



How to Troubleshoot Entries in the PM Hot List that Should or Should Not Appear

I. **PM listed as due when it should not be**

1. *In the Equipment Table | PM Schedules tab, verify:*
 - i. The Meter to Use has a valid Usage Interval, if used
 - ii. The Last Completed On date has a Valid Day Interval, if used
 - iii. The Update More Frequent box is checked if it should be
 - *If there is a less frequent service that should update the schedule of a more frequent service, the Update More Frequent box should be checked for both the less frequent service as well as the more frequent service*
2. *Run an Equipment Snapshot Repair History*
3. *Sort the Repair History by Repair Date and verify a recent Repair Order has been posted for the correct Group-System code*
 - i. Note the Repair Order number
4. *Access Repair Order Entry*
5. *Find the Repair Order number noted and verify that the Repair Order:*
 - i. Has a higher Meter Reading than that equipment's PM Schedule Last Reading
6. *Find the Repair Order Detail Entry and verify:*
 - i. The Repair Order job has the correct PM Group-System code assigned to it
 - ii. Has a greater date than that equipment's PM Schedule Last Completed On Date
 - iii. The Record Posted box in the far right section is checked

II. **PM not listed as due when it should be**

1. *In the Equipment Table | PM Schedules tab, verify the following:*
 - i. The Equipment's PM Level Usage Until Due and Days Until Due fit within the Hot List Record Selection criteria set
 - ii. Any row with Usage or Day Intervals entered, also has a PM Level assigned to it
 - iii. There is a Usage Interval entered for all rows if there is a Meter to Use set
 - iv. There is a Day Interval entered for all rows if the PM Level is tracked by days
2. *In the Hotlist from which the equipment is missing, check the filters and verify the equipment's attributes fit the filters set*
3. *In the Hot List Record Selection section, note the criteria set for Days Until Due, Miles Until Due, Hours Until Due, and Other Meter Until Due*
4. *Run an Equipment Snapshot for the equipment not appearing on the list*
5. *In the Repair tab, verify:*
 - i. Sort the Record Posted column in ascending order and verify there are no PM Repairs with unchecked Record Posted boxes
 - ii. If the PM level for that equipment is already assigned to an open, unposted Repair Order for that unit, the PM will not appear on the PM Hot List