an Infection Control Risk Assessment (ICRA), and, when life safety systems are affected, a review of Interim Life Safety Measures (ILSM). In most facilities today,

these assessments are completed on separate forms, by separate teams, on a separate timeline from the permit itself—which makes it easy for a project to move forward before every assessment has actually caught up to it.

The fix is structural, not procedural: build PCRA, ICRA, and ILSM into the same workflow as the permit, rather than alongside it. A project request can trigger the relevant assessments automatically based on scope and location, route each one to the appropriate reviewer (infection prevention, life safety, engineering) in parallel with permit approval, and hold the permit open until its required assessments are complete. Any interim measure the assessment calls for—temporary barriers, signage, monitoring rounds, alternate egress—can generate its own tracked task rather than living in a margin note, and every assessment, approval, and follow-up action stays attached to the same project record.

This is intentionally a workflow description, not a compliance one. Your infection prevention, life safety, and project teams define what each assessment requires and when it's triggered. The platform's job is narrower and more mechanical—make sure the right assessments happen, reach the appropriate reviewers, generate the work they imply, and leave a complete, time-stamped record associated with the project.

### **Fire and Life Safety as a Governed Calendar**

Drills, generator tests, and life-safety inspections often live in scattered calendars, which is exactly how they get missed. Centralizing them in a single scheduling engine—with rules by building and area, automated reminders to the responsible owners, simple mobile completion capture, and automatic follow-up work orders for anything that fails—turns a manually coordinated effort into a governed, auditable record of what was planned, performed, and resolved.

### **Assets and Inventory as the Backbone**

Finally, assets connect PE work to the specific equipment behind it. When asset records carry location, classification, and PM schedules, preventive work auto-generates with standardized checklists, and deficiencies found during PMs flow straight back to the same dashboards as everything else, leaders can answer not

only “Did we fix it?” but “Are we consistently maintaining the systems that keep it from happening again?”

### **3. Automation That Actually Helps the Front Line**

Effective workflow automation does three things: It eliminates duplicate data entry, routes the right work to the right person, and makes documentation a natural by-product of completing the work.

#### **Eliminating Swivel Chair Work**

The single biggest source of wasted effort is re-keying the same information across systems. The fixes are practical: one-click conversion from a finding to a work order, automatic population of location, building, asset, and category data, and integrations with the CMMS and building automation systems so alerts and alarms can open or update work orders without anyone retyping anything. Beyond the time saved, this removes the transcription errors and dropped issues that fragmented workflows quietly produce.

#### **Smart Routing and Escalation**

Automation should also make sure the right work reaches the right person at the right priority—rules-based routing by location, trade, and severity; automatic escalation when a high-priority item isn’t acknowledged or completed in time; and role-specific notifications, so technicians get tasks while leaders get summaries and exceptions. Encoding these rules into the workflow replaces individual heroics with a consistent, repeatable response to risk.

#### **Capturing Evidence Without Extra Steps**

Regulators want to see not just that work was completed, but that it was completed correctly. Mobile workflows that make it easy to attach photos, checklists, and readings at the point of work—and dashboards that drill from a high-level finding down to the exact order and its evidence—mean survey readiness accumulates as a natural output of everyday work instead of a separate documentation project.

## 4. Real-World Implementation Patterns

Every facility is different, but a few implementation patterns deliver value consistently. Each can be adapted to organizations of different sizes and levels of maturity, and each can begin as a focused, phased rollout rather than a rip-and-replace.

### Pattern 1 — Unifying Permits, Work Orders, and Project Assessments

Problem: permits and construction impacts were tracked in email and spreadsheets, PCRA/ICRA/ILSM assessments lived on separate forms with separate owners, and related deficiencies sat in yet another work order system—leaving leadership without a single view of high-risk work.

Approach: a single digital request for above-ceiling, hot work, and construction; automatic triggering of the relevant PCRA, ICRA, and ILSM assessments based on scope and location; parallel approval routing to the right reviewers; automatic work orders for pre-work inspection, interim measures, in-progress checks, and closeout; and every related assessment, order, and document linked back to the original permit.

