



**vivifyhealth<sup>®</sup>**

## Third Party Logistics (3PL) Guide

June 2022



Document Edition 2022.05

Copyright © 2022 by Vivify Health, Inc.

The Vivify Health logo is a trademark of Vivify Health, Inc. All other company and/or product names used in this manual are trademarks and/or registered trademarks of their respective manufacturers.

Information in this document is subject to change without notice.

The difference is vivid.<sup>TM</sup>

# Table of Contents

---

<b>1 Getting Started</b> .....	<b>1</b>
1.1 Introduction .....	1
<b>2 Receiving Kits and Devices</b> .....	<b>2</b>
2.1 Introduction .....	2
2.2 Receiving Page .....	2
2.3 Receiving Kits for Reprocessing .....	4
2.4 Applying a Kit Return Reason .....	5
2.5 Receiving Kits for Transfer .....	8
2.6 Receiving Devices (From Patients) .....	9
2.7 Receiving Devices Process (Purchase Order) .....	9
2.8 Uploading Serial Numbers .....	13
<b>3 Shipping and Replacing Kits and Components</b> .....	<b>14</b>
3.1 Introduction .....	14
3.2 Fulfillment Orders Page .....	14
3.2.1 Fulfillment Orders List Page .....	15
Fulfillment Types .....	15
Filter and Sort .....	15
List Column Options .....	17
3.2.2 Fulfillment Orders Detail Page .....	17
Fulfillment Orders Detail Page (Kit Component Replacement) .....	18
Fulfillment Orders Detail Page (Device) .....	18
Fulfillment Orders Detail Page (Kit Ship) .....	19
Fulfillment Orders Detail Page (Kit Pickup) .....	19
3.2.3 Ship Fulfillment Order Page .....	21
Ship Fulfillment Order Page .....	21
Shipping Page (Ship Fulfillment Order Option) .....	22
3.3 Shipping Kits (by Kit ID) Overview .....	22
3.3.1 Shipping Kits (by Kit ID) .....	23
Shipping a Kit on the Fulfillment Orders Page .....	23
Shipping a Kit on the Shipping Page .....	24

---

3.3.2 Shipping VHM Stored Kits .....	26
Ship Direct to Patient .....	29
3.3.3 Sending Logistics Messages .....	31
Sending Messages to the Care Team .....	32
Marking a Message as Read .....	32
Sorting the Kit List by Unread Messages .....	33
3.3.4 Resending an API Request .....	35
3.4 Shipping Kits (by Kit Type) Overview .....	36
3.4.1 Assigning a Kit to a Record .....	36
3.4.2 Editing the Logistics Center .....	37
3.4.3 Removing a Kit from a Kit Ship Record .....	39
3.4.4 Managing Kit Type Configurations .....	40
Definitions .....	40
How It Works .....	41
3.4.5 Kit Type Master List Overview .....	42
Example: Kit Type Master List .....	42
Example: Customers > Kit Types Section .....	43
3.4.6 Adding a New Kit Type to the Kit Type Master List .....	43
3.4.7 Editing the Kit Type Master List .....	45
3.4.8 Applying the Request by Kit Type Kit Pool Configuration .....	46
Example : Enable Request by Kit Type Configuration Option in the Customers > Edit Kit Pool Window .....	47
Example : Enable Request by Kit Type Configuration Option in the Customers > New Kit Pool Window .....	48
3.4.9 Adding a Network Carrier to a Kit Pool .....	48
3.5 Managing Kit Component Replacements .....	49
3.5.1 Replacing Kit Components .....	50
Replacing Kit Components (Kit Details Page) .....	51
Replacing Kit Components (Fulfillment Orders Detail Page) .....	54
3.5.2 Tracking Component Replacement Reasons .....	57

---

Complaints .....	58
Where to Find Replacement Reasons .....	58
Record Information Card .....	58
Shrinkage Note .....	59
3.5.3 Requesting Replacement Batteries .....	59
From the Kit Page .....	60
From the Fulfillment Order Page .....	63
3.5.4 Viewing Replacement Device History .....	65
Example: Care Team Portal – Delivery History with Device Replacement Details and Tracking Number .....	65
Example: Logistics Portal Fulfillment Detail Page – History .....	65
3.5.5 Viewing Internal Part Numbers .....	66
Locations .....	66
APIs Using Internal Part Numbers .....	68
3.5.6 Viewing Tracking Numbers .....	68
Device Fulfillment Tracking Numbers – EasyPost Microservice .....	69
Example: Device Replacement Tracking Numbers in Care Team Portal .....	69
Example: Device Replacement Tracking Numbers in Logistics Portal .....	69
Kit Device Replacement Tracking Numbers – EasyPost Microservice .....	69
Example: Fulfillment Order Detail Page with Status History .....	70
Kit Ship/Pickup Tracking Numbers – EasyPost Microservice .....	70
Example: Kit Pickup Detail Page with Status History .....	71
3.5.7 Kit Device Replacement Messaging .....	71
Example: Kit Device Replacement Messaging on Ship/Pickup Page in Care Team Portal .....	72
Example: Kit Device Replacement Messaging on Fulfillment Detail Page in Logistics Portal .....	72
Example: Unread Message Count (Fulfillment Records) .....	73

---

3.5.8 Mass Assigning Agents to Records .....	73
3.5.9 Exporting the Fulfillment Orders List .....	74
3.6 Managing Device Orders .....	75
3.6.1 Creating a Device Order .....	75
3.6.2 Editing a Device Order .....	79
3.6.3 Deleting a Device Order .....	80
<b>4 Picking Up Kits .....</b>	<b>82</b>
4.1 Introduction .....	82
4.2 Viewing a Pickup Record .....	82
4.2.1 Viewing a Pickup Record on the Fulfillment Orders Page .....	82
4.3 Scheduling a Pickup .....	84
4.4 Updating Contact Attempts .....	86
4.5 Customer Pickup .....	88
<b>5 Reprocessing Kits .....</b>	<b>90</b>
5.1 Introduction .....	90
5.2 Reprocessing Kits .....	90
5.2.1 Receiving the Kit .....	90
5.2.2 Using the Reprocessing Checklist .....	93
5.3 Kit Reprocessing Checklist .....	94
5.3.1 Tracking Kit Components .....	94
5.3.2 Verifying Reprocessing Actions .....	95
5.3.3 Adding Notes .....	96
5.3.4 Signing the Checklist .....	96
5.3.5 Viewing Audit History .....	97
5.3.6 Completing the Checklist .....	97
5.4 Replacing a Device (RMA) .....	98
5.4.1 Replacing a device in a kit .....	99
5.4.2 Replacing a device that has already been replaced .....	100
5.5 Viewing Device Audit History .....	101
<b>6 Page Overviews .....</b>	<b>103</b>
6.1 Introduction .....	103

---

6.2 Kit List Page .....	103
6.2.1 Filter Options .....	104
6.2.2 List Column Options .....	104
6.2.3 Actions .....	105
6.3 Receiving Page .....	105
6.4 Fulfillment Orders Page .....	107
6.4.1 Fulfillment Orders List Page .....	108
Fulfillment Types .....	108
Filter and Sort .....	108
List Column Options .....	110
6.4.2 Fulfillment Orders Detail Page .....	110
Fulfillment Orders Detail Page (Kit Component Replacement) .....	111
Fulfillment Orders Detail Page (Device) .....	111
Fulfillment Orders Detail Page (Kit Ship) .....	112
Fulfillment Orders Detail Page (Kit Pickup) .....	112
6.4.3 Ship Fulfillment Order Page .....	114
Ship Fulfillment Order Page .....	114
Shipping Page (Ship Fulfillment Order Option) .....	115
6.5 Go Patients Search Tool .....	115
Example: Go Patient Search Page with Search Tips .....	116
Example: Go Patient Search with Results .....	116
<b>7 Appendix A: Specification Documents Reference .....</b>	<b>117</b>

# Getting Started

## 1.1 Introduction

---

This document describes how to perform various functions within the Logistics Portal. This guide can be used by employees new to working within the portal or existing employees that need a reminder of procedures.

For procedures for contract manufacturers to use when receiving Vivify's software application package and procedures for assembling kits see Appendix A: Specification Documents on page 117.

The following chapters are included in this guide:

- Chapter 1: Getting Started – Introduction to contents of the guide (on this page).
- Chapter 2: Receiving Device and Kits – Procedures for using the Receiving page in the Logistics Portal to receive devices, kits, and transfers (see "Receiving Kits and Devices," page 2).
- Chapter 3: Fulfillment and Replacement – Procedures for storing kits and shipping parts, devices, and boxes. Procedures for creating device orders and replacing kits devices (see "Shipping and Replacing Kits and Components," page 14).
- Chapter 4: Reprocessing Kits – Processes for preparing kits for use by additional patients and storing kits that aren't currently being used, including the kit reprocessing checklist (see "Reprocessing Kits," page 90).
- Chapter 5: Page Overviews – Descriptions and examples of pages in the Logistics Portal (see "Page Overviews," page 103).

# Receiving Kits and Devices

## 2.1 Introduction

---

This chapter contains information about the workflow for receiving kits and devices.

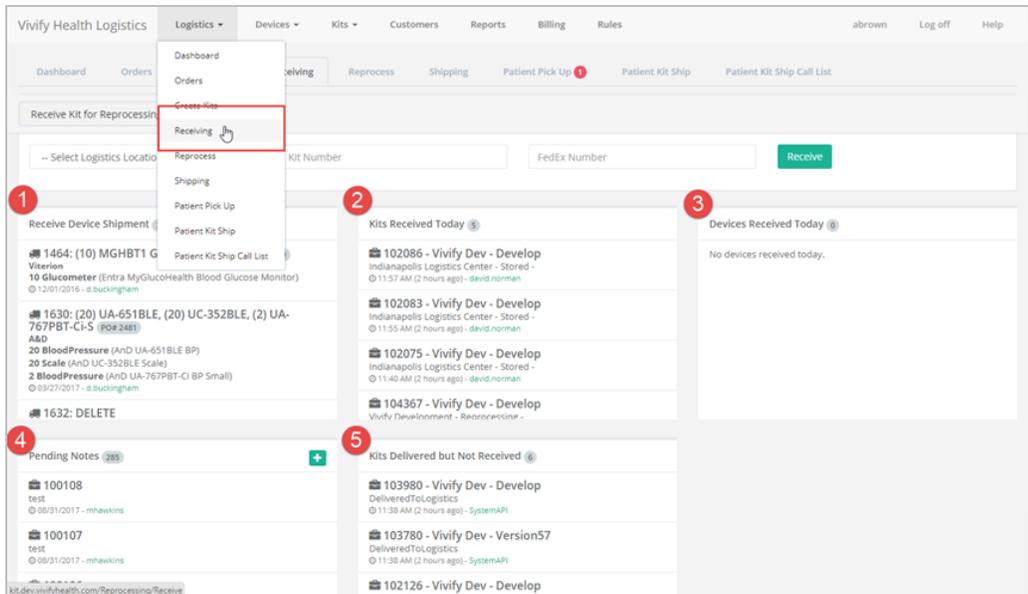
- Receiving Page (on this page).
- Receiving Kits for Reprocessing (see "Receiving Kits for Reprocessing," page 4).
- Receiving Kits for Transfer (see "Receiving Kits for Transfer," page 8).
- Receiving Devices (From Patients) (see "Receiving Devices (From Patients)," page 9).
- Receiving Devices Process (Purchase Order) (see "Receiving Devices Process (Purchase Order)," page 9).
- Uploading Serial Numbers (see "Uploading Serial Numbers," page 13).

## 2.2 Receiving Page

---

The Receiving page is where the Logistics technician receives kits and devices for reprocessing or transfer. The transfer option allows for kits, devices, or parts to be transferred from one logistics center to another.

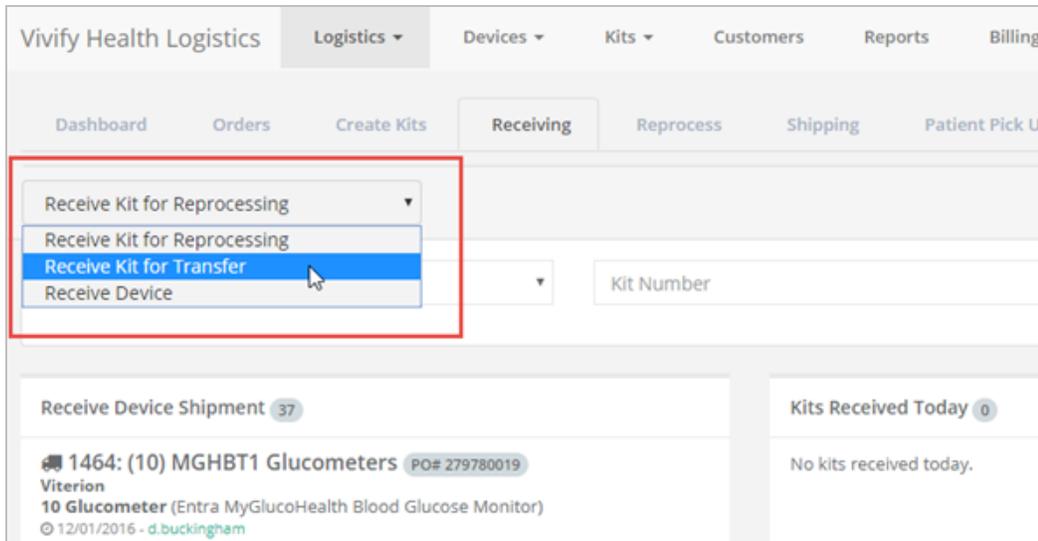
To open the Receiving page, click **Logistics** and then **Receiving**. After the location is selected, the technician scans the kit number and FedEx number and then clicks **Receive**.



The sections available on the Receiving page are as follows:

1. **Receive Device Shipments** – Information about shipment of devices, including the number of devices, type of devices, and the date.
2. **Kits Received Today** – List of the kits that have been received today, including the time and status.
3. **Devices Received Today** – List of the devices received today, including the time and status.
4. **Pending Notes** – Notes related to reprocessing or storing kits in the order. You can add a note with the green plus button.
5. **Kits Delivered but Not Received** – Kits that are currently in the status of Delivered to Logistics, but have not yet been checked in to the warehouse (received).

On the Receiving page, options are available for Receive Kit for Reprocessing, Receive Kit for Transfer, and Receive Device.



## 2.3 Receiving Kits for Reprocessing

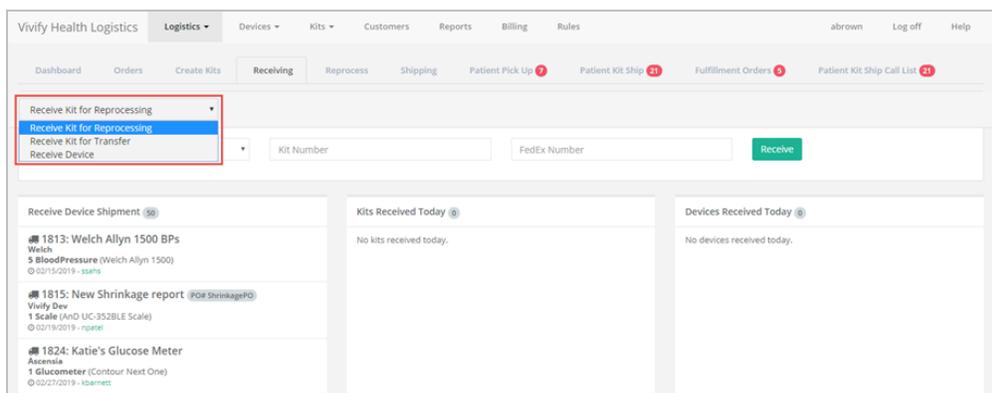
1. Upon receiving a kit to be recycled, bring the kit into the containment area, and then inspect the kit box to make sure there is no obvious damage, which may indicate damage to the components inside the box.

Note: If the kit box is damaged, make sure the FedEx/other shipping person is present while you visually inspect the contents for damage.

2. In the Logistics Portal, click **Logistics**, and then click **Receiving**.

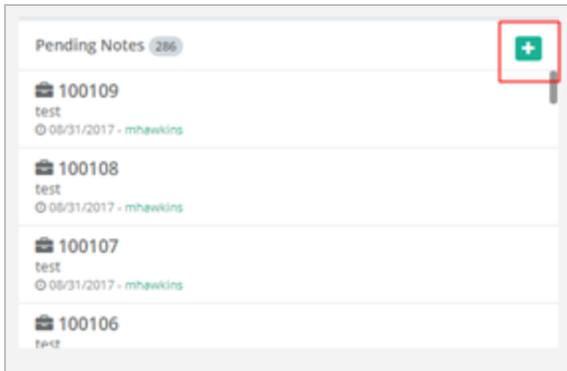
The Receive Kits page appears.

