

ONE BEST WAY (1BW) - WORKING INSTRUCTION FORM

Process Name:	CareShield Customer Assessment & Facility Walkthrough	Department/Area:	Service / Customer Implementation
Line/Zone/Equipment:	Customer Facility / Privacy Curtain Locations	Shift(s):	☒ All
Effective Date:	7/27/2026	Review Frequency:	☐ 30 Days ☐ Quarterly ☐ Semi-Annual ☒ Annual
Created By:	Nixon Medical	Approved By:	_____Service_____
Document Status:	Final	Program:	CareShield Privacy Curtain Program

PURPOSE (What this 1BW is for)

To define the standard process for assessing a customer facility, identifying every privacy curtain Bay and the number of curtains assigned to each Bay, documenting key customer contacts and access windows, and collecting the information required to plan a successful CareShield installation and future scheduled curtain exchanges.

SAFETY / PPE (Before starting)

Required PPE:	Customer-required PPE and standard Nixon Medical route PPE.
Key Safety Expectations:	Follow all customer safety, infection prevention, security, and restricted-area requirements.

TOOLS / MATERIALS NEEDED

- A copy of/or = electronic version of this One Best Way (1BW)
- Facility floor plan or map, when available
- Tape measure
- Pen or marker
- PDA or tablet, when required
- Required PPE

ONE BEST WAY - STEPS (WHAT + WHY)

Step #	WHAT to Do (Work Step)	WHY (Reason for this step / Risk prevented)
1	Review this 1BW document, known project scope, and available customer information before arrival.	Ensures the assessment begins with a clear understanding of the facility and intended CareShield program scope.
2	Confirm the assessment plan, measuring tools, available facility map, and required PPE are ready before departing.	Prevents delays, incomplete documentation, and repeat visits caused by missing materials.
3	Meet with the designated customer representative and explain the purpose and scope of the assessment.	Establishes expectations and confirms who will support access and answer facility-specific questions.
4	Identify and document the primary customer contacts for the CareShield program, including the appropriate contacts for facility access and service coordination.	Provides clear points of contact for the initial installation and future periodic curtain exchanges.
5	Review customer safety, infection prevention, security, escort, and restricted-area requirements before beginning the walkthrough.	Protects associates, maintains customer compliance, and prevents unauthorized entry.

Step #	WHAT to Do (Work Step)	WHY (Reason for this step / Risk prevented)
6	Walk every department and area included in the CareShield program with the customer representative.	Ensures the assessment covers the full agreed-upon scope and no curtain locations are missed.

ONE BEST WAY - STEPS (CONTINUED)

Step #	WHAT to Do (Work Step)	WHY (Reason for this step / Risk prevented)
7	Identify each privacy curtain Bay and confirm a unique Bay ID.	Creates a consistent location reference for installation, inventory setup, and future service.
8	Document the number of curtain panels assigned to each Bay.	Establishes the correct curtain requirement for every Bay and supports accurate program setup.
9	Create or update a facility map showing each Bay ID and its corresponding location. When permitted by the customer, take a photo of the site map and add it to the PDA for that account.	Provides a clear field reference so future associates can locate the correct Bays without relying on memory, and makes the approved site map available in the account record.
10	Determine and document the number of curtain (s) required for each Bay, including any specialty curtain requirements.	Ensures the correct product is selected and available for the initial installation.
11	Measure mesh height where needed to confirm the correct mesh is on order	Prevents ordering or installing mesh that do not properly fit the location.
12	Inspect the track and related hardware at each Bay and document damaged, missing, or non-standard conditions.	Identifies conditions that could delay or prevent installation and allows issues to be addressed in advance.
13	Identify locations where installation of the mesh track system may require customer-provided ladder access or other site accommodations.	Ensures one-time mesh installation needs are understood before the installation visit. Curtain installation and scheduled exchanges will not require a ladder.
14	Confirm availability and receive permission to use an onsite ladder to install the mesh. Ask to see the ladder for a safety check. If no ladder is available onsite, make arrangements to bring a ladder to the installation.	Confirms safe, approved ladder access is available before installation and prevents delays, unsafe improvisation, or an incomplete mesh installation.
15	Confirm with the customer when the RSR can access each area for the initial installation and scheduled curtain exchanges. Record the preferred service time and any required notification or access instructions.	Reduces failed service attempts and prevents surprises when Nixon Medical arrives to install or exchange curtains.
16	Review: Bay IDs, curtain quantities, mesh requirements, contacts, and access times with the customer representative before leaving.	Confirms the documented information is complete and accurately reflects the customer facility.
17	Communicate the details of the Walkthrough with all parties involved. Sales team, Customer Care, Install team, RSR, service management.	Makes the approved information available for account setup and implementation planning.

QUALITY CHECK (What "GOOD" looks like)

- Every area included in the CareShield program was assessed.
- Every privacy curtain Bay has a unique Bay ID.
- The number of curtain panels assigned to each Bay is documented.
- The facility map shows each Bay ID and its location.
- Mesh sizes, measurements, and specialty requirements are complete.

- Track and hardware conditions are documented.
- Primary customer contacts are documented.
- Preferred access times and any notification or access instructions are documented.
- The customer representative reviewed the completed assessment information.

IF SOMETHING IS NOT RIGHT (Escalation / Help)

- Notify Service Management if facility access prevents a complete assessment.
- Escalate when Bay quantities, mesh requirements, or specialty product needs cannot be confirmed.
- Escalate damaged or non-standard track or hardware conditions that could prevent installation.
- Escalate customer requirements that conflict with Nixon Medical safety or operating standards.
- Do not finalize the assessment when required information remains incomplete or unverified.

TRAINING CONFIRMATION

Trainer:	_____	Date:	___ / ___ / ___
Trainee:	_____	Date:	___ / ___ / ___
Verification:	☐ Demonstrated ☐ Practiced ☐ Verified Competent		