

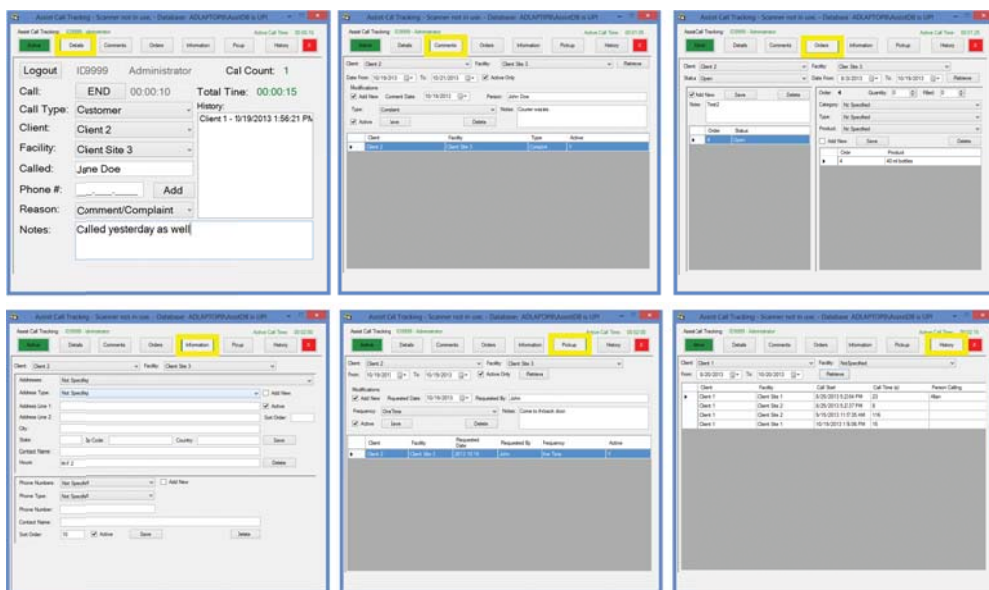
ASSIST TRACKING®

Assist Tracking
Newsletter
September 2013

WHY GAMBLE WITH PATIENT SAFETY?

Featured New Item: Call Tracking/Customer Service Module

Assist has now been expanded to provide expanded tracking functionality to the customer service department. Upon launching the Assist software, a customer service toolbar is displayed. From this toolbar, **seven buttons** are available that allow the Assist screen to increase in size and provide a combination of tools/utilities for the customer service representative.



Using the **Details button**, the client can be specified along with the reason for the call. Notes can be tracked and a call history is shown. The total number of calls handled during the user session along with the total elapsed time are displayed. In a future iteration of this application, this screen will interact directly with the phone switch so that as a call is received, the client will be automatically identified instead of requiring the manual identification of the client by the customer service representative (CSR).

Using the **Comments button**, detailed comments can be recorded by the CSR. A type of comment can also be specified along with the client/facility for which the comments are being captured and the person making the comment. In a future edition of this application, specified comment types will cause emails to be generated.

Continued...

Completed Updates

Call Tracking/Customer Service Module

Employee Scan Log Report

Auto Update Feature

[Read more on pg. 2...](#)

Future Updates

Native Slide Print Routine

Badge Print Routine

Customer Service Phone Switch Interaction

[Read more on pg 4...](#)

Featured New Item: Call Tracking/Customer Service Module (continued)

Using the **Orders button**, the CSR can capture client orders of supplies. The various supply product types and categories can be maintained so that the CSR can place client orders and also have visibility to outstanding orders (i.e. Bottles, Requisitions, etc.). When an order is entered using this utility, it can be shown on the Scoreboard to alert employees in the order fulfillment area (i.e. shipping) to build out the supply order for courier delivery and/or regular shipping. Order fulfillment can be recorded using a screen in the Assist administrative web site. Reports of fulfillment activities are also provided for management to keep abreast of what supplies are going to what client facilities.

Using the **Information button**, the CSR can maintain the addresses and phone numbers for a client. Hours of operation, contact names, etc. can be maintained in this area. This can be served as a “triage” capture of information for new clients/facilities with the detailed information then available for entry into the LIS at a later time.

Using the **Pickup button**, the CSR can capture a request for a courier pickup. This request can generate an email to the appropriate personnel inside the company, or can be displayed on the Assist scoreboard in the logistics department to alert immediately to the need to work in a courier stop. The frequency of the request can be specified along with comments and the employee requesting the stop can be captured. This feature can be used regardless of whether or not the Assist Courier Module is being used by the site.

Using the **History button**, the CSR has visibility to all calls that have been captured by Assist. In a quick glance, the CSR can see exactly how many calls have come into the lab from this client along with the types of calls.

The Assist Scoreboard, as outlined above, has been expanded to include several new views from order fulfillment, to courier stop requests. A call monitor view also exists to show how many calls have been fielded by CSR and the elapsed time spent on the phone by each representative.

Completed Updates: Check out the latest features added to Assist Tracking

- Web Site – Employee Scan Log Report – Created this report to serve as a form of grossing log. It shows the cases scanned by an employee at a data collection point along with counts, number of pieces and totals.
- Web Site – Employee Accession Log Report – Created this report to provide a second method of producing a grossing log that includes just summary lists of accession numbers (down to part number) that passed a specific data collection point for an employee.
- Web Site – Object Type Maintenance – Locked down the object names and ability to add new object types (i.e. Bottles, cassettes, slides, etc.) since this is an administrative (i.e. Assist Team) function. Allowed for the Active Flag and “object called” values. This comes into play with some of the reports that key off of a single object and allows for site customization inside the software.
- Web Site – Added the manufacturing installed flag to the control data table. This lets screens and reports that impact the sites that make use of the manufacturing module to not be cluttered with items that are not relevant.
- Web Site – Employee Task Summary Report – Created this report for sites that make use of the manufacturing module to show what tasks an employee has scanned and get credit for completing.
- Web Site – Comment Type Maintenance – Created this maintenance screen to handle the maintenance of the comment types that appear in the customer service portions of Assist to support customer service recording comments from clients.

