



## Release Notes

In version 2020.08 of the Logistics Portal, all kit ship records are now visible in the Fulfillment Orders tab instead of a separate Patient Kit Ship or Patient Kit Ship Call List tab. The Care Team Portal changes will not be released until a future date, so the functionality to support requesting kit ships by kit type will not be enabled directly following this release. The new features for requests by kit type will be enabled in a future release along with the supporting Care Team Portal features.

## New Features

Version 2020.08 of the Logistics Portal includes the following new features:

New Feature	Description
<a href="#">Kits on Demand – Fulfillment Page</a>	<p>The Patient Kit Ship and Patient Kit Ship Call List tabs were removed, so Logistics Portals users can now transition to using the Fulfillment list to access records. Kit Ship records now appear on the Fulfillment list with the Fulfillment type of Kit Ship, so these record types can be tracked in a single location with other fulfillment types.</p> <p>On the Fulfillment page, Logistics Portal users will only see Fulfillment records for the Logistics Centers they have access to.</p>
<a href="#">Filtering and Searching – Fulfillment Page</a>	<p>Kit Type and Kit Pool columns were added to the Fulfillment list page. The columns support search and sort. Also, the ability was added to filter the fulfillment list by kit number by default. Preset filter options were added on the Fulfillment list to make it easier to get to a certain set of results. The Fulfillment list and Kit list search are persistent, so you can switch between pages and maintain search criteria.</p>
<a href="#">Kits on Demand – Assigning a Kit, Changing Kit Type, Removing a Kit, and Assigning a Logistics Center</a>	<p>Kit Ship orders can now be created without a kit assigned, so the process of assigning a kit can be done on the Fulfillment Detail page. After assigning the kit, you also have the option to change the kit type or remove the kit from the record.</p>
<a href="#">Kits on Demand – Kit Pool Configuration for Enable Request by Kit Type</a>	<p>A kit pool configuration setting was added to control selecting by kit number or kit type, so the new method can be used for specific customers while leaving the existing process for the rest of the customers.</p>

<a href="#">New Kit Ship Complete Reason</a>	A new completion reason was added to kit ship records, so support can track when a patient opts out of the program. The new completion reason (Patient declined program) was added to the Complete options for kit ships.
<a href="#">Add EULA Accepted Date to Kit Ship Fulfillment Orders</a>	When a EULA acceptance event is received from the Care Team Portal, the date is populated for both the kit shipping information and fulfillment. When a EULA acceptance event is received, a history note for the EULA event is also created. The Eula Accepted Date column was added to the available columns on the Fulfillment list.
<a href="#">Kit Type Support for Reports</a>	Logistics Portal reports now support kit ship records that do not have a kit ID assigned yet. The reports Patient Kit Ship Report, Kit Pickup Report, and Billing Report, all support kit ship records that contain a null kit ID.
<a href="#">Progress Indicator</a>	Visual feedback is provided to let the user know that the portal is attempting to assign the kit to the kit ship order. This loading indicator also appears when the kit ship order details are loading.
<a href="#">Logistics Portal Ship To Address Updates Based on Care Team Portal</a>	When the shipping info for a kit is updated in the Care Team Portal, the change is synched to the Logistics Portal and appears in the Ship to Address area. The changes to the address appear in red, so they can be easily distinguished from the existing address.
<a href="#">Updated Dashboard Columns</a>	The columns that linked to the Kit Ship and Kit Ship Call List tabs were removed and links were added for the fulfillment types.

## Kits on Demand – Fulfillment Orders

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The Patient Kit Ship and Patient Kit Ship Call List pages were removed, so Logistics Portals users can now transition to using the Fulfillment Order page to access records. Kit Ship records now appear on the Fulfillment list with the Fulfillment type of Kit Ship, so these record types can be tracked in a single location with other fulfillment types (see Example 1).

Fulfillment records with Kit Ship type have a hyperlink to the Kit Ship Detail page, so the page can be accessed from the Fulfillment list (see Example 2). This page includes all the information that was previously available for Kit Ship records and now has the kit type for the record in the Record Information area. The kit type field is editable.