3. In the list, click **Receive Kits for Reprocessing**.

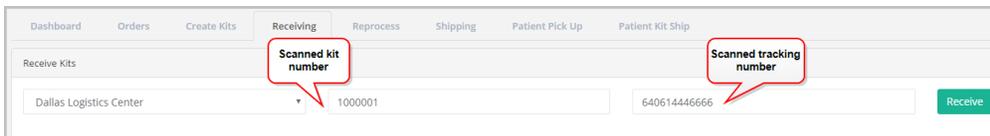


- In the **Select Logistics Location** list, click the receiving location.

In the Pending Notes area, you can click the plus sign to add a note. Pending notes are used to add information about the receiving kit, such as if a kit is missing devices or is contaminated.

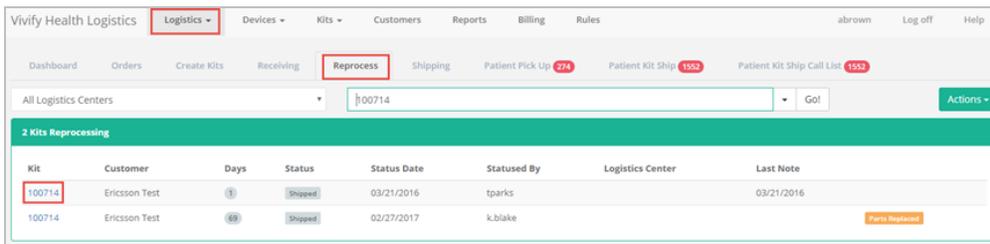


- Scan in the kit number and the tracking number. The information will then appear in the appropriate fields.
- The Receive button is selected automatically after scanning the tracking number.



The Kits Received Today section is populated.

- Click the kit number link from the list. (You can also click the kit number from Logistics > Reprocess.)



The Reprocess page appears.

- [Reprocess the Kit.](#)

## 2.4 Applying a Kit Return Reason

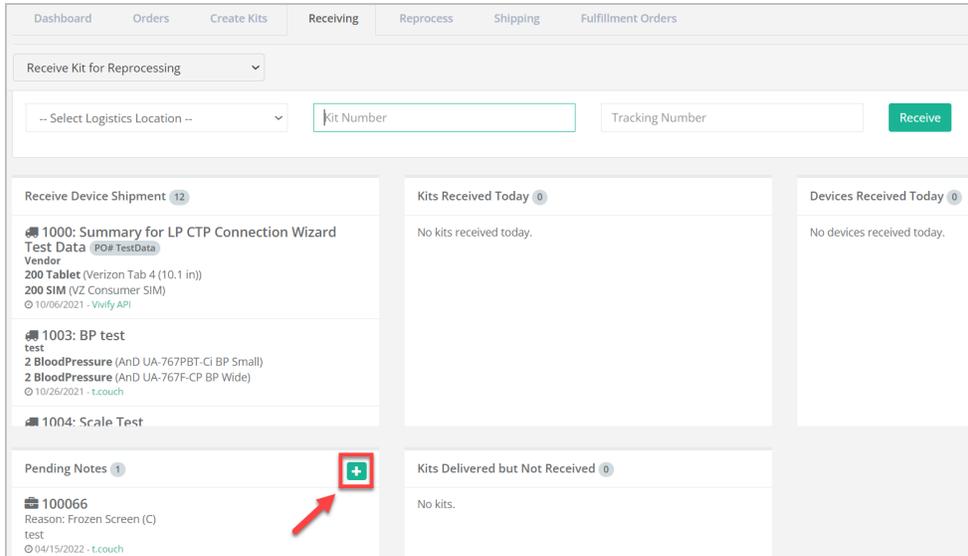
On the Receiving page in the Pending Notes section, a list of *kit return reason codes* appears so that Customer Support agents can record complaints accurately and easily.

To apply a kit return reason:

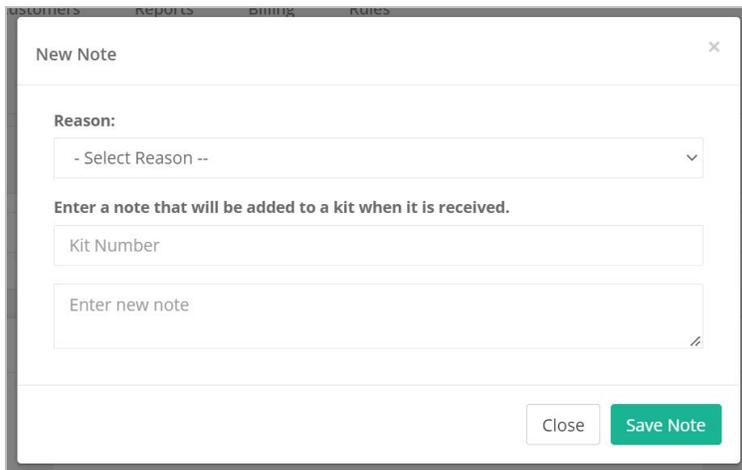
1. From the top navigation menu, click **Logistics > Receiving**.

The **Receiving** page appears.

2. In the **Pending Notes** section, click the **plus (+)** icon to add a new note.



The **New Note** window appears.

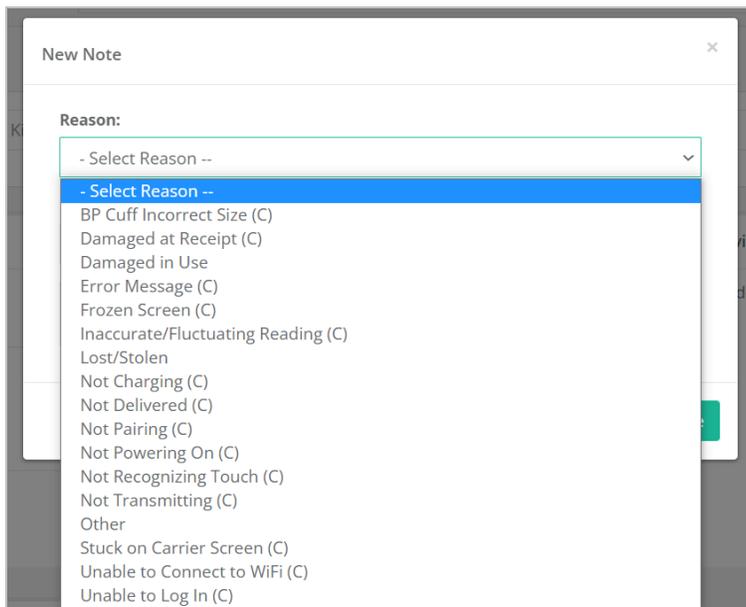


3. In the **Reason** list, select one of the following options:

### Reasons

- BP Cuff Incorrect Size (C)
- Damaged at Receipt (C)
- Damaged in Use

- Error Message (C)
- Frozen Screen (C)
- Inaccurate/Fluctuating Reading (C)
- Lost/Stolen
- Not Charging (C)
- Not Delivered (C)
- Not Pairing (C)
- Not Powering On (C)
- Not Recognizing Touch (C)
- Not Transmitting (C)
- Other
- Stuck on Carrier Screen (C)
- Unable to Connect to WiFi (C)
- Unable to Log In (C)



**Note:** If the reason is due to a complaint, the text (C) appears to the right of the reason text.

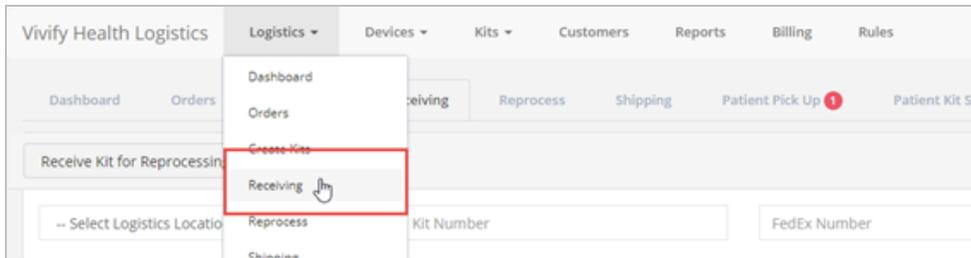
4. Below the prompt, enter a note that will be added to a kit when it is received:
  - a. In the **Kit Number** box, type a kit number.
  - b. In the **Enter new note** box, type note text.
5. Click **Save Note**.

## 2.5 Receiving Kits for Transfer

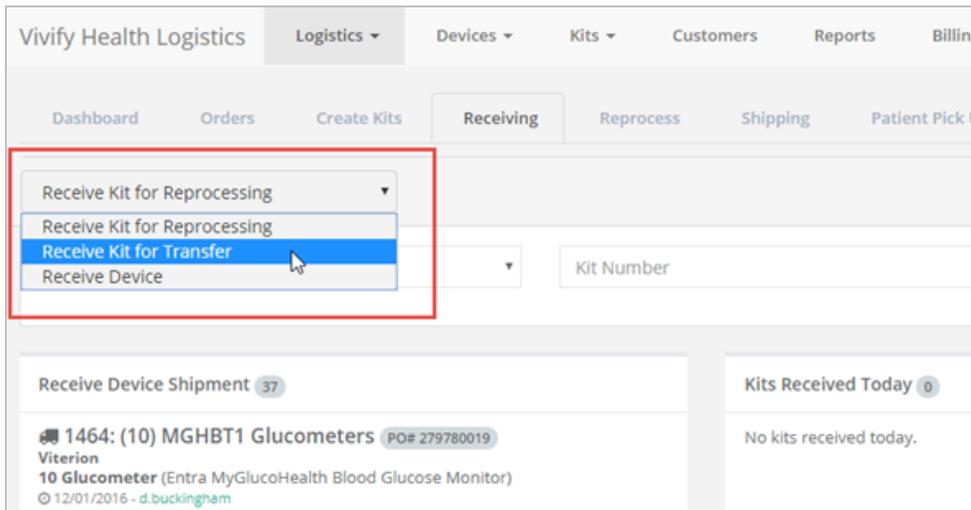
On the Receiving page, the Transfer option allows for kits, devices, or parts to be mass transferred from one logistics center to another. In order to transfer a kit, the user will ship the kit as normal and then receive the kit on the Receiving screen.

To receive a kit for transfer:

1. Click **Logistics** and then **Receiving**.



2. In the list, click **Receive Kit for Transfer**. The act of receiving the kit for transfer updates the current location, adds a receive record to the kit, but correctly does not create a reprocessing record.



3. Select the location.
4. Scan the kit number and FedEx number.

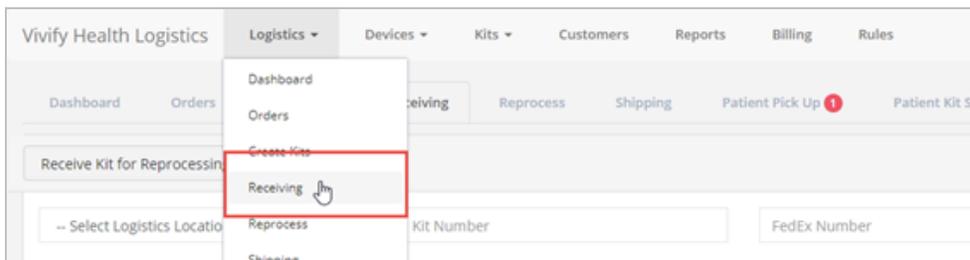
5. Click **Receive**. After receiving kits, the state of this option is held so you can continue to receive kits for transfer without needing to reselect the Receive Kits for Transfer option.

## 2.6 Receiving Devices (From Patients)

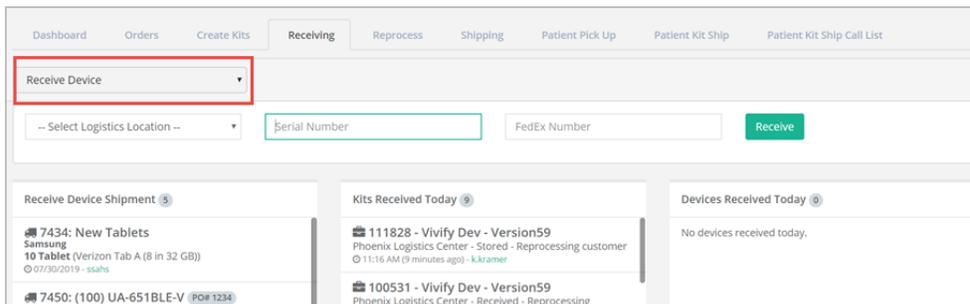
The Receiving page has an option that can be used to receive devices returned by the patient. The device is automatically put in the QA Check status and a receive record is created. Also, on the Receiving page, a card showing the devices received today is available.

To receive a device:

1. Click **Logistics** and then **Receiving**.



2. In the list, click **Receive Device**.



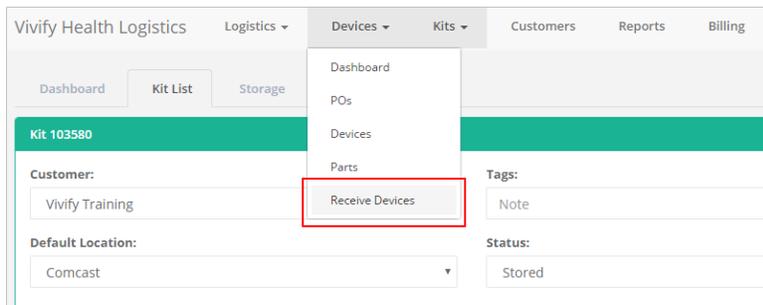
3. In the **Select Logistics Location** list, select the location where the device is being received.
4. Scan the kit number and FedEx number.
5. Click **Receive**. After receiving device, the state of this option is held so you can continue to receive devices without needing to reselect the Receive Device option.

The device(s) appear in the Devices Received Today section. The devices are automatically in a QA Status check status.

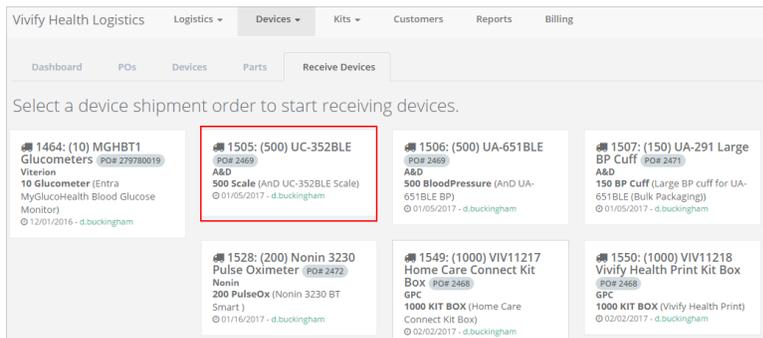
## 2.7 Receiving Devices Process (Purchase Order)

When receiving devices, take the following steps:

1. Click **Devices**, and then click **Receive Devices**.

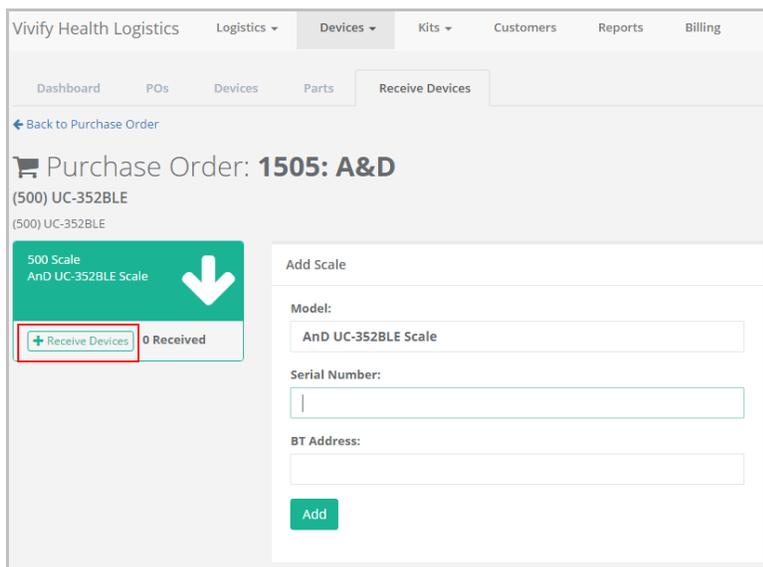


2. Click a device shipment order.



The Purchase Order page appears.