Outcome: a clear chain from request to assessment to safeguard to execution to clearance—so an audit can show not just that work happened, but that every required review and interim measure happened with it, on the record.

### Pattern 2 — Tours That Drive Actionable Work

Problem: tours found issues, but findings sat in reports that didn't reliably become work orders. The same problems recurred, and leaders had little visibility into closure rates.

Approach: standardized tour forms with consistent categories and severities; one-click work order creation pre-filled with location and detail; a deficiency lifecycle view by building, service line, and category; and target turnaround times with escalation for high-severity items.

Outcome: tour findings became a prioritized work queue instead of a static report. Closure rates improved visibly, and staff saw that the issues they raised were tracked and resolved—which is exactly what reinforces a safety culture.

### Pattern 3 — Governing Fire and Life Safety Schedules

**Problem:** drill schedules, generator tests, and safety checks were spread across calendar invites and local spreadsheets, so a missed or late event was only discovered during an internal audit—or a survey.

**Approach:** centralize all life-safety activities in one scheduling module with rules per building and area, auto-generate recurring events assigned to accountable owners, capture completion on mobile, and auto-create follow-up work orders for anything found, linked to the original event.

**Outcome:** a complete, time-stamped record of planned and completed activity and how each deficiency was resolved—greater confidence at survey time and far less manual reconciliation.

## 5. Measuring Success: From Tasks to a Culture of Readiness

Workflow and automation are only half the story. To sustain readiness, leaders need a small set of meaningful metrics and a culture that treats PE work as everyday operational excellence rather than a periodic obligation.

### Metrics Worth Tracking

| Metric                             | What It Tells You                                                        |
|------------------------------------|--------------------------------------------------------------------------|
| <b>Deficiency Closure Time</b>     | Average and median time from a finding or event to a documented closure. |
| <b>Pre-Survey Remediation Rate</b> | Share of findings resolved before an internal audit or external survey.  |
| <b>Throughput Balance</b>          | Open vs. completed work orders by trade, building, and category.         |
| <b>Process Adherence</b>           | Share of high-risk work that moved through the formal permit process.    |
| <b>Manual Tools Retired</b>        | Number of legacy spreadsheets and offline trackers eliminated.           |

These move the conversation from anecdote (“we’re really busy”) to evidence (“we cut high-risk closure time by 30% in six months and retired nine spreadsheets”).

They're also operational measures a facilities leader can own and act on directly—independent of any survey score.

## Leading with Culture, Not Just Controls

Systems can enforce a process, but leaders shape the culture around it. Readiness sticks when leaders celebrate progress rather than only perfection—recognizing teams that improve closure times or adopt new workflows quickly—and when PE work is framed as patient safety and operational excellence rather than “avoiding citations.” When the tools visibly help people do their jobs instead of just documenting them, staff stop preparing for surveys and start operating in a state of readiness every day.

## Conclusion

Facilities teams are under real pressure, but they are also better positioned than ever to connect the work they already do. The organizations that pull ahead will be the ones that stop treating PE compliance as a recurring project and start running it as a continuous, data-driven, people-centered process—one platform carrying rounding, permits, work orders, life safety, and assets end to end.

Unify the workflow, automate the right touchpoints, and measure what matters, and a facilities organization moves from reactive to proactive: from chasing findings to demonstrating, on any given day, a culture of safety and readiness.

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## About the Author

**Amanda Haviland** is the Director of Implementation at Soleran, where she leads healthcare software implementation programs and helps organizations translate complex operational requirements into practical, sustainable solutions. With extensive experience working alongside healthcare facilities teams, Amanda understands the importance of thoughtful planning, effective change management, and strong collaboration throughout the implementation process. She is passionate about helping hospitals improve adoption, standardize critical workflows, and achieve lasting improvements in safety, compliance, and operational performance.

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## About Soleran

Soleran helps healthcare organizations manage their facilities with confidence—bringing rounding, work orders, permits, life safety, and asset management onto one platform built for the realities of the Physical Environment. By connecting the work and automating the steps between detection, action, and proof, Soleran turns compliance from a periodic scramble into an everyday operating strength.

## Manage Your Facilities with Confidence