On the Fulfillment Orders page, Logistics Portal users will only see Fulfillment records for the Logistics Centers they have access to. Users with Vivify Support permissions will still see all records (see Example 3).

## Example 1: Fulfillment Orders Page with Kit Ship Fulfillment Type Records

Fulfillment	Fulfillment Type	Status	Customer Name	Vendor Name	Patient Id
3524	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2655
3521	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2653
3437	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2417
3436	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2416
3432	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	1982
3430	Kit Ship	Delivered to Patient	Vivify Dev - Develop	Hypertec	2008
3429	Kit Ship	On Hold	Vivify Dev - Develop	Hypertec	2007
3427	Kit Ship	Delivered to Customer	Vivify Dev - Develop	Hypertec	2400
3404	Kit Ship	Called	Vivify Dev - Develop	Hypertec	1301
3401	Kit Ship	Canceled	Vivify Dev - Develop	Hypertec	2070
3393	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2216
3389	Kit Ship	Canceled	Vivify Dev - Develop	Hypertec	2213
3379	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	2204

## Example 2: Fulfillment ID link Opens the Kit Ship Detail Page with Kit Type Visible

Back to list

Fulfillment: 3997 - Kit: No Kit Assigned - Vivify Dev - Develop

Current Status

Ordered: 8/5/2020  
In Progress

Record Information

Fulfillment Type: Kit Ship  
 Kit Pool: Physical Kits  
 Kit Type: Medium BP Cuff2  
 Logistics Center: [Link]

Contact Attempts: 0  
Update Contact Attempts

Agent: Assign Agent

Devices: 0  
No parts for this kit.

Ship To Address

Address: Sasha Norman, 1234 Main St, Plano, TX 75075, +1 (214)-555-1111  
 Language: English  
 Install Method: technician dispatch  
 Program:

Kit Ship Date

Preferred Welcome Call Date: 8/10/2020 Morning (AM)  
 Welcome Call: Schedule

### Example 3: Fulfillment Records Visible Only for the User's Assigned Logistics Center

Fulfillment	Fulfillment Type	Status	Customer Name	Vendor Name	Patient Id	Logistics Center
3951	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6363	Vivify Development
3952	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6363	Vivify Development
3953	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6706	Vivify Development
3954	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6707	Vivify Development
3956	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6720	Vivify Development
3958	Kit Ship	Shipped	Vivify Dev - Develop	Hypertec	6732	Vivify Development

### Filtering and Searching – Fulfillment Orders

The following changes were made to the Fulfillment Orders page filtering and searching functionality:

- Kit Type and Kit Pool columns were added. The columns support search and sort (see Example 4).
- The following column options were also added: Shipped Date, Delivered Date, Completed Date, Completed Reason, and Install Method.
- The ability was added to filter the fulfillment list by kit number by default. When typing a number, the search previously returned results only by fulfillment id. Now, the search returns all results that match the fulfillment id and the kit id.
- Preset filter options were added to make it easier to get to a specific set of results (see Example 5).
- The Fulfillment list and Kit list search are persistent, so you can switch between pages and maintain search criteria. To remove search options, click Clear Search (see Example 6).

The following new columns are available and can be used to search with search operators.

Column Name	Search Operators
Called Date	=, <, >, =Null, !Null
City	=, ==, !
Current Status Date	=, <, >
Days	=, <, >
History	=

In Progress Date	=, <, >
Kit Status	=, ==, !
On Hold Date	=, <, >
Organization	=, ==, !
Preferred Welcome Call Date	=, <, >
Preferred Welcome Time	=, ==, !
Welcome Call	=, <, >, =Null, !Null
Internal Comments	=