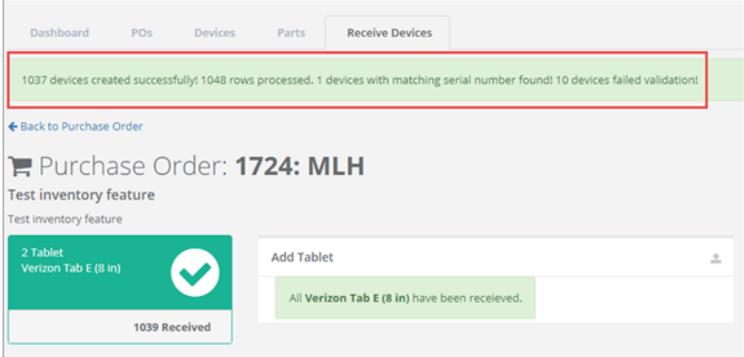
4. In the **Purchase Order** screen, click **Receive Devices**.



The Receive Devices page appears.

5. Do any of the following:

If you want to	Then																																																			
Scan devices	<p>Scan the barcode of the serial numbers and the Bluetooth (BT) MAC addresses for the devices.</p> <p>The device information is populated in the Logistics Portal.</p> <p>After the devices are added, the quantity and type of each device type appears, as well as a serial number for each.</p>																																																			
Upload a file with multiple devices	<p>a. Click the upload icon (  ).</p> <p>The Select file to receive window appears.</p>  <p>b. Click <b>Choose File</b> and navigate to the excel file on your computer.</p> <p>The system supports the uploading of excel (.xlsx) files with two columns for devices and one column for SIMs.</p> <table border="1" data-bbox="529 1104 1144 1614"> <thead> <tr> <th></th> <th>A</th> <th>B</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><b>Serial Number</b></td> <td><b>IMEI</b></td> </tr> <tr> <td>2</td> <td>358616091332602</td> <td>358616091332602</td> </tr> <tr> <td>3</td> <td>358616091333055</td> <td>358616091333055</td> </tr> <tr> <td>4</td> <td>358616091333097</td> <td>358616091333097</td> </tr> <tr> <td>5</td> <td>358616091333071</td> <td>358616091333071</td> </tr> <tr> <td>6</td> <td>358616091332842</td> <td>358616091332842</td> </tr> <tr> <td>7</td> <td>358616091339607</td> <td>358616091339607</td> </tr> <tr> <td>8</td> <td>358616091334269</td> <td>358616091334269</td> </tr> <tr> <td>9</td> <td>358616091332933</td> <td>358616091332933</td> </tr> <tr> <td>10</td> <td>358616091334137</td> <td>358616091334137</td> </tr> <tr> <td>11</td> <td>358616091334467</td> <td>358616091334467</td> </tr> <tr> <td>12</td> <td>358616091334434</td> <td>358616091334434</td> </tr> <tr> <td>13</td> <td>358616091333873</td> <td>358616091333873</td> </tr> <tr> <td>14</td> <td>358616091335365</td> <td>358616091335365</td> </tr> <tr> <td>15</td> <td>358616091337825</td> <td>358616091337825</td> </tr> <tr> <td>16</td> <td>358616091333857</td> <td>358616091333857</td> </tr> </tbody> </table> <p>c. Click <b>Open</b>.</p> <p>The file name appears in the Select file window.</p>		A	B	1	<b>Serial Number</b>	<b>IMEI</b>	2	358616091332602	358616091332602	3	358616091333055	358616091333055	4	358616091333097	358616091333097	5	358616091333071	358616091333071	6	358616091332842	358616091332842	7	358616091339607	358616091339607	8	358616091334269	358616091334269	9	358616091332933	358616091332933	10	358616091334137	358616091334137	11	358616091334467	358616091334467	12	358616091334434	358616091334434	13	358616091333873	358616091333873	14	358616091335365	358616091335365	15	358616091337825	358616091337825	16	358616091333857	358616091333857
	A	B																																																		
1	<b>Serial Number</b>	<b>IMEI</b>																																																		
2	358616091332602	358616091332602																																																		
3	358616091333055	358616091333055																																																		
4	358616091333097	358616091333097																																																		
5	358616091333071	358616091333071																																																		
6	358616091332842	358616091332842																																																		
7	358616091339607	358616091339607																																																		
8	358616091334269	358616091334269																																																		
9	358616091332933	358616091332933																																																		
10	358616091334137	358616091334137																																																		
11	358616091334467	358616091334467																																																		
12	358616091334434	358616091334434																																																		
13	358616091333873	358616091333873																																																		
14	358616091335365	358616091335365																																																		
15	358616091337825	358616091337825																																																		
16	358616091333857	358616091333857																																																		

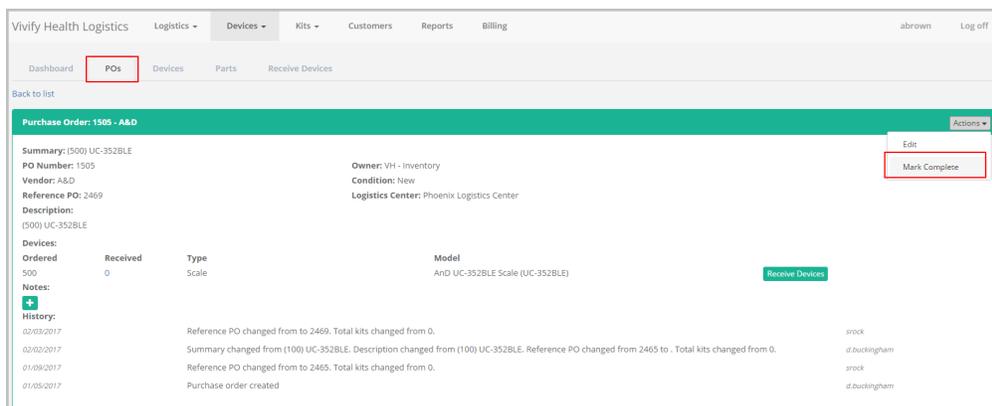
If you want to	Then
	<p>d. Click <b>Save</b>.</p> <p>The devices and their serial numbers are uploaded to the Logistics Portal. If you have a large set of devices, then it may take a minute or more to process.</p> 
Manually add devices	<p>a. Select the device from the menu.</p> <p>b. Type the serial numbers and MAC addresses for the device.</p> <p>c. Click <b>Add</b>.</p>

Note: Leave the Pulse Oximeter (OX) in its packaging, because its serial number is not barcoded on the device.

- Click the **POs** tab, and then click your order number in the list.

The Purchase Order page appears.

- In the **Actions** menu, click **Mark Complete**.



The purchase order is removed from the Purchase Order page.

6. If you want to revise the order later, click the **POs** tab, and then click the PO number link.

PO #	Summary	Reference PO
1567	Test inventory report with Parts - Box	
1505	(500) UC-352BLE	2469
1565	Bariatric Scale boxes	

The Purchase Order page appears where you can click Receive Devices and make any changes.

## 2.8 Uploading Serial Numbers

Users with Logistics role permissions can upload serial numbers when receiving devices. The user must have Login, Logistics, and Edit permissions enabled, then they can access the Devices > Receive Devices page. Uploading a list of serial numbers allows for a large group of devices to be added more efficiently.

Vivify Health Logistics | Logistics | **Devices** | Kits | Customers | Reports | Billing | Rules

Dashboard | POs | Devices | Parts | **Receive Devices**

Back to Purchase Order

**Purchase Order: 1630: A&D**  
(20) UA-651BLE, (20) UC-352BLE, (2) UA-767PBT-CI-S  
(20) UA-651BLE, (20) UC-352BLE, (2) UA-767PBT-CI-S

- 20 BloodPressure AnD UA-651BLE BP | 1 Received
- 20 Scale AnD UC-352BLE Scale | 1 Received
- 2 BloodPressure AnD UA-767PBT-CI BP Small | 2 Received

Add BloodPressure

Model: AnD UA-651BLE BP

Serial Number:

BT Address:

Add

Select file to receive AnD UA-651BLE BP

File:

Choose File No file chosen

Cancel Save

# Shipping and Replacing Kits and Components

## 3.1 Introduction

---

The Fulfillment Orders page assists the Logistics team with ordering, replacing, shipping, and picking up kits and devices. This page is the central location in the Logistics Portal for replacing devices and parts and fulfilling kit ship orders. Kit Ship and Kit Pickup records appear on the Fulfillment list with the Fulfillment type of Kit Ship or Kit Pickup, so these record types can be tracked in a single location with other fulfillment types.

When a patient has a kit and needs a device to be replaced due to it being broken or lost, the Fulfillment Orders pages can be used to create the order and track the order as it goes through the process of being sent to the patient. Tracking numbers are used to sync information between the Care Team Portal and Logistics Portal. Messaging, history, and status are shared between the portals to provide details of the order to all parties involved in assisting the customer with their care management program.

This chapter includes the following:

- Fulfillment Orders Page (see "Fulfillment Orders Page," page 107).
- Shipping Kits (by Kit ID) Overview (see "Shipping Kits (by Kit ID) Overview," page 22).
- Shipping Kits (by Kit Type) Overview (see "Shipping Kits (by Kit Type) Overview," page 36).
- Managing Kit Component Replacements (see "Managing Kit Component Replacements ," page 49).
- Managing Device Orders (see "Managing Device Orders," page 75).

## 3.2 Fulfillment Orders Page

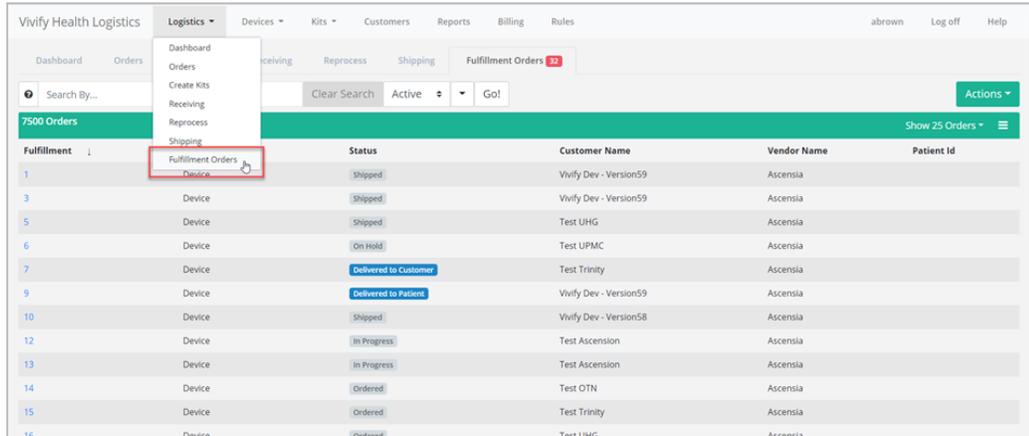
---

The Fulfillment Orders page is the central location in the Logistics Portal for replacing devices and parts and fulfilling kit ship and kit pickup orders. You can create +Go device and kit component replacement orders, check an order's status, and ship or schedule orders from this page.

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

### 3.2.1 Fulfillment Orders List Page

To open the Fulfillment Orders List, click **Logistics** and then click **Fulfillment Orders**.



#### Fulfillment Types

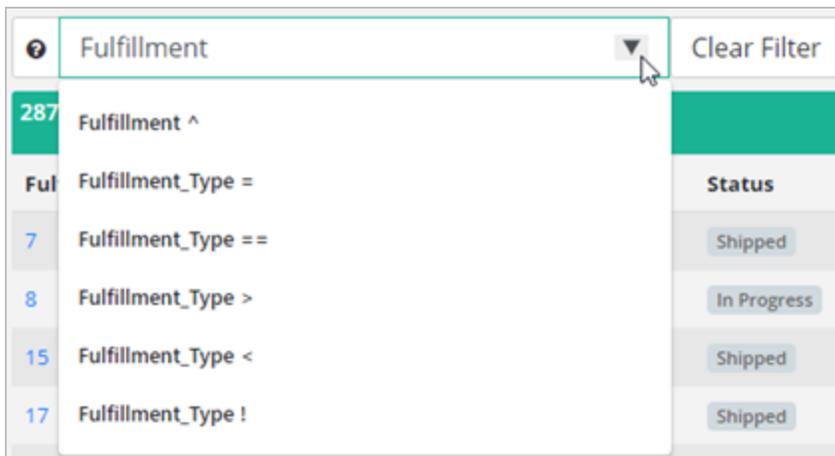
- **Kit Pickup** – Pickup orders appear with the Fulfillment type Kit Pickup.
- **Kit Ship** – Ship orders appear with the Fulfillment type Kit Ship.
- **Kit Component Replacement** – Orders to replace broken or missing devices in existing kits. These orders are created on the Kit Details page from the **Actions > Request Component Replacement** menu.
- **Device** – Orders for +Go devices from vendors Ascensia and Hypertec. These orders are created on the Fulfillment Orders List page from the **Actions > Create Device Order** menu.

#### Filter and Sort

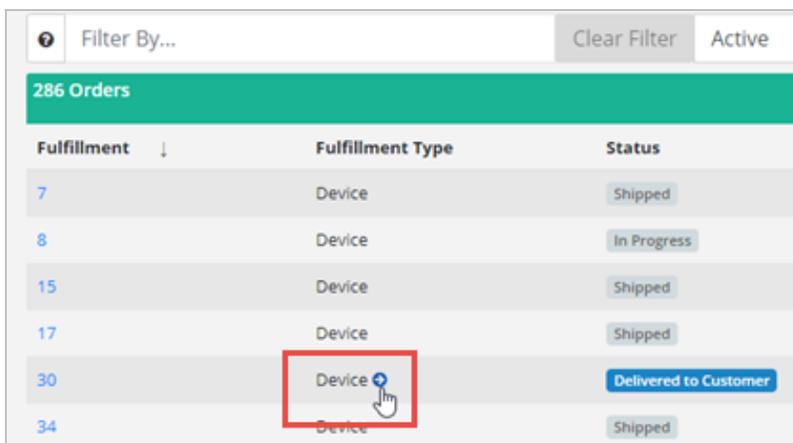
The filter options on the Fulfillment Orders List page allow you to customize the list to only the orders that you need to take action on. Some common filters that are used for orders are **Fulfillment Type**, **Kit ID**, or **Status**.

To filter the list, do either of the following:

- In the Filter By field, type a column title to filter by or use the down arrow to view available filter options.



- In the list, to the right of any of the values in the table, click the arrow icon (↕). The list will reload with the filter applied for that value. To add another filter, click the plus icon (+).



Fulfillment	Fulfillment Type	Status
7	Device	Shipped
8	Device	In Progress
15	Device	Shipped
17	Device	Shipped
30	Device	Delivered to Customer
34	Device	Shipped

Fulfillment	Fulfillment Type	Status
30	Device	Delivered to Customer
62	Device	Delivered to Customer

### List Column Options

The columns that appear on the Fulfillment Orders List page are customizable, so you can choose what information is available in the table. To customize the table, click the checkbox to the left of the column name option. Click **Save as Default** to apply the setting for every time you log in. Click out of the window to save the setting only for the current session on the page. The Fulfillment Type column shows you the type of order (Device, Kit, and Kit Component Replacement), which is helpful in determining if the order is for a +Go device or a Kit device.

### 3.2.2 Fulfillment Orders Detail Page

This page includes statuses, reference information, internal notes, dates, history, and other details. Logistics Portal users can review all information related to kit device orders, +Go device orders, and kit ship orders from this page.