- Web Site – Created the Assist Installation History Report – This reports shows detailed information of what version updates have been performed by the auto update feature of Assist. This allows administrators to keep track of what machines have been updated and when.
- Web Site – Pending Auto Update Report – Created this report to show the exceptions of what machines have and have not been updated when using the auto update feature of Assist.
- Equipment Tracking (Check In/Out) Module – Added the auto update feature. This allows the Assist administrator to activate updates to be applied the next time the application is closed/opened. This greatly increases the ease of software administration.
- Accessioning Module – Added the auto update feature as outlined for Equipment Tracking.
- Quality Module - Added the auto update feature as outlined for Equipment Tracking.
- Thermo Slide Point of Use - Added the auto update feature as outlined for Equipment Tracking.
- Web Site – Modified the Security Maintenance screen. Changes were made to allow for a user ID to be flagged as a “verification” user.
- Assist Scanner – Modified to attempt to prevent employees from logging in with a verification badge and leaving themselves logged in by accident. A configurable count can be specified for the number of scans to check when logged in with a verification user ID (as determined with the maintenance change outlined above). Once this number is matched or exceeded, a warning is generated to the user. If they reset past the error, the software will let them stay logged in without any further warning if there is a legitimate reason for the situation.
- Warehouse Module - Added the auto update feature as outlined for Equipment Tracking.
- Distribution Module - Added the auto update feature as outlined for Equipment Tracking.
- Doctor Module - Added the auto update feature as outlined for Equipment Tracking.
- Web Site – Employee Work Statistics – Modified this report to show warehouse slides scanned by employee in addition to blocks.
- Web Site – Warehouse Object Type Maintenance – Modified this screen to include the block and slide flag fields which are used to determine which type of object the data physically represents.
- Web Site – Scan Reclassification – Created a scan reclassification screen. This screen allows for the movement of scan transactions from one user to another and/or from one collection point to another. This is useful if scan transactions are accidentally captured under the wrong code. For example, an employee puts their screen into Recut mode when the scans should have been in Microtomy, or they logged in under the wrong badge for a shift.
- Cassette Queue Viewer - Added MultiBottle and MultiCassette drop downs instead of free form entry fields. Also added a “free form” check box at the bottom of the screen to allow these check boxes to be toggled off to then show free form entry fields.
- Distribution Module - Created an extended void pop up screen that provides the end user with much more control over how and what to void in the distribution screen.

- Assist Scanner - Added the ability to show what queue is being written to if the queue generation at scan time logic is in place. Underneath the scan history screen, the queue for cassettes and/or slides (typically slides) can be shown to remove confusion. This value comes from the queue loader settings table.
- Assist Scanner - Added the “Override Protocol” button to the screen underneath the scan history window. If the configuration indicates that it should show AND slides are being generated by the scan operation, this button allows the user to override the instructions that are associated with the case. This is necessary if, at Accessioning, the incorrect instructions were specified for a case. This will kill unprinted slides and generate new ones.
- Web Site – Print Queue Statistics Report - For sites using the Cassette and slide print queues, this new report shows counts of objects printed. A breakdown of objects printed by user by data collection point can be shown. This lets management get an idea of how many extra cassettes are being printed by grossing as opposed to originally by the accessioning process. It also has a version to show volume by printer (queue) and magazine.
- Warehouse - Added a void pop up screen. If the void bar code is used, all scan transactions for the accession number scanned (at the multi-part level) will be shown in a checked list box ordered by date in descending order. The user can then choose which records to purge.
- Web Site – Block/Slide Instruction Maintenance - Modified this screen to include an active flag on instructions. Also added a slide recipe filter field to allow the instructions drop down to be filtered for grossing and microtomy.
- Web Site – Print Queue Utility - Modified to include the accession number as part of the selection criteria so that individual cases can be pulled back out of history.
- Label Print - Added a cassette label screen to allow for printing a label with multi-part information, which differentiates it from the pure bottle label print.
- Web Site – Client Configuration Listing Report - This report shows all of the machines in the “Assist network” and how they are configured down to the scanner port level.
- Distribution - Modified the “show slides from Microtomy” feature to skip slides that were scanned by a verification badge.
- Quality Control Tracking - Created a new module for tracking against specific control slide approval tracking.
- Web Site – Quality Control Log Type Maintenance - This is used to specify the “log types” of quality control information that can be configured for the new quality control tracking application.
- Web Site – Quality Control Type Maintenance – This is used to specify the control type maintenance fields.

Future Updates: Check out the new features coming soon

There are many significant changes and enhancements to the various Assist modules currently underway. Some of the featured modifications currently in progress include the following:

- Native Slide Print Routine – A new version of the slide print routine is being created that provides “stand alone” bar code printing.
- Badge Print Routine – Badge printing will move to the web site for better control of the badge printing routine and to provide additional ease of use.

- Customer Service Phone Switch Interaction – Modifications to the customer service/call tracking module to react to phone calls coming into a customer service representative phone. This allows for “screen pop” of the customer that is calling as the phone call is received.



If you have any questions or would like to schedule upgrades, please contact your Assist Tracking support team at Support@AssistTracking.com.

As always, please submit any questions or comments to the above mailbox and we will address your items as quickly as possible.