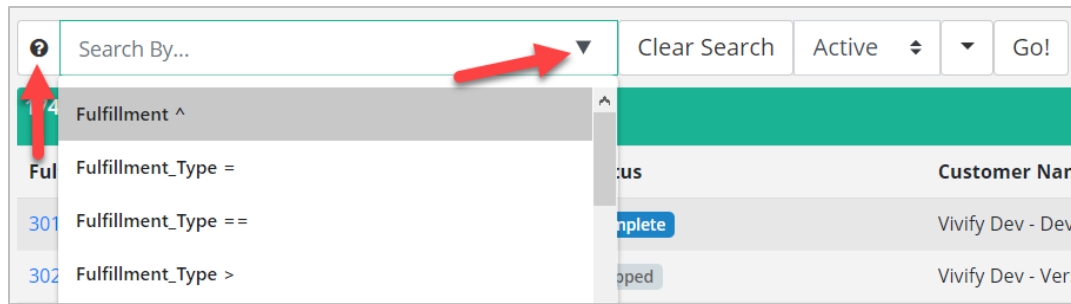
#### Example 4: Kit Pool Name and Kit Type Name Columns (Optional)

Fulfillment	Fulfillment Type	Status	Customer Name	Vendor Name	Patient Id	Logistics Center	Kit Pool Name	Kit Type Name
3012	Kit Ship	Complete	Vivify Dev - Develop	Hypertec	1364	Vivify Development	Reprocessing pool - West	Full Kits2
3025	Kit Ship	Shipped	Vivify Dev - Version57	Hypertec	3645		Version57 East	Full Kit Regular Cuff
3062	Kit Ship	Canceled	Vivify Dev - Develop	Hypertec	470		Dallas Pool East	Medium BP Cuff2
3080	Kit Ship	Canceled	Vivify Dev - Version58	Hypertec	4755	Vivify Logistics Center	Dallas Pool East	Medium BP Cuff2

#### Example 5: Fulfillment Order Filter Options Including Kit Ship Fulfillment Type

Fulfillment	Fulfillment Type	Status
3012	Kit Ship	Complete
3025	Kit Ship	Shipped
3062	Kit Ship	Canceled

## Example 6: Search Options are Persistent



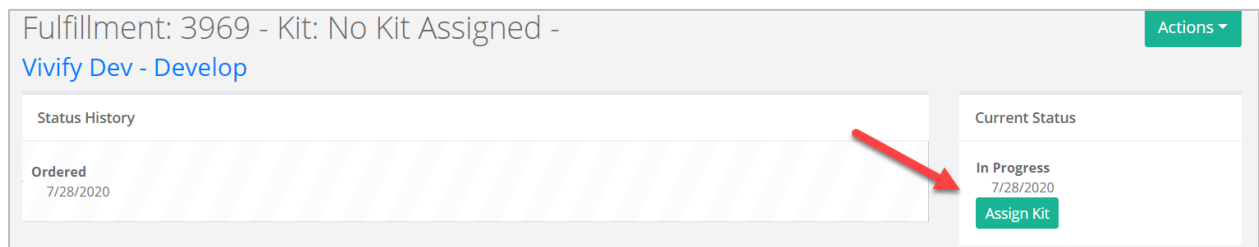
## Kits on Demand: Assigning, Editing, and Removing a Kit from a Kit Ship Record

Kit Ship orders can now be created without a kit assigned, so the process of assigning a kit can be done on the Fulfillment Detail page. After assigning the kit, you also have the option to change the kit type or remove the kit from the record.

### Assigning a Kit

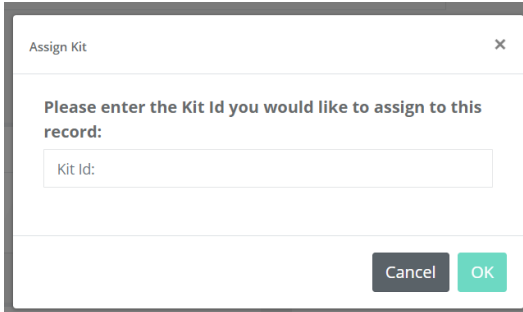
Logistics Portal users can assign a kit to the kit ship record, so the kit can be shipped to the patient. To assign a kit to a kit ship record:

1. On the Current Status card of the Kit Ship record, click **Assign Kit**.



The Assign Kit window appears.