## Fulfillment Orders Detail Page (Kit Component Replacement)

Dashboard | Orders | Create Kits | Receiving | Reprocess | Shipping | **Fulfillment Orders**

Back to list

Fulfillment: 162 - Kit: 100168 - jigsaw Actions

**Status History**

Ordered 3/10/2022

**Current Status**

In Progress 3/10/2022  
Replace Component(s) Ship

**Record Information**

Fulfillment Type: Kit Component Replacement  
 Kit Pool: Default Kit Pool  
 Kit Type: Tablet + BP  
 Kit Id: 100168  
 Logistics Location: Vivify Development  
 Replacement Reason: BP Cuff Not Inflating/Deflating  
 Contact Attempts: 0  
Update Contact Attempts  
 Agent: Assign Agent

**Replacement Components**

Batteries  
 Old: Scale Batteries - SCALE BATTERIES (Scale Batteries)  
 BP Cuff  
 Old: BP Cuff Medium (fits UA-651) SIZE 9.4"-14.2" OTN ONLY - 00221 (UA 290)  
 Power Adapter  
 Old: Adapter 30 Pin - 3001-TC (3001-TC)  
 Scale  
 Old: Welch Allyn Weight Scale (RPM-SCALE100) - 00227(300001)

**Ship To Address**

Address:  
 Jack Frost  
 7201 Bishop Rd.  
 Plano, TX 75024  
 +1 (817) 555-9999  
 Language:  
 English

**Pick Up Date**

Scheduled Date:  
 None  
Schedule

Pick Up Date:  
 None  
Picked Up

## Fulfillment Orders Detail Page (Device)

Vivify Health Logistics | **Logistics** | Devices | Kits | Customers | Reports | Billing | Rules | abrown | Log off | Help

Dashboard | Orders | Create Kits | Receiving | Reprocess | Shipping | Patient Pick Up | **Fulfillment Orders** 29

Back to list

Fulfillment: 41 - Health Actions

**Status History**

Ordered 11/12/2019 → In Progress 1/30/2020 → Shipped 1/30/2020

**Current Status**

Delivered to Patient 4/2/2020  
Complete

**Reference Information**

Contact Caregiver:  
 Billing Information:  
 Encounter Id:  
 Patient DOB:  
 Organization:  
 Carrier Escalation #: 5  
 Support Case Number: 234

**Devices/Parts**

Vendor: Ascensia  
 Glucometer : Contour Next One  
 Quantity: 1  
 Glucometer : Contour Next One  
 Quantity: 999  
 Glucometer : Contour Next One  
 Quantity: 377  
 Glucometer Strips : Contour Next One Refill Kit includes 200 strips and lancets  
 Quantity: 1  
 Glucometer Strips : Contour Next One Refill Kit includes 200 strips and lancets

**Ship To Address**

Address:  
 John2 Johnson  
 738 Flower Alley #735  
 12 Parkwood blvd  
 Dallas, ON A1B 1C1  
 111-555-1234  
 +01 222-222-4444  
 Track:  
 Purolator - E24000000004

**History**

Status changed from 'Shipped' to 'DeliveredToPatient'.  
 04/02/2020 - system  
 Outbound Tracking Number changed from " " to 'E24000000004'.  
 04/02/2020 - david.norman  
 Address changed from ' John2 Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, TX 75207, 111-555-1234 +01 222-222-4444' to ' John2 Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, ON A1B 1C1, 111-555-1234 +01 222-222-4444'.  
 04/02/2020 - david.norman  
 Address changed from ' John Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, TX 75207, 111-555-1234 +01 222-222-4444' to ' John Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, ON A1B 1C1, 111-555-1234 +01 222-222-4444'.  
 04/02/2020 - david.norman

**Internal Vivify Notes**

No notes.

## Fulfillment Orders Detail Page (Kit Ship)

Dashboard Orders Create Kits Receiving Reprocess Shipping **Fulfillment Orders 53**

[Back to list](#)  
Fulfillment: 44758 - Kit: 320208 - v202203 Actions ▾

**Status History**

Ordered  
4/27/2022

**Current Status**

In Progress  
4/27/2022  
Ship

**Record Information**

Fulfillment Type: Kit Ship  
Kit Pool: Default Kit Pool  
Kit Type: Tablet + BP + PulseOx  
Kit Type Configuration: VIV009C11  
Kit Id: 320208  
Logistics Center: Phoenix Logistics Center  
BP Cuff Size: Wide Range  
Scale Type: None

Contact Attempts: 0  
Update Contact Attempts

Agent:  
Assign Agent

**Devices 4**

Condition: New

PulseOx: Nonin 9569 Onyx II  
Serial Num: 357287100154618  
Condition: New

BloodPressure: AnD UA-651BLE BP  
Serial Num: 32342438  
Condition: New

SIM: VZ Consumer SIM  
Serial Num: 25184418170903159448  
Condition: New

**Ship To Address**

Address:  
Jack Frost  
7201 Bishop Rd.  
Plano, TX 75024  
+1 (817)-555-9999

Language:  
English

Program:

**Kit Ship Date**

Preferred Welcome Call Date:  
5/2/2022  
Morning (AM)

Next Scheduled Call:  
Schedule

## Fulfillment Orders Detail Page (Kit Pickup)

Vivify Health Logistics **Logistics** Devices Kits Customers Reports Billing Rules abrown Log off Help

Dashboard Orders Create Kits Receiving Reprocess Shipping **Fulfillment Orders 32**

[Back to list](#)  
Fulfillment: 36877 - Kit: 113984 - 202012 Actions ▾

**Status History**

Customer Pickup  
1/8/2021

Received  
1/8/2021

Reprocessing  
1/8/2021

Device Missing  
1/8/2021

**Current Status**

Pending Lost  
Could not reach patient  
1/8/2021  
Complete

**Record Information**

Fulfillment Type: Kit Pickup  
Kit Pool: Physical Kit  
Kit Type: Full Kits  
Kit Id: 113984  
Logistics Center: Vivify Development

Contact Attempts: 0  
Update Contact Attempts

Agent:  
Assign Agent

**Devices 6**

Scale: AND UC-321PBT Scale  
Serial Num: 5130550179  
Condition: Used

Tablet: Galaxy Tab A 8.4"(2020),32GB,(Verizon)  
Serial Num: 352250112771972  
Condition: Used

PulseOx: SHENZHEN CREATIVE PC60-FW  
Serial Num: 976903970711  
Condition: Used

**Pick Up Address**

Address:  
Abby Tarnosky  
3333 Preston Rd  
Frisco, Tx 75034  
+1 (313)-555-5555

Track:  
FedEx - 58-55

**Pick Up Date**

Preferred Date:  
1/13/2021  
Morning (AM)

Scheduled Date:  
Schedule

Pick Up Date:  
Picked Up

This page includes sections for the following information:

- **Status History and Current Status:** Status History shows the progress the order has completed through the various states, including the date of transition. Current Status shows the date the order entered into its current status and gives an option to process the order to the next step in the workflow.

The following status types are supported:

### Status Types

- Ordered
- In Progress
- Shipped
- Delivered to Patient
- Delivered to Customer
- Delivered to Logistics
- Called
- Scheduled
- Picked Up
- Received
- Complete
- Canceled
- On Hold

Each status has a button that allows you to move the record to the next step in the process. When a record is placed On Hold, users can click **Resume** to move the record back to the previous status.

- **Replacement Components** (Fulfillment Type Kit): Lists the type of device that has been requested to be replaced and includes the old and new model and serial number. Clicking the device serial number opens the Device Details page, where you can view the history of the device and other information. The Replacement Components section only appears in records with the Fulfillment types of Kit and Kit Component Replacement.
- **Devices/Parts** (Fulfillment Type Device): Lists the vendor, type of device or part, and amount that is included in the order. The Devices/Parts section only appears for the Fulfillment Type of Device.
- **Ship To Address:** Lists the address, language, and tracking number for the order. Clicking the tracking number opens the FedEx site.

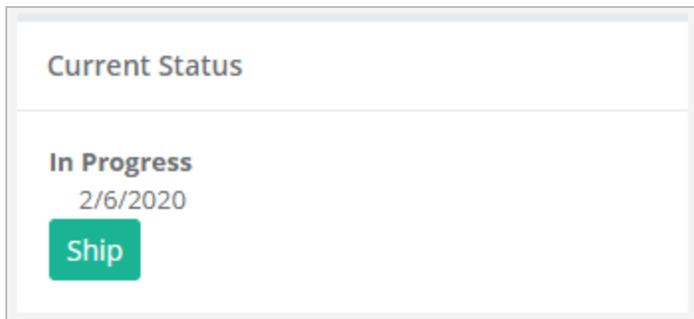
Note: Only the last 14 digits of FedEx bar codes will be saved in the Ship To Address card. (This does not apply to UPS and USPS numbers.)

- **Pick Up Date:** Shows the retrieval dates of the old device and the Scheduled Date and Pick Up Date, with options to reschedule and mark as picked up (if the order has shipped).
- **Reference/Record Information:**
  - Kit Component Replacement Fulfillment Type: Includes Kit Pool, Kit Type, Kit Id, Logistics Location, Replacement Reason, and Contact Attempts.
  - Device Fulfillment Type: Includes Contact Caregiver (Name, Phone Number, and Email of the assigned Care Team member) and Billing Information (Encounter Id, Patient DOB, Organization, Carrier Escalation #, and Support Case Number). Carrier Escalation # and Support Case Number fields can be edited.
  - Kit Ship Fulfillment Type: Includes Kit Pool, Kit Type, Kit Type Configuration, Kit Id, Logistics Center, BP Cuff Size, Scale Type, and Contact Attempts.
  - Kit Pickup Fulfillment Type: Includes Kit Pool, Kit Type, Kit Id, Logistics Center, and Contact Attempts.
- **Internal Vivify Notes:** Comments or information about the order.
- **History:** History information related to the current fulfillment record, including status changes, pick up dates and times, and any changes made to the order information.

### 3.2.3 Ship Fulfillment Order Page

---

On the Fulfillment Orders Detail page, click **Ship** to open the Ship Fulfillment Order page.



#### Ship Fulfillment Order Page

The same fields are required as when shipping kits. At the bottom of the screen, you can see all the fulfillment records that have been shipped today, along with relevant details.

### Shipping Page (Ship Fulfillment Order Option)

After shipping the fulfillment order, the Shipping page appears. Users can do one of the following actions:

- Scan a kit number to populate the **Kit Number** field.
- Type a kit number into the **Kit Number** field.
- Select a shipping container from the **Select Shipping Container** list menu.

After doing one of the actions described above, users can click **Fetch** to search for the desired results.

### 3.3 Shipping Kits (by Kit ID) Overview

Kits are customized based on the needs of the patients and their health monitoring program. Kits are built by the logistics team and shipped to the patient or to the hospital to distribute. When a patient completes their program, they return their kit to the logistics center where it is cleaned and reprocessed or stored.

This section includes the following:

- Shipping Kits (by Kit ID) (see "Shipping Kits (by Kit ID)," page 23).
- Shipping VHM Stored Kits (see "Shipping VHM Stored Kits," page 26).

- Sending Logistics Messages (see "Sending Logistics Messages," page 31).

### 3.3.1 Shipping Kits (by Kit ID)

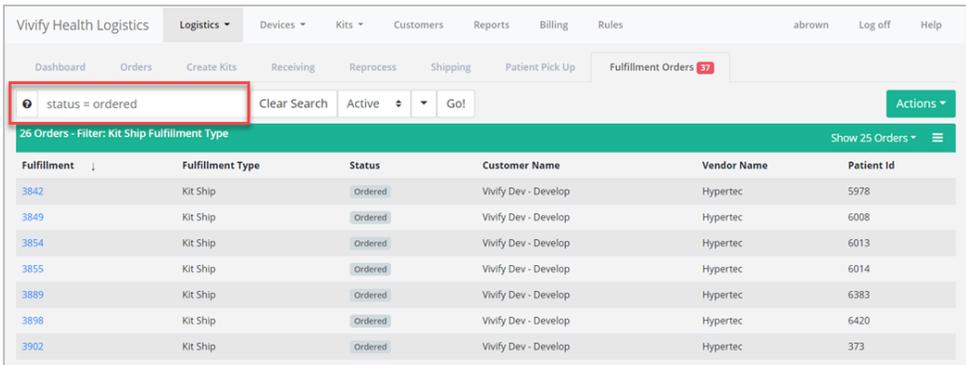
Kits can be shipped in two locations: Shipping page and Fulfillment Orders page. The Shipping page is for when you need to scan in a kit rather than working in the kit ship record. The Fulfillment Orders page contains the list of kit ship records for review and shipping processes.

#### Shipping a Kit on the Fulfillment Orders Page

1. In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab.

The Fulfillment Orders page appears.

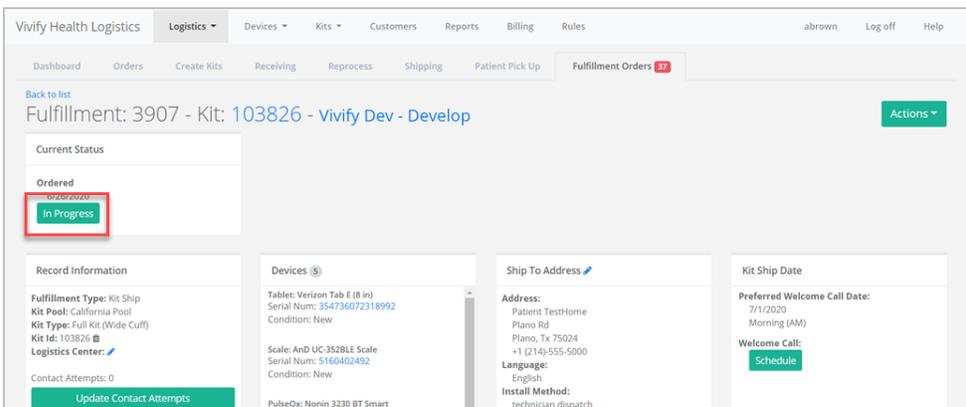
2. In the **Search** box, search for the kit by Kit ID number, Status, or other identifying information. For more information about search options, see Searching, Filtering, and Sorting on the Fulfillment Orders List page.



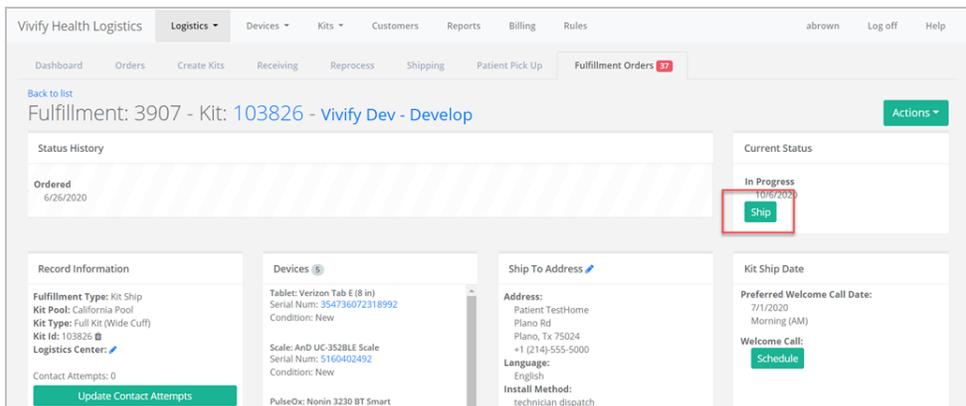
3. In the Fulfillment list, click the number to open the Fulfillment Detail page.

The Fulfillment Details page appears.

4. In the Current status area, click **In Progress**.

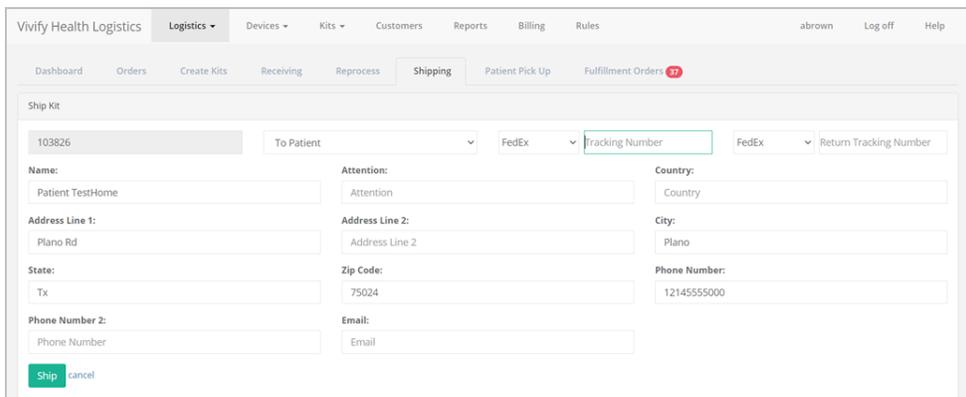


5. In the Current Status area, click **Ship**.



The Ship Kit page opens in the Shipping tab.

6. Verify the shipping information for the kit. A carrier list is available on both the Kit and Fulfillment Shipping pages. The default carrier will appear as the first option in the list. For example, for US postal codes, the default carrier in the list will appear as FedEx for both outbound and return tracking numbers. If a Canadian postal code is applied, then the carrier list default displays Purolator for both carriers. When typing the outbound tracking number, pressing ENTER switches the focus to the return tracking to maintain the workflow. The address cards on the records display the carrier and allow it to be changed.



7. Click **Ship**.

A confirmation message appears. The kit status is automatically changed to Shipped and it appears on the Fulfillment Orders page.

## Shipping a Kit on the Shipping Page

1. In the Logistics menu, click **Shipping**.

The Shipping page appears.

The screenshot shows the 'Shipping' page in the Vivify Health Logistics portal. The top navigation bar includes 'Logistics', 'Devices', 'Kits', 'Customers', 'Reports', 'Billing', and 'Rules'. The main navigation tabs are 'Dashboard', 'Orders', 'Create Kits', 'Receiving', 'Reprocess', 'Shipping', 'Patient Pick Up', and 'Fulfillment Orders' (with a red notification badge). The 'Shipping' page features a 'Ship Kit' dropdown menu, a search prompt 'Scan a kit number or select a shipping container to ship kits.', and input fields for 'Kit Number' and '-- Select Shipping Container --' with a 'Fetch' button. Below this is a section titled 'Kits Shipped Today' with a message: 'No kits shipped today.'

2. In the list, click **Ship Kit** or **Ship Fulfillment Order**.
3. Scan the kit number or select a shipping container, and then click **Fetch**.

The Ship Kit page appears.

The screenshot shows the 'Ship Kit' page in the Vivify Health Logistics portal. The top navigation bar is the same as in the previous screenshot. The main navigation tabs are 'Dashboard', 'Orders', 'Create Kits', 'Receiving', 'Reprocess', 'Shipping', 'Patient Pick Up', and 'Fulfillment Orders' (with a red notification badge). The 'Ship Kit' page features a 'Ship Kit' dropdown menu, a search prompt 'Scan a kit number or select a shipping container to ship kits.', and input fields for 'Kit Number' (containing '417232'), '-- Select Logistics Location --', '-- Carrier --', 'Tracking Number', '-- Carrier --', and 'Return Tracking Number'. Below this are several input fields for shipping information: 'Name' (Name), 'Attention' (Attention), 'Country' (Country), 'Address Line 1' (Address Line 1), 'Address Line 2' (Address Line 2), 'City' (City), 'State' (State), 'Zip Code' (Zip Code), 'Phone Number' (Phone Number), 'Phone Number 2' (Phone Number), and 'Email' (Email). At the bottom left, there is a 'Ship' button and a 'cancel' link.

4. Type the shipping information for the kit, including the Logistics Location, Carrier, Tracking Number, Name, and Address.
5. Click **Ship**.

A confirmation message appears. The kit status is automatically changed to Shipped and it appears on the Fulfillment Orders page.

To follow the kit ship record as it progresses, do the following:

1. In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab.

The Fulfillment Orders page appears.

2. In the **Search** box, search for the kit you shipped by Kit ID number or Status.
3. In the list, click the number to open the kit ship record. Review the status and kit details.

To view details about the kit, do the following:

1. In the menu, click **Kits > Kits List**.

The Kits List page appears.

2. In the **Filter** box, filter the list by Kit ID number or Status.
3. In the list, click the number to open the kit details page. Review the status and kit details.

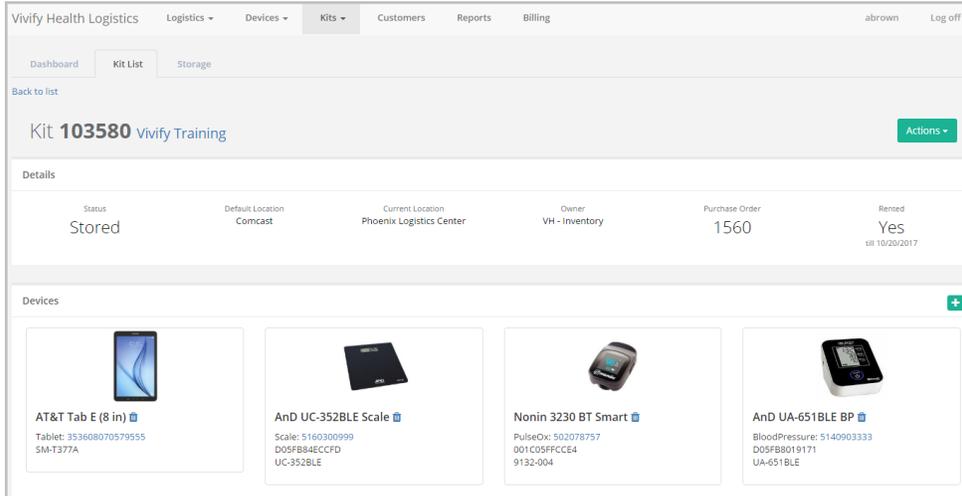
### 3.3.2 Shipping VHM Stored Kits

1. The 3PL vendor receives a shipping order on the **Orders** page of the *Logistics Portal*.

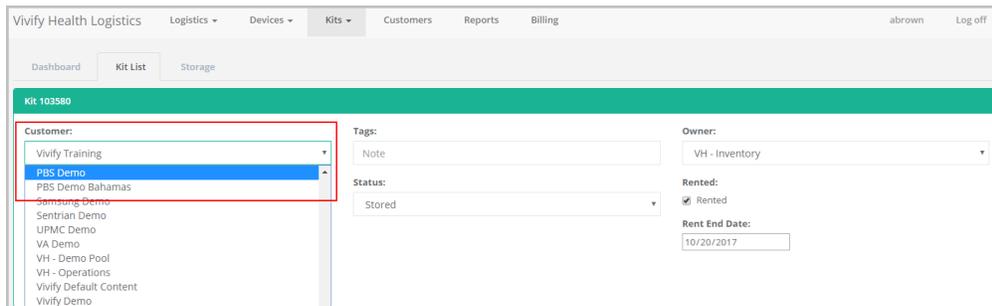
Order #	Total Kits	Customer	Summary	Created Date	Logistics Location	Created By	Completed Date
1568	5	VH - Inventory	Test inventory report	03/06/2017	Phoenix Logistics Center	mhawkins	
1560	5	Vivify Training	(5) VHK14 TESTING	02/06/2017	Phoenix Logistics Center	d.buckingham	
1511	50	Florida Accountable Care Options	(13) VHK14 (12) VHK13 (24) VHK15 (1) VHK16	01/06/2017	Phoenix Logistics Center	d.buckingham	

2. After receiving the order:
  - a. Select the **Kits > Kit List** tab.
  - b. In the **Filter by** box, type the kit number, and then click **Go**.
  - c. Click the kit number.

The kit details page appears.



- d. Click **Actions** and then **Edit Kit** to change the Customer for the kit(s) you are pulling from storage and preparing to ship.
3. From the **Customer** list, select the customer to whom you are shipping the kit, as in the following example.



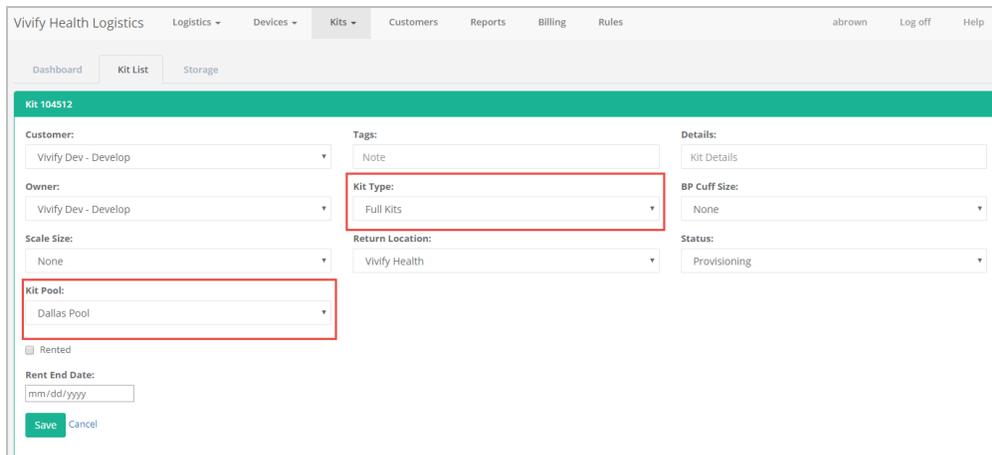
4. Click **Save** (hidden under the menu in the graphic above).
5. Turn on the tablet(s), press and hold the gear icon, input the Settings password (9729), and select **Kit Pairing**, as illustrated in Pair and Test.

The following screen displays.

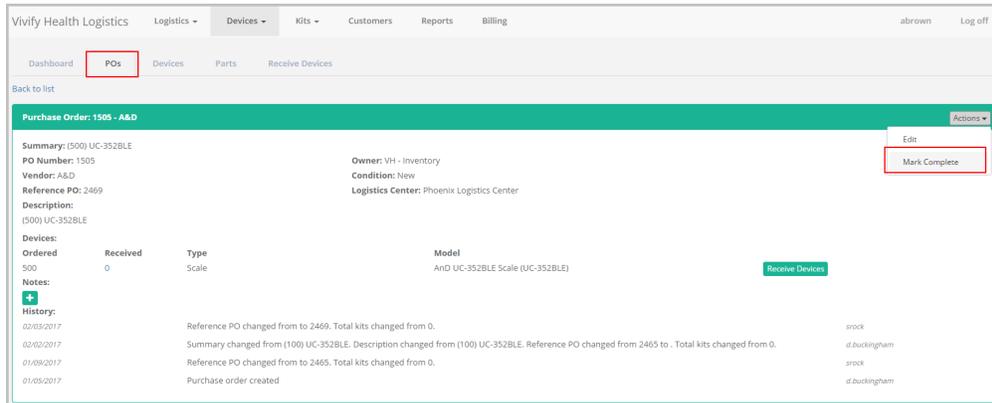


6. Tap **Refresh**.

7. Verify that the Kit Type and Kit Pool are correct.

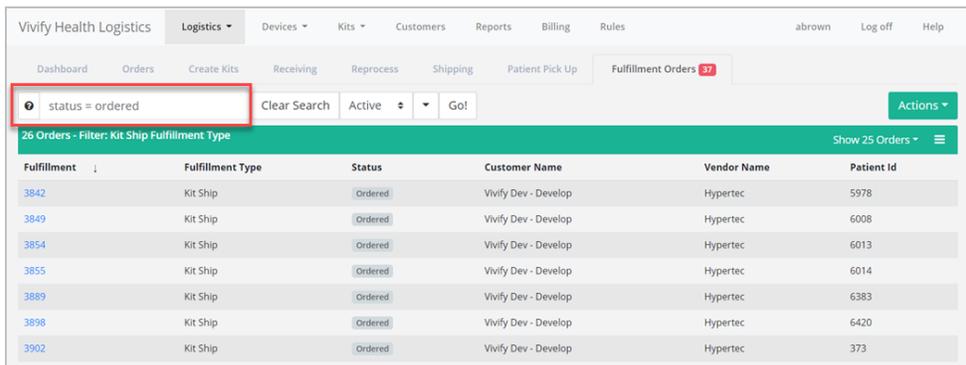


- Note the kit number and in the **Actions** menu, click **Mark Complete**.



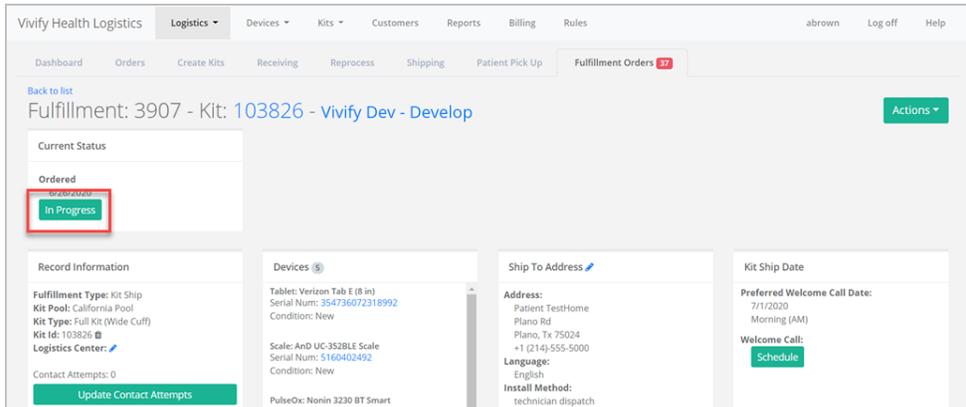
## Ship Direct to Patient

- In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab. The Fulfillment Orders page appears.
- In the **Search** box, search for the kit by Kit ID number, Status, or other identifying information. For more information about search options, see Searching, Filtering, and Sorting on the Fulfillment Orders List page.



- In the Fulfillment list, click the number to open the Fulfillment Detail page. The Fulfillment Details page appears.

4. In the Current status area, click **In Progress**.



a. Verify the Welcome video plays.

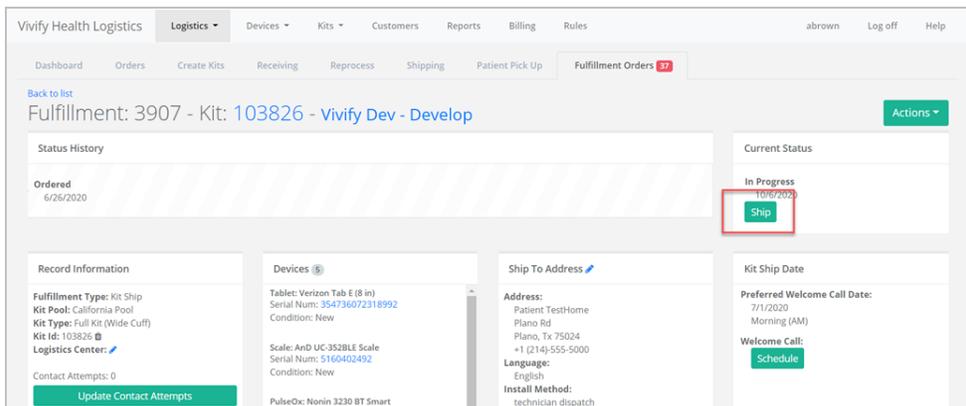


b. Verify all batteries are in the devices.

c. Verify the tablet charge is at least 50 percent.

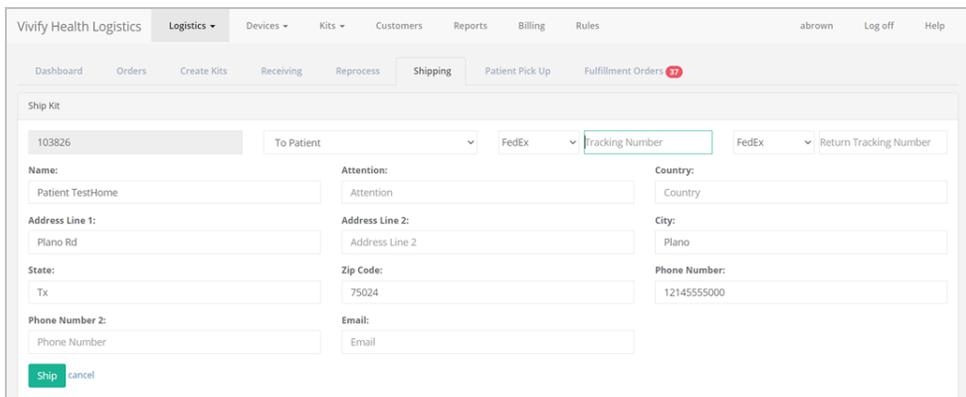
d. Verify the cellular connection.

5. In the Current Status area, click **Ship**.



The Ship Kit page opens in the Shipping tab.

6. Verify the shipping information for the kit. In the **Tracking Number** and **Return Tracking Number** boxes, type tracking numbers for the kit. A carrier list is available on both the Kit and Fulfillment Shipping pages. The default carrier will appear as the first option in the list. For example, for US postal codes, the default carrier in the list will appear as FedEx for both out-bound and return tracking numbers. If a Canadian postal code is applied, then the carrier list default displays Purolator for both carriers. When typing the outbound tracking number, pressing ENTER switches the focus to the return tracking to maintain the workflow. The address cards on the records display the carrier and allow it to be changed.



7. Click **Ship**.

A confirmation message appears. The kit status is automatically changed to Shipped and it appears on the Fulfillment Orders page.

### 3.3.3 Sending Logistics Messages

If messaging is enabled, Logistics portal users can initiate messages as well as respond to messages sent from the Care Team portal. Messages appear on the Fulfillment Orders Details page, where you can also view the kit status and kit history.

## Sending Messages to the Care Team

To send a message:

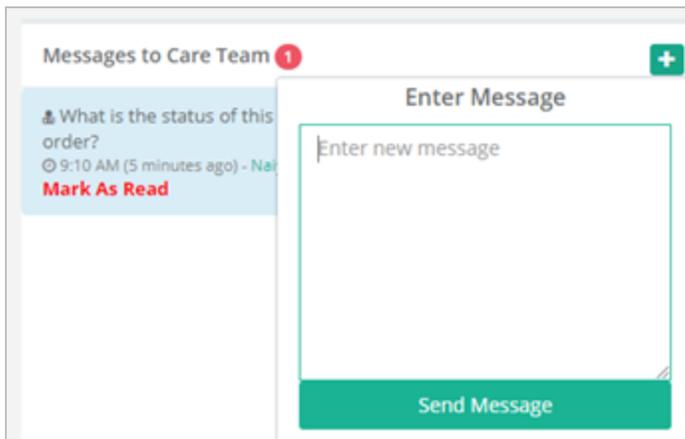
1. Click **Logistics > Fulfillment Orders**, and then click a number in the Fulfillment column.

The Fulfillment Order Detail page appears.

2. In the Messages to Care Team area, click .

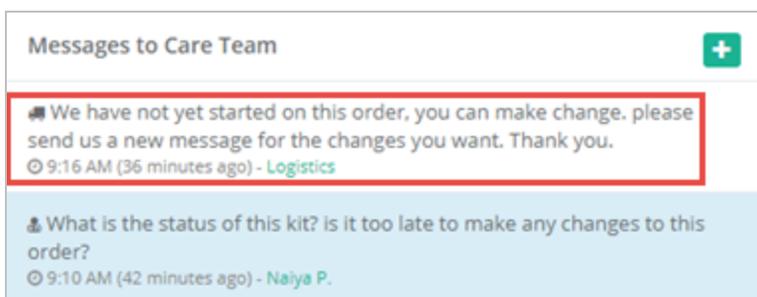
The Enter Message window appears.

3. In the **Enter new message** box, type the message you want to send to the Care Team.



4. Click **Send Message**.

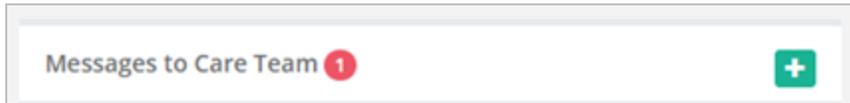
The message appears above any previous messages with the time that you sent the message and Logistics as the sender of the message.



## Marking a Message as Read

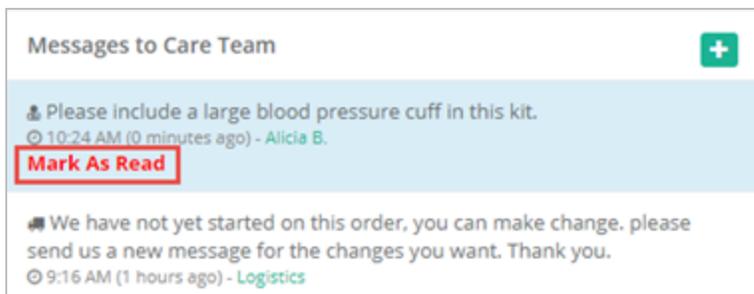
When you have an unread message, a red circle with the number of messages will appear next to the Messages to Care Team area. It is important to mark a messages a read, so the Care Team knows that you are aware of their message. This also informs

other members of the Logistics team that you have working to resolve the issue sent by the Care Team, so the work is not duplicated.

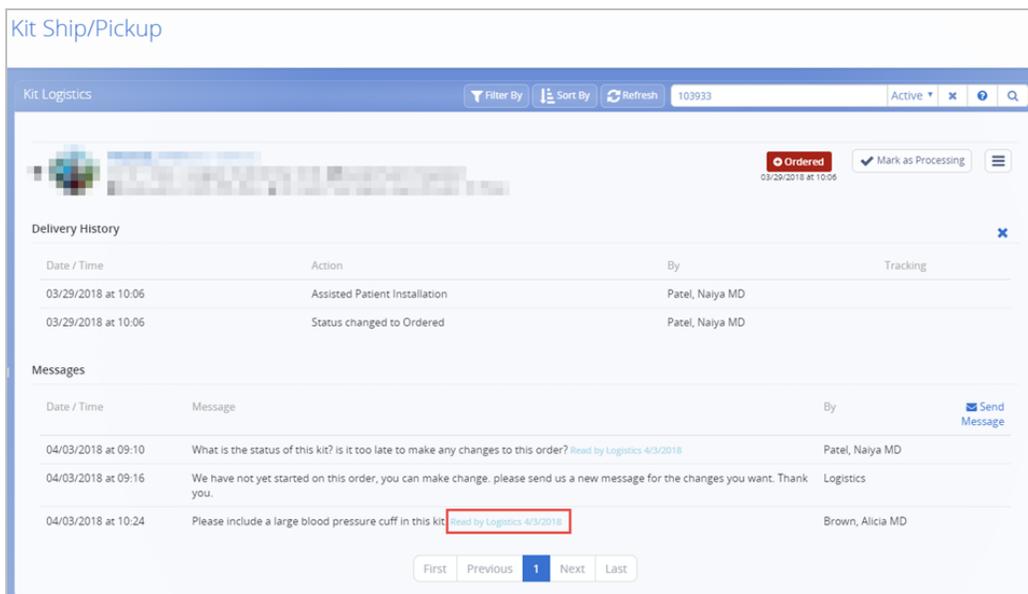


Note: Once a kit is in the Shipped status, you don't have to respond to messages that request changes as it's too late for modifications. If the kit is in Ordered or In Progress status, then address the needs of the request.

To mark a message as read, in the **Messages to Care Team** area, click **Mark As Read** below the message you want to acknowledge.



In the Care Team portal on the Kit Ship/Pickup page, the Care Team member can see that the message was read in the Message History area.



### Sorting the Kit List by Unread Messages

If the Unread column is enabled, the number of unread messages will appear in the kit list. This is helpful to quickly identify which kits need your attention as they have a pending message from the Care Team that a Logistics user has not yet marked as read.

To enable the Unread column, in the Columns menu on the list page, click **Unread** and then click **Go!**.

The screenshot shows the 'Patient Kit Ship' list with 845 kits. The 'Columns' menu is open, and the 'Unread' option is checked and highlighted with a red box. A red arrow points from the 'Unread' option in the menu to the 'Unread' column header in the table below.

Kit	Status	Contact Attempts	Welcome Call	Customer	Days	Created Date	Agent
103928	Cancelled	0		Vivify Dev - Develop	1	12:04 PM (yesterday)	
103930	Ordered	0		Vivify Dev - Develop	5	Mar 29 (5 days ago)	
103929	Ordered	0		Vivify Dev - Develop	6	Mar 29 (6 days ago)	
103932	Cancelled	0		Vivify Dev - Develop	6	Mar 29 (6 days ago)	
103933	Ordered	0		Vivify Dev - Develop	6	Mar 29 (6 days ago)	
103934	Ordered	0		Vivify Dev - Develop	8	Mar 27 (8 days ago)	
103758	Cancelled	0		Vivify Dev - Develop	8	Mar 26 (8 days ago)	
103936	Cancelled	0		Vivify Dev - Develop	8	Mar 26 (8 days ago)	
103937	Ordered	0		Vivify Dev - Develop	11	Mar 23 (11 days ago)	
103938	Shipped	0		OTN	11	Mar 23 (11 days ago)	
103939	Shipped	0		Vivify Dev - Develop	11	Mar 23 (11 days ago)	
103940	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103941	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103942	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103943	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103944	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103756	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103945	Shipped	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	
103946	In Progress	0		Vivify Dev - Develop	12	Mar 22 (12 days ago)	

Click the column title (**Unread**) to sort the table by unread messages.

The screenshot shows the 'Patient Kit Ship' list sorted by 'Unread' messages. The 'Unread' column is highlighted with a red box, and the values are sorted in descending order.

Kit	Status	Contact Attempts	Welcome Call	Customer	Days	Created Date	Agent	Logistics Center	Unread
102250	Ordered	0		Vivify Dev - Develop	71	01/22/2018			572
102247	In Progress	0		Vivify Dev - Develop	71	01/22/2018			200
102299	Ordered	0		Vivify Dev - Develop	71	01/22/2018			161
102203	Ordered	0		Vivify Dev - Develop	71	01/22/2018			103
102276	Ordered	0		Vivify Dev - Develop	71	01/22/2018			50
102295	Ordered	0		Vivify Dev - Develop	71	01/22/2018			23
103995	Ordered	0		Vivify Dev - Develop	95	12/29/2017			12
102290	Ordered	0		Vivify Dev - Develop	71	01/22/2018			10

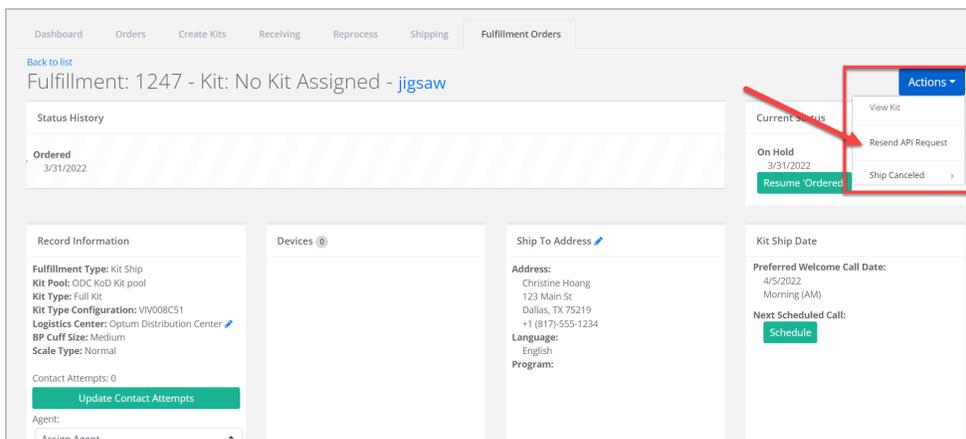
### 3.3.4 Resending an API Request

On the Fulfillment Orders Detail page for Kit Ship records, Logistics Portal users can resend API requests to contract manufacturers via the Actions menu.

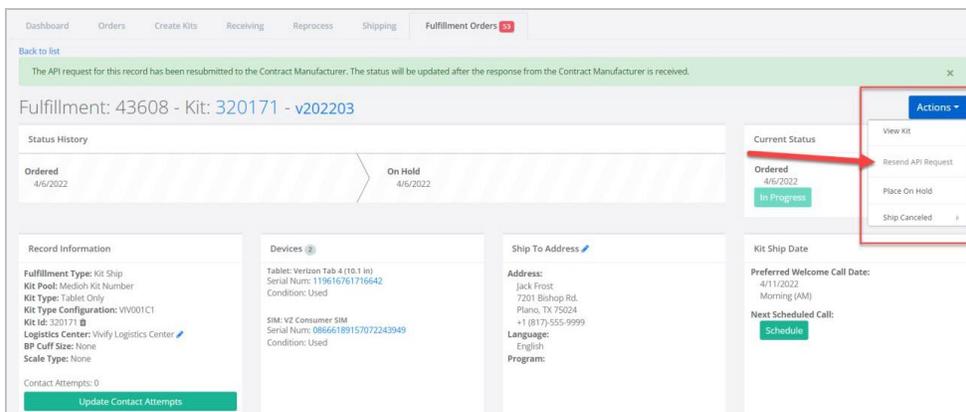
To resend an API request:

1. From the top navigation menu, click **Logistics** > **Fulfillment Orders**.
2. On the Fulfillment Orders page, in the **Actions** menu, click **Resend API Request**.

**Note:** **Resend API Request** is only accessible when the record is in On Hold or Ordered status and the last API request either failed to send or was rejected.



**Note:** If the Resend API Request option is unavailable, it will be grayed out.



3. If the order is accepted, then the fulfillment status changes to Ordered, the Internal Notes card shows that the API was sent again, and the outcome appears in the notes as *Accepted* or *Rejected*.

A confirmation message appears to confirm that the request has been submitted successfully.

## 3.4 Shipping Kits (by Kit Type) Overview

---

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

A kit pool configuration setting is available to control selecting by kit number or kit type, so this method can be used for specific customers while leaving the existing process for the rest of the customers.

In this section:

- Assigning a Kit to a Record (see "Assigning a Kit to a Record," page 36).
- Editing the Logistics Center (see "Editing the Logistics Center," page 37).
- Removing a Kit from a Kit Ship Record (see "Removing a Kit from a Kit Ship Record," page 39).
- Applying the Request by Kit Type Kit Pool Configuration (see "Applying the Request by Kit Type Kit Pool Configuration," page 46).
- Managing Kit Type Configurations (see "Managing Kit Type Configurations," page 40).
- Kit Type Master List Overview (see "Kit Type Master List Overview," page 42).
- Adding a New Kit Type to the Kit Type Master List (see "Adding a New Kit Type to the Kit Type Master List," page 43).
- Editing the Kit Type Master List (see "Editing the Kit Type Master List," page 45).
- Applying the Request by Kit Type Kit Pool Configuration (see "Applying the Request by Kit Type Kit Pool Configuration," page 46).
- Adding a Network Carrier to a Kit Pool (see "Adding a Network Carrier to a Kit Pool," page 48).

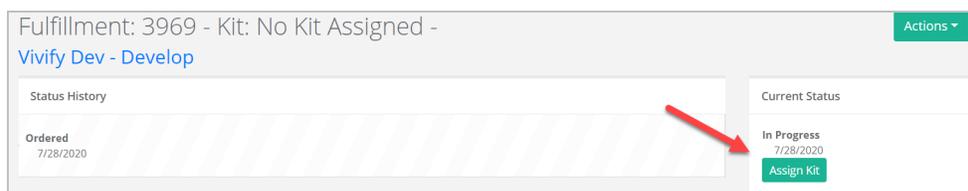
### 3.4.1 Assigning a Kit to a Record

---

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

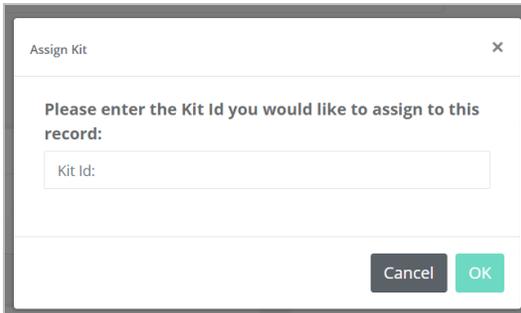
To assign a kit to a kit ship record:

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.



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 Details page. Also, the action is recorded in the Care Team Portal and Logistics Portal history.

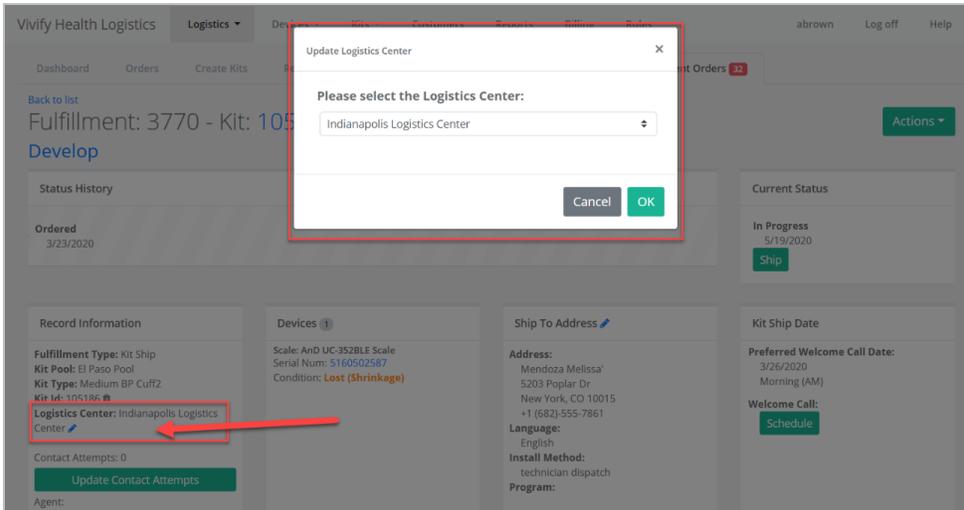
### 3.4.2 Editing the Logistics Center

---

You can change the Logistics center on Fulfillment records. 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.

To edit the logistics center:

1. In the menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Detail page, in the **Record Information** section, click the Logistics Center edit icon. If the kit is in a Shipped status, the edit icon is not available.



The Update Logistics Center window appears.

3. In the list, select the Logistics center you want to apply to the record.
4. Click **OK**.

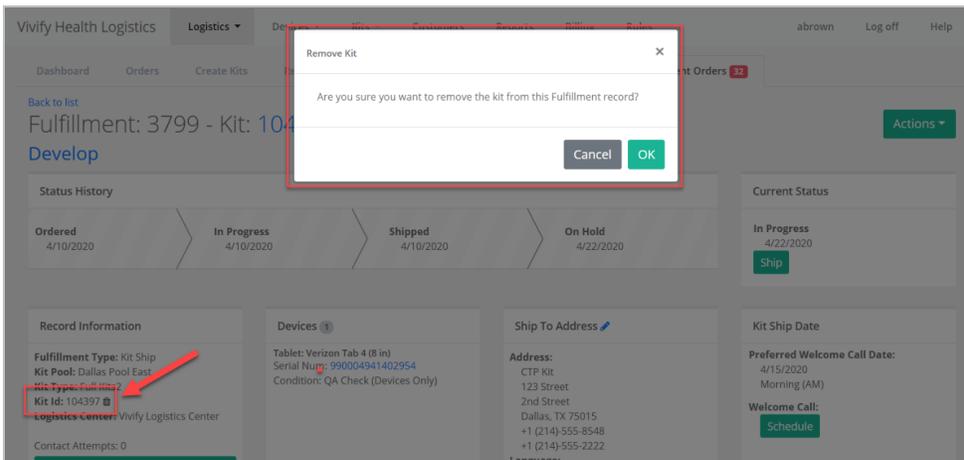
The Logistics Center is updated and the action is recorded in the Logistics Portal history and the Care Team Portal history.

### 3.4.3 Removing a Kit from a Kit Ship Record

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

To remove a kit from a kit ship record:

1. In the menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Detail page, in the **Record Information** section, click the Kit Id remove icon. The remove (trash can) icon is visible if the kit is in the Ordered or In Progress status.



The Remove Kit window appears.

3. In the confirmation window, select **OK**.

The kit is removed from the record. The kit is returned to the Stored status in the Logistics Portal and the Available status in the Care Team Portal. The following note is added to the Logistics Portal history: "Kit 123456 was removed from this record." The following note is added to the Care Team Portal history: "Kit 123456 was removed from this record and unassigned from the patient."

### 3.4.4 Managing Kit Type Configurations

---

#### Definitions

- **Convenience Kit:** Refers to different kit components packaged together as a finished product to be distributed to an end-user. Defined in the regulations as a device that contains two or more different medical devices packaged together and intended to remain packaged together and not to be replaced, substituted, repackaged, sterilized, or otherwise processed or modified before being used by an end user. The definition of kit also encompasses finished products that do not contain a medical device (such as a tablet with preloaded RPM Software only) or that contains a single medical (such as tablet with preloaded RPM Software and a weight scale only).
- **Kit Component:** Refers to any item/part composing a kit and includes: OEM medical device, OEM wellness device, OEM non-medical product (tablet, cable, batteries), packaging, and labeling materials.
- **Kit Type:** Refers to a group of kit components that can be assembled in multiple pre-defined configurations. The Kit Type Master List currently includes 14 variations.
  - Tablet Only (VIV001)
  - Full Kit + Glucose Meter + Thermometer (VIV002)
  - Tablet + Scale (VIV003)
  - Tablet + Glucose Meter (VIV004)
  - Tablet + PulseOx (VIV005)
  - Tablet + BP (VIV006)
  - Tablet + Scale + BP (VIV007)
  - Full Kit (VIV008)
  - Tablet + BP + PulseOx (VIV009)
  - Full Kit + Thermometer (VIV010)
  - Full Kit + Glucose Meter (VIV011)
  - Tablet + Scale + BP + Glucose Meter (VIV012)
  - Tablet + BP + PulseOx + Glucose Meter (VIV013)
  - Full Kit + Pedometer (VIV014)
- **Kit Configuration:** Combination of specific models/part numbers/versions of components composing a finished kit. The combinations of devices and materials in the kit spec docs are called a *kit type configurations*. Each configuration is given its own *kit type configuration ID* (such as VIV001C1).

- **Kit Type Specifications:** *Kit type specification documents* (also known as "kit type spec docs") list the various combinations of devices and materials that can be used for each *kit type*. Each kit type spec doc is assigned a *kit type specification ID* for reference (such as SPEC00294).

## How It Works

When Care Team Portal users assign the +Home service level, the Logistics Portal determines the kit type configuration and sends that data to contract manufacturers for shipping. This information then displays in the Kit Type Configuration field on the **Fulfillment Details > Record Information** card.

**Note:** The Kit Type Configuration field appears for all new orders, but this field may be blank for older orders.

Kit type configurations are determined based on the following fields:

- Configuration Name
- Network Carrier (assigned to the kit pool)
- Selected Kit Type (at the time the +Home service level was assigned)
- Selected BP Cuff size (when supported by the kit type)
- Selected Scale Type (when supported by the kit type)
- Vendor
- Return Carrier (to the kit pool)

### 3.4.5 Kit Type Master List Overview

The Kit Type Master List page coordinates and standardizes all types of kits in one location. The previous kit type names were migrated to the new Kit Type Master List page so that the new list contains all the updated values. As part of the kit type migration, kit type names and descriptions were updated to a standardized format, which is visible in the Care Team Portal on the Kits page.

The Kit Type Master list can only be accessed with the Vivify Logistics user role.

You can do the following:

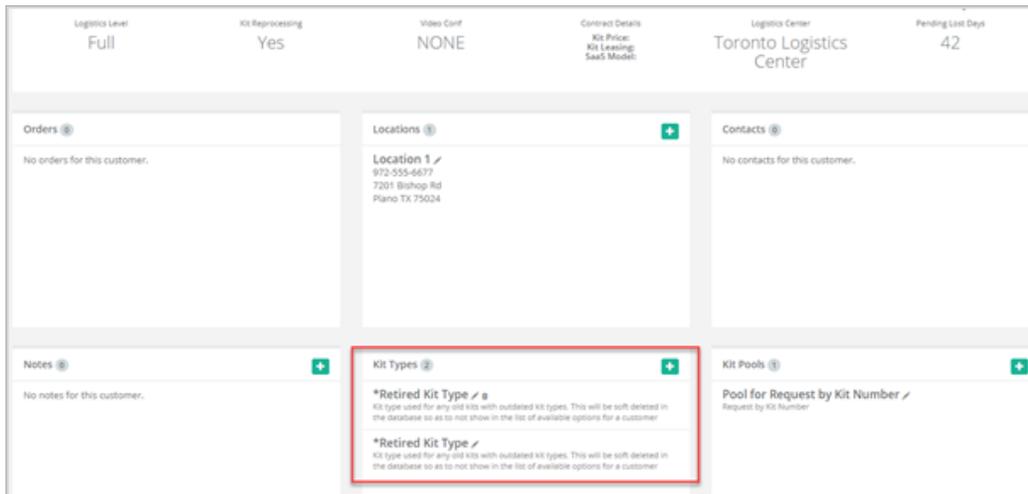
- [Adding a New Kit Type](#)
- [Editing a Kit Type](#)

#### Example: Kit Type Master List

Kit Type Name	Description	SKU	Creation Date	Created By	Last Updated Date	Last Updated By
Full Kit	Convenience Kit 008 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Scale • 1 Pulse Oximeter • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV008	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Full Kit + Glucometer	Convenience Kit 011 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Scale • 1 Glucometer • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Pulse Oximeter • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV011	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Full Kit + Glucometer + Thermometer	Convenience Kit 002 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Scale • 1 Glucometer • 1 Pulse Oximeter • 1 BP Monitor • 1 BP Cuff • 1 Thermometer • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV002	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Full Kit + Pedometer	Convenience Kit 014 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Scale • 1 Pulse Oximeter • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Pedometer • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV014	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Full Kit + Thermometer	Convenience Kit 010 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Scale • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Pulse Oximeter • 1 Thermometer • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV010	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Tablet + BP	Convenience Kit 006 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV006	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Tablet + BP + PulseOx	Convenience Kit 009 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Pulse Oximeter • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV009	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI

### Example: Customers > Kit Types Section

On the Customer detail page, in the Kit Type Name on the Kit Type section, Kit Type names can only be selected from the Kit Type Master List.



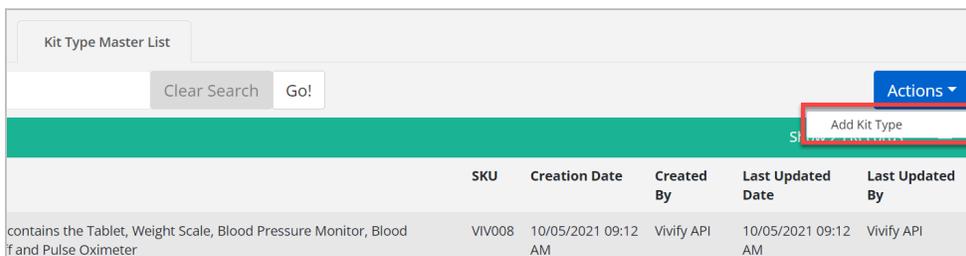
### 3.4.6 Adding a New Kit Type to the Kit Type Master List

Users with the Vivify Logistics role can add a new kit type to the Kit Type Master List.

Before adding a new kit type, verify that the appropriate documentation and specifications have been approved by the Vivify Product team.

To add a kit type to the Kit Type Master List:

1. From the menu, click **Kits > Kit Type Master List**.
2. On the Kit Type Master List page, in the **Actions** menu, click **Add Kit Type**.



The New Kit Type window appears.

3. Do the following:

- a. In the **Kit Type Name** field, type a name for the kit type (such as **Full Kit**).
- b. In the **SKU/Part Number** field, type the part number or SKU.
- c. In the **Description** field, type a description of the kit's contents.

Both the New Kit Type and Edit Kit Type windows contain an **Icon** field, but it is optional and read-only. (Syncing Kit Type data from the Logistics Portal to the Care Team Portal includes the **Icon** field.)

4. Click **Save**.

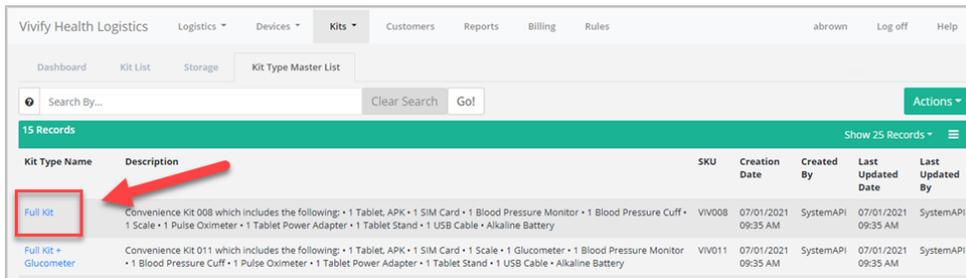
The kit type is added to the list and the values in the columns for **Creation Date** and **Created By** are also updated.

### 3.4.7 Editing the Kit Type Master List

The Kit Type Master List can be edited by users with the Vivify Logistics user role.

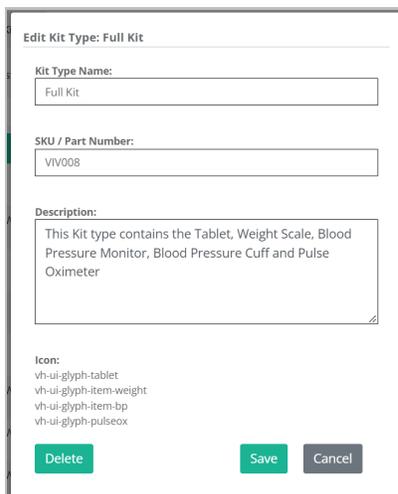
To edit a kit type in the Kit Type Master List:

1. From the menu, click **Kits** > **Kit Type Master List**.
2. On the Kit Type Master List page, in the **Kit Type Name** column, click the kit type name.



Kit Type Name	Description	SKU	Creation Date	Created By	Last Updated Date	Last Updated By
Full Kit	Convenience Kit 008 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Scale • 1 Pulse Oximeter • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV008	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI
Full Kit + Glucometer	Convenience Kit 011 which includes the following: • 1 Tablet, APK • 1 SIM Card • 1 Scale • 1 Glucometer • 1 Blood Pressure Monitor • 1 Blood Pressure Cuff • 1 Pulse Oximeter • 1 Tablet Power Adapter • 1 Tablet Stand • 1 USB Cable • Alkaline Battery	VIV011	07/01/2021 09:35 AM	SystemAPI	07/01/2021 09:35 AM	SystemAPI

The Edit Kit Type window appears.



Kit Type Name:  
Full Kit

SKU / Part Number:  
VIV008

Description:  
This Kit type contains the Tablet, Weight Scale, Blood Pressure Monitor, Blood Pressure Cuff and Pulse Oximeter

Icon:  
vh-ui-glyph-tablet  
vh-ui-glyph-item-weight  
vh-ui-glyph-item-bp  
vh-ui-glyph-pulseox

Delete Save Cancel

Both the Edit Kit Type and New Kit Type windows contain an **Icon** field, but it is optional and read-only. (Syncing Kit Type data from the Logistics Portal to the Care Team Portal includes the **Icon** field.)

3. Do any of the following:
  - a. In the **Kit Type Name** box, type a name for the kit type (such as **Full Kit**).
  - b. In the **SKU/Part Number** box, type the part number or SKU.
  - c. In the **Description** box, type a description of the contents of the kit.
4. Click **Save**.

The kit type is updated in the list and the values in the columns for **Last Updated Date** and **Last Updated By** are also updated.

### 3.4.8 Applying the Request by Kit Type Kit Pool Configuration

Logistics Portal users can apply the Request by Kit Type configuration setting to control selecting by kit number or kit type. This method can be applied to specific customers while leaving the existing process in place for the rest of the customers.

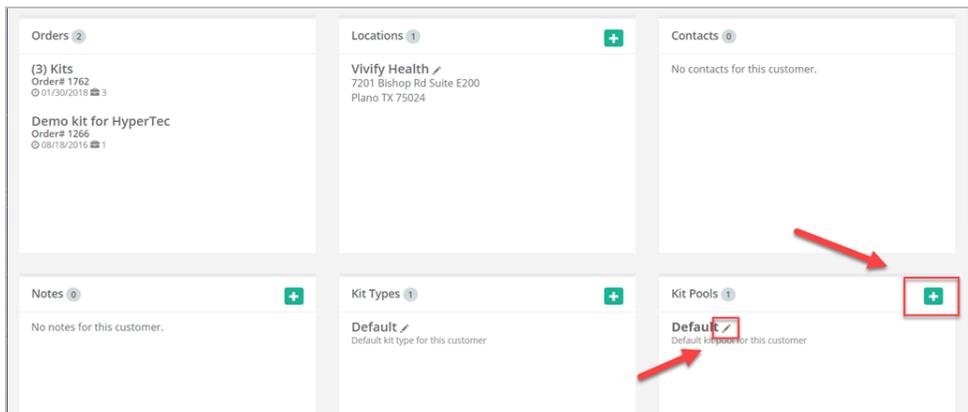
This configuration is only available for Logistics Portal users with Vivify Support permissions, and is accessible for users with the Vivify Support role on the Customers page in the Kit Pools area.

To apply the Request by Kit Type configuration:

1. Click the **Customer** tab.
 

A table of customer names appears.
2. In the table, click a customer name.
 

The Customer page appears with details about that customer's configurations.
3. In the **Kit Pools** section, click the **plus (+)** icon to add a new kit pool or the **edit** (✎) icon to make changes to the current kit pool.



The Kit Pool Customer page appears.