2. Scan or type the Kit Id, and then click **OK**. The validation checks if the kit is assigned to the requested customer, is in the Stored status, does not have an open Ship record, matches the kit type requested, matches the kit pool requested, and is not assigned to a patient in the Care Team Portal. An error message appears in red if any of these conditions fail.



3. The kit is assigned to the record in the In Progress status in both the Care Team Portal and Logistics Portal. The devices of the assigned kit are visible, and a line appears in the kit's Shipping History card on the Kit Detail page. Also, the action is recorded in the Care Team Portal and Logistics Portal history.

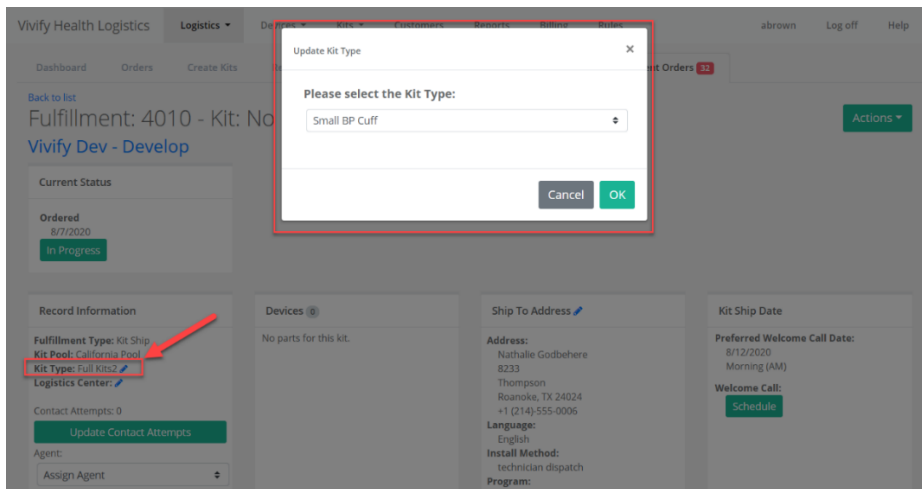
The API for this call has been given to Hypertec to allow this value to be set through an automated process instead of a manual process.

## Editing a Kit Type

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On the Fulfillment Detail page, the edit icon next to the Kit Type field is visible if there is no kit assigned and the record is in the Ordered or In Progress status. This edit icon opens the Update Kit Type window with all kit types for the current customer. When the kit type is changed, the action is recorded in the Care Team Portal and Logistics Portal history.

### Example 7: Changing a Kit Type on a Kit Ship Record



## Removing a Kit

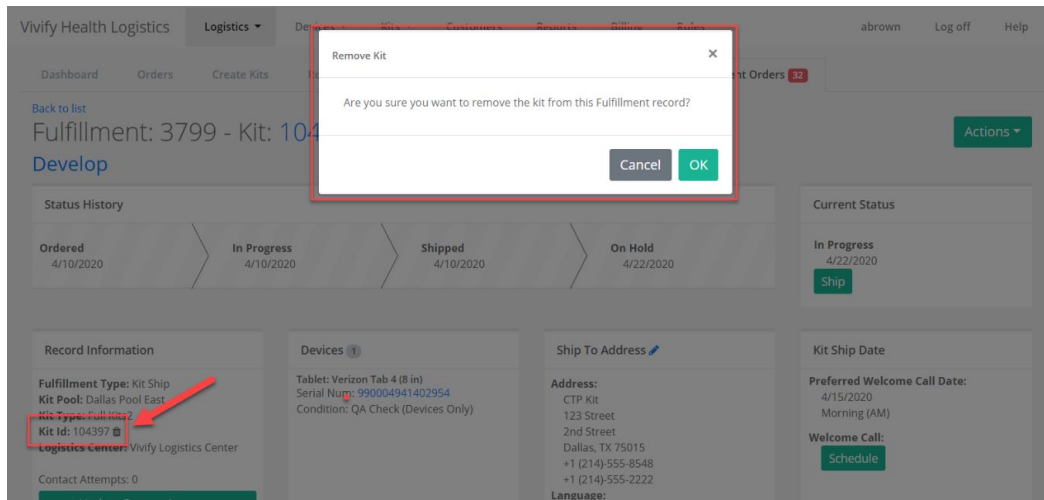
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The ability was added to remove the kit assigned to a Kit Ship record, so it can be modified if there is a need to send a different kit. If the record is in the Ordered or In Progress status, a remove icon is visible next to the Kit Id field. This icon opens a confirmation screen to confirm that you want to remove the kit.

After selecting this option, the kit returns to the Stored status in the Logistics Portal and the Available status in the Care Team Portal.

The following note will be added to the Logistics Portal history: “Kit 123456 was removed from this record.” The following note will be added to the Care Team Portal history: “Kit 123456 was removed from this record and unassigned from the patient.”

### Example 8: Removing a Kit from a Kit Ship Record

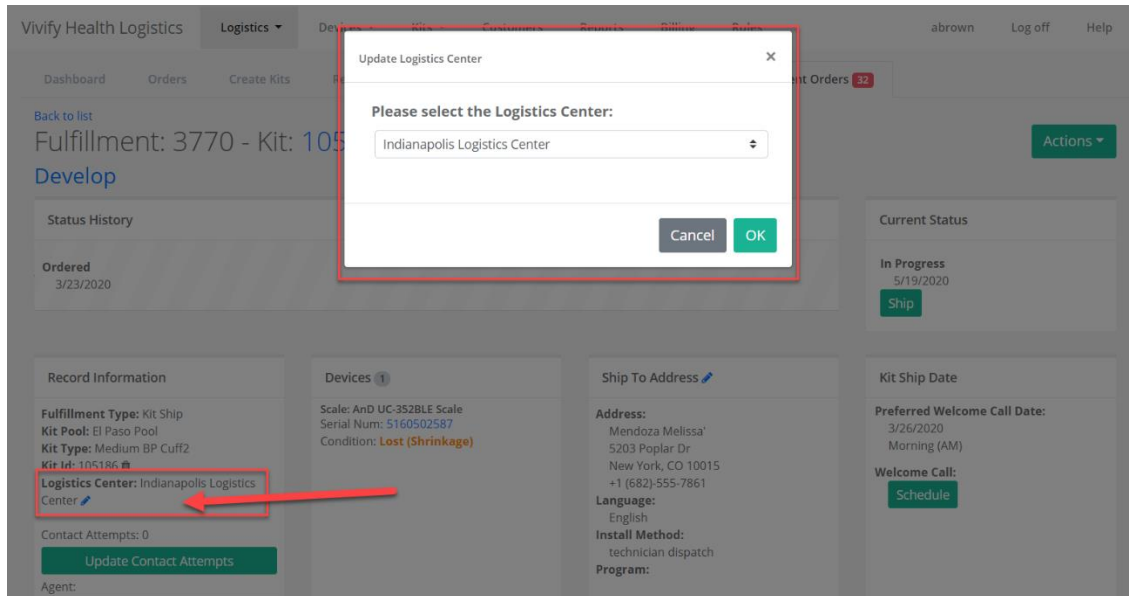


### Editing the Logistics Center

The ability was added to change the Logistics center. When the kit moves to Shipped status, this option is no longer available. When the Logistics center is changed, the action is recorded in the Logistics Portal history and the Care Team Portal history. The API for this call has been given to Hypertec to allow this value to be set through an automated process instead of a manual process.



## Example 9: Editing the Logistics Center



## Kits on Demand – Kit Pool Configuration for Request by Kit Type

A kit pool configuration setting was added to control selecting by kit number or kit type, so the new method can be used for specific customers while leaving the existing process for the rest of the customers. The configuration is only available for Logistics Portal users with Vivify Support permissions. This setting is accessible on the Customers page in the Kit Pools area.

## Example 10: Enable Request by Kit Type Configuration Option in the Customers > New Kit Pool Window

The 'New Kit Pool' form includes fields for Name, Description, and various Logistics Options. At the bottom, there are checkboxes for 'Default Pool', 'Default Selected in Core Team Portal', and 'Enable Request by Kit Type'. The 'Enable Request by Kit Type' checkbox is highlighted with a red box and a red arrow.

- If this configuration is enabled, then kits can be assigned by Kit Type.
- If this configuration is disabled, then kits can be assigned by Kit Id.

## New Kit Ship Complete Reason

A new completion reason was added to Kit Ship records, so support can track when a patient opts out of the program. The new completion reason (Patient declined program) was added to the Complete options for kit ships.

### Example 11: Patient Declined Program Complete Reason

The screenshot shows a kit ship record interface. At the top, a 'Status History' timeline includes 'Ordered' (8/6/2019), 'In Progress' (11/14/2019), 'Shipped' (11/14/2019), 'Called' (7/10/2020), and 'On Hold' (7/10/2020). Below this, there are sections for 'Record Information', 'Devices', and 'Ship To Address'. A dropdown menu is open for the 'Called' status (7/10/2020), showing options: 'Complete', 'Vivify Trained', 'Unable to Contact', 'Sent New Kit', 'Request In-House Install', 'Patient Self Started', and 'Patient declined program'. A red arrow points to the 'Patient declined program' option, which is highlighted with a red box.

## EULA Accepted Date – Kit Ship

When a EULA acceptance event is received from the Care Team Portal, the date is populated for both the kit shipping information and fulfillment. When a EULA acceptance event is received, a history note for the EULA event is also created. The Eula Accepted Date column was added to the available columns on the Fulfillment list.

### Example 12: EULA Accepted Date Column

The screenshot shows a table titled '179 Orders - Filter: Kit Ship Fulfillment Type'. The table has columns: Fulfillment, Fulfillment Type, Status, Customer Name, Vendor Name, Eula Accepted Date, and Patient Id. The 'Eula Accepted Date' column is highlighted with a red box. The table contains two rows of data.

Fulfillment	Fulfillment Type	Status	Customer Name	Vendor Name	Eula Accepted Date	Patient Id
3012	Kit Ship	Complete	Vivify Dev - Develop	Hypertec		1364
3062	Kit Ship	Canceled	Vivify Dev - Develop	Hypertec		470

## Kit Type Support for Reports

Logistics Portal reports now support kit ship records that do not have a kit Id assigned yet. The reports Patient Kit Ship Report, Kit Pickup Report, and Billing Report, all support kit ship records that contain a null kit Id.

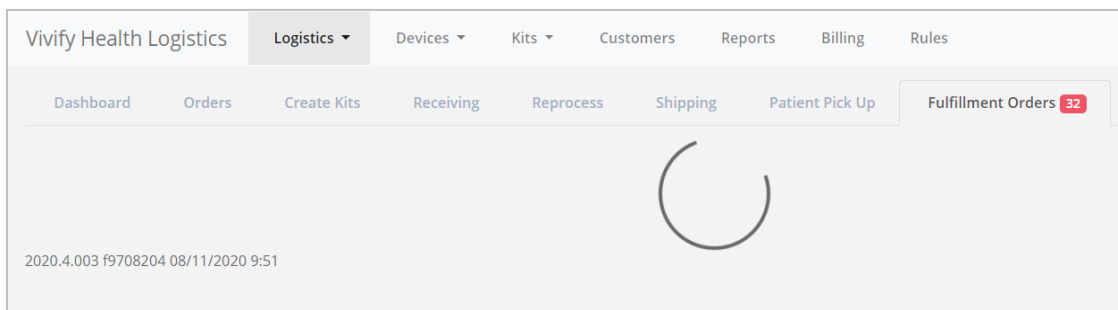
### Example 13: Reports Support No Kit Id Assigned

ID	Kit	Status	Current Status Date	Patient Id	Customer	Days	City	Tracking #	Agent	Created Date	Install Method	In Progress Date
7408	105982	Complete	8/3/2020	5781	AIM	1	Plano, TX 75075	EZ4000000004		8/3/2020	technician dispatch	8/3/2020
7410	105982	Shipped	8/3/2020	5781	AIM	2	Plano, TX 75075	4321		8/3/2020	technician dispatch	8/3/2020
7411		In Progress	8/4/2020	5021	AIM	1	Plano, TX 75204			8/4/2020	technician dispatch	8/4/2020

## Progress Indicator

Visual feedback is provided to let the user know that the portal is attempting to assign the kit to the kit ship order. This loading indicator also appears when the kit ship order details are loading.

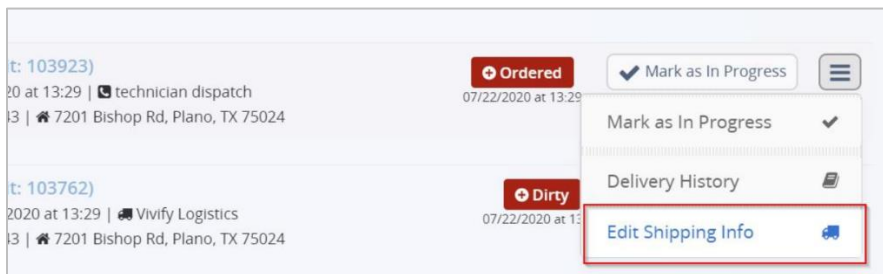
### Example 14: Loading Progress Indicator



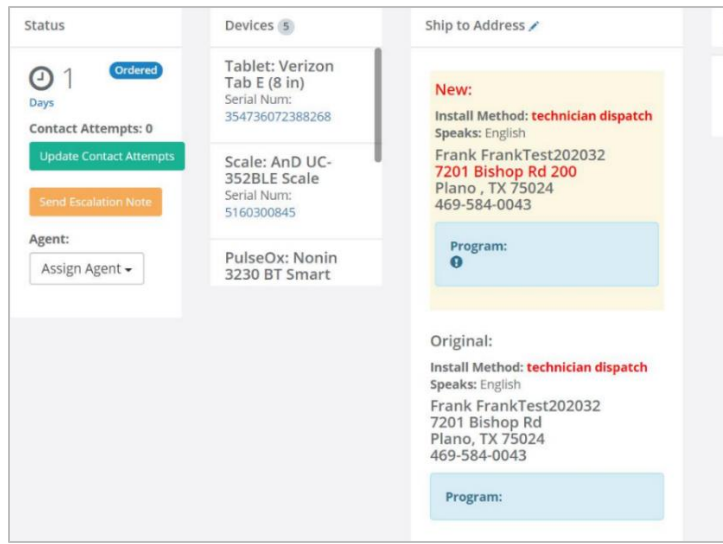
## Logistics Portal Ship To Address Updates Based on Care Team Portal

When the shipping info for a kit is updated in the Care Team Portal (see Example 15), the change is synched to the Logistics Portal and appears in the Ship to Address area (see Example 16). The changes to the address appear in red, so they can be easily distinguished from the existing address.

### Example 15: Editing Shipping Info on the Ship/Pickup Page in the Care Team Portal



## Example 16: Care Team Portal Address Change Appears in the Logistics Portal



## Updated Dashboard Columns

The columns that previously linked to the Kit Ship and Kit Ship Call List tabs were removed and links were added for the fulfillment types. On the Dashboard page, you will now see columns for Kit Ship Fulfillment Orders, Kit Device Replacement Orders, and Device Fulfillment Orders. When you click the column header or title, the Fulfillment Orders page will appear with the fulfillment order type you chose available in the list.

## Example 17: Updated Dashboard Columns