4. Select **Enable Request by Kit Type** to apply the setting.

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

**Example : Enable Request by Kit Type Configuration Option in the Customers > Edit Kit Pool Window**

Customer: 100028

Name: California Pool

Description: Pool for all kits that reside in california

Site: Vivify West

Billing Account Number: CA001

Sort Order: 2

Default Customer Location: Vivify Health Dev

Enable Request by Kit Type

Ship to Patient

Pick Up from Patient

Ship to Customer

Does Reprocessing

Store For Customer

Auto Complete Kit Ship

Default Pool

Default Selected in Care Team Portal

Save Cancel

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

New Kit Pool

Name:  
Name

Description:  
Description

Logistics Options

Ship To Customer  
 Ship To Patient  
 Pick Up from Patient

Reprocessing  
 Store for Customer  
 Auto Complete Kit Ship

Default Customer Location:  
-- Select Location --

Billing Account Number:  
Billing Account Number

Sort Order  
Sort Order

Logistics Location Type:  
-- Select Logistics Location Typ --

Site  
Select Site

Network Carrier:  
-- Select Network Carrier --

Expected Kit Mobi Path  
-- Select Mobi Path --

Default Pool  
 Default Selected in Care Team Portal  
 Ignore Sim Validation  
 Enable Request by Kit Type

Save Cancel

### 3.4.9 Adding a Network Carrier to a Kit Pool

Logistics Portal users must select a network carrier for each kit pool. A migration script ensures that all existing kit pools are assigned a carrier.

To add a network carrier to a kit pool:

1. Click the **Customer** tab.

A table of customer names appears.

2. In the table, click a customer name.

The Customer page appears with details about that customer's configurations.

3. In the **Kit Pools** section, click the **plus (+)** icon to add a new kit pool.

The New Kit Pool window appears.

4. In the New Kit Pool window, in the **Network Carrier** list menu, select one of the following options:

- AT&T
- Verizon
- T-Mobile
- Rogers (Canada)
- Various

5. Click **Save**.

### 3.5 Managing Kit Component Replacements

Logistics Portal users can replace parts and devices assigned to a kit and apply a reason for the replacement. This allows the patients to receive the necessary replacements and for all records to be linked to the kit. All active parts (non-serialized devices) and devices (serialized devices) currently included in the kit now display so that they can be selected for replacement.

Parts and devices are tracked with internal part numbers, which allows for easy correlation with the Master Parts List.

In this section:

- Replacing Kit Components (see "Replacing Kit Components," page 50).
- Tracking Component Replacement Reasons (see "Tracking Component Replacement Reasons," page 57).
- Requesting Replacement Batteries (see "Requesting Replacement Batteries," page 59).
- Viewing Replacement Device History (see "Viewing Replacement Device History," page 65).
- Viewing Internal Part Numbers (see "Viewing Internal Part Numbers," page 66).
- Viewing Tracking Numbers (see "Viewing Tracking Numbers," page 68).
- Kit Device Replacement Messaging (see "Kit Device Replacement Messaging," page 71).
- Mass Assigning Agents to Records (see "Mass Assigning Agents to Records," page 73).
- Exporting the Fulfillment Orders List (see "Exporting the Fulfillment Orders List," page 74).

### **3.5.1 Replacing Kit Components**

---

Devices within kits are sometimes broken or missing and need to be replaced. The device can be replaced from the Kit Details page or from the Fulfillment Orders Detail page for orders in progress. This process is different from the process within the Reprocessing Checklist.

## Replacing Kit Components (Kit Details Page)

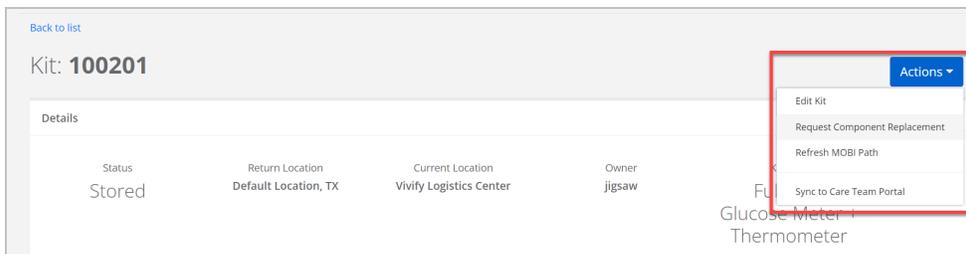
On the Kit Details page, in the Actions menu, you can click **Request Component Replacement** to replace a device or part. This process has three steps: choosing the device to replace, confirming shipping information, and confirming the order.

To replace a device in a kit on the Kit Details page:

1. In the top navigation menu, click **Kits > Kit List**.
2. In the Kit List, search for the kit with the device you want to replace, and then click the kit number.

The Kit Details page appears.

3. On the Kit Details page in the **Actions** menu, click **Request Component Replacement** to begin the process for replacing a device or part.



The Request Component Replacement window appears.

4. In the Request Component Replacement window, do the following:
  - a. Select the box of the component that needs to be replaced.

**Note:** If you are selecting batteries as the components to replace, see the topic **Requesting Replacement Batteries** for more details.

- b. In the Additional Information box, type a note to explain why the device is being replaced.

- c. In the **Support Case Number** box, type the coordinating number for the support case.

Component	Replace	Batteries
SIM Card	<input type="checkbox"/>	
Tablet	<input type="checkbox"/>	

Replacement Reason:  
-Select Component Replacement Reason- ✕ ▾

Additional Information:  
Enter note

Support Case Number:  
Enter Support Case Number (required)

Cancel Next

5. Click **Next**.

The Request Component Replacement - Shipping Information window appears. The address will be populated automatically if the information is available in the Care Team Portal. If the address does not transfer, type the details manually.

### Request Component Replacement - Shipping Information

Client: jigsaw      Kit #: 100199      Kit Type: Tablet Only

**First Name:**  ✓      **Last Name:**  ✓

**Address Line 1:**  ✓

**Address Line 2:** (optional)

**City:**  ✓

**State:**  ✓      **Zip Code:**  ✓

6. Click **Next**.

The Request Component Replacement - Confirmation window appears.

### Request Component Replacement - Confirmation

**Customer:** jigsaw  
**Kit Number:** 100199  
**Address:** Pedro Almodovar  
 7890 Canyon Way  
 Albuquerque, NM  
 87101  
 +1 (890) 553-0978

**Order:**  
 1 SIM Card  
 1 Tablet

**Replacement Reason:** Not Transmitting (C)

**Additional Information:**  
**Support Case #:** 48390587623456

7. Review all of the information for the component replacement request and then click **Confirm**.

After confirmation, the window closes and the Kit Details page is visible again. A green banner appears at the top of the page with a success message to inform you that the request was placed and a record is created in the history to track the request.

## Replacing Kit Components (Fulfillment Orders Detail Page)

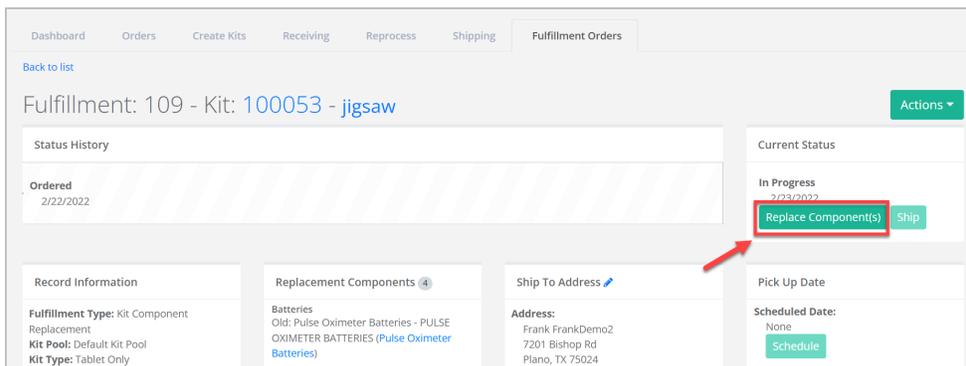
When a Kit Component Replacement order is In Progress, the **Replace Component(s)** button is available. All requested devices must be marked as replaced before users can select **Ship**.

To replace a device in a kit on the Fulfillment Orders page:

1. In the top navigation menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Order list page, click the number of the In Progress record for the device you want to replace.

The Fulfillment Order Detail page appears.

3. Click **Replace Component(s)**.



If the kit contains more than one component, the Replace Components window opens so that you can choose which device to replace.

Component	Replace
BP Cuff	<button>Replace</button>
Pulse Oximeter Batteries	<button>Replace</button>
Scale Batteries	<button>Replace</button>
SIM	<button>Replace</button>

Close

The Replace Components window appears.

**Replace SIM**

**Why are you replacing this Component?**

QA Check

**Comment:**

Enter new note

**New Component:**

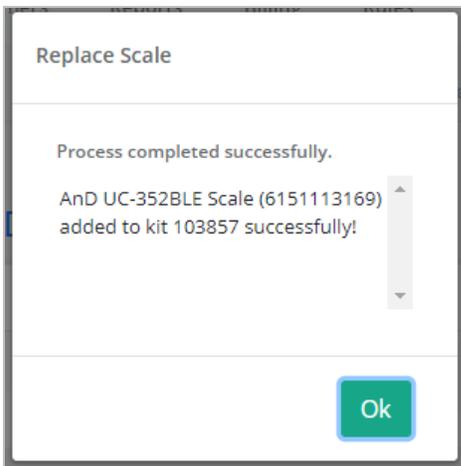
Scan serial num or Part Num

Cancel Replace

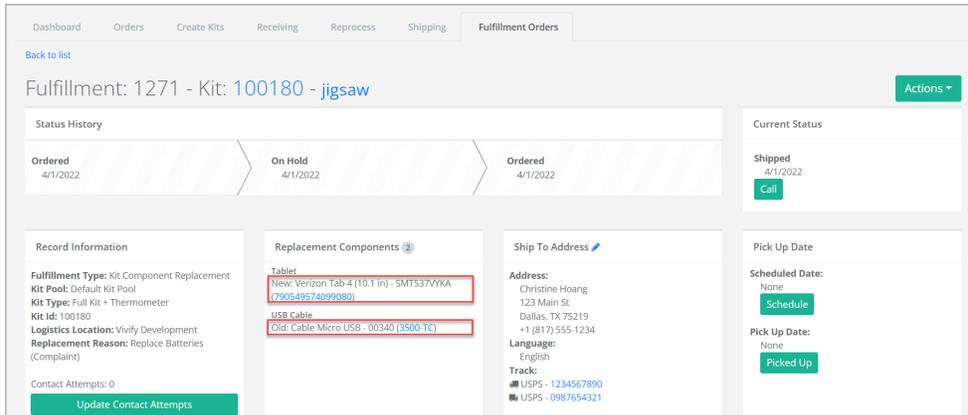
4. In the Replace Components window, do the following:
  - a. In the **Why are you replacing this Component?** list, select **QA Check**, **Physical Damage**, or **Purchased**.
  - b. In the **Comment** box, type the reason for the replacement, such as the device is broken.

**Note:** For more details on replacement reasons, see the topic **Tracking Component Replacement Reasons**.

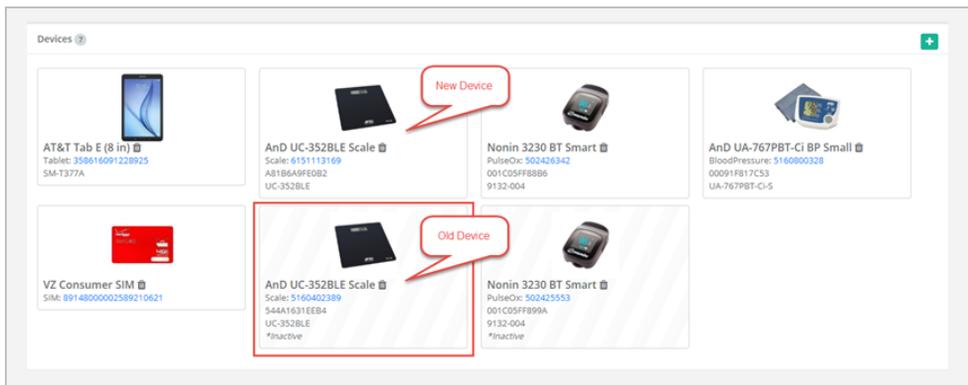
- c. In the **New Component** box, scan or type the serial number of the new device.
5. Click **Replace**. The scale is replaced and a confirmation message appears: "Process completed successfully." If it fails, an error message appears: "No component replacement request was created."
6. Click **OK**.



The new and old scale serial numbers are visible in the Replacement Components section.



7. After replacing a device, the kit (**Kits > Kit List > Kit Details** page) will show the replaced device as inactive. The fulfillment history and kit detail history are updated.



### 3.5.2 Tracking Component Replacement Reasons

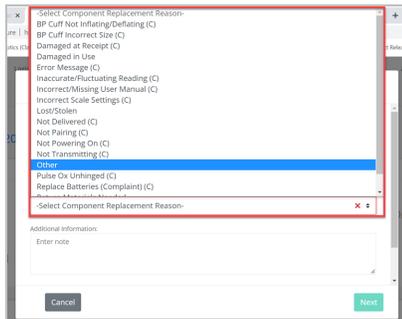
Logistics Portal users can choose a replacement reason from the **Replacement Reason** list menu on the Request Component Replacement page. The Replacement Reason list shows its options in alphabetical order and is a required field.

**Note:** Component replacement is described in detail in the topic Replacing Kit Components.

## Complaints

Many replacement reasons are also *complaints* (any communication that alleges a problem in one of our medical devices after its release). Regardless of how complaints are received, they are recorded in Zendesk as one of the first steps in the Corrective and Preventative Actions (CAPA) process. This process investigates root causes to ensure that complaints do not recur.

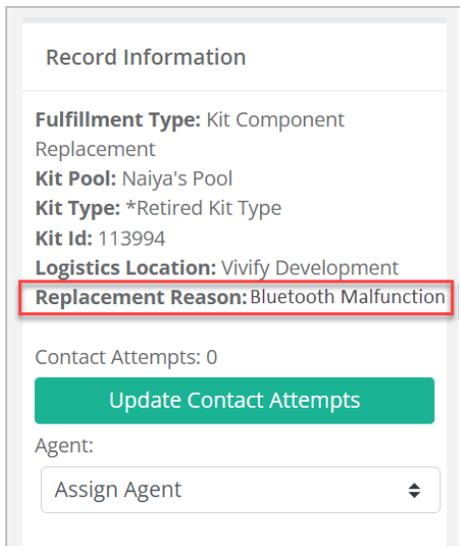
If an option in the Replacement Reason list is a complaint, the text (C) appears next to it to denote it as such.



## Where to Find Replacement Reasons

### Record Information Card

Replacement reasons appear on the Record Information card of the Fulfillment Orders Detail page of Kit Component Replacement records.



## Shrinkage Note

Replacement reasons may also appear in the Shrinkage Note on the reprocessing record, making this information readily available without running the Shrinkage Report (for example: *Removed from kit {kit.KitId} during kit device replacement fulfillment {fulfillmentId}*).

The screenshot displays a user interface for managing devices and parts. It is divided into several sections:

- Devices:** A grid of device cards, each with an image and details. The devices shown are:
  - Verizon Tab E (8 in): Tablet: 354736072351134, SM: T377V2KAVZW. Includes a 'Replace' button.
  - AnD UC-352BLE Scale: Scale: S160402617, 544A1631F163, UC-352BLE. Includes a 'Replace' button.
  - Nonin 3230 BT Smart: PulseOx: 502217062, 001C56FFB806, 9132-004. Includes a 'Replace' button.
  - AnD UA-651BLE BP: BloodPressure: 5140600408, 20C0397C19C9, UA-651BLE. Includes a 'Replace' button.
- VZ Consumer SIM:** SIM: 0914050002590227765. Includes a 'Replace' button.
- Parts:** A list of various parts, each with a 'Replace' button:
  - BP Cuff UA-291: BP Cuff Large (Fit: UA-651) SZ: 12.2"-12.7"
  - USB Cable 3500-TC: CABLE Micro USB
  - Stand 3203-TS-L: Tablet Stand w/Logo
  - FOAM VIV9499: Foam Standard Kit (Black Foam)
  - Box Handle 350091030: Handle
- Consumable Parts:** A list of consumable parts:
  - KIT BOX VIV9498: Kit Box Standard Kit (No Black Foam)
  - Batteries BAT-AAA (2): AAA batteries (Nonin 3230 BT Smart)
  - Batteries BAT-AA (4): AA batteries (AnD UA-651BLE BP)
  - Batteries BAT-AA (4): AA batteries (AnD UC-352BLE Scale)
- Shrinkage:** A red-bordered box containing two entries:
  - Scale AnD UC-352BLE Scale (S160402617) added to kit: 103427 during reprocessing 2922
  - Scale AnD UC-352BLE Scale (S160402617) replaced for kit: 103427 during reprocessing 2922

### 3.5.3 Requesting Replacement Batteries

In the Request Component Replacement window, Logistics Portal users can now select replacement batteries for existing kit devices more easily. When a user selects the **Batteries** checkbox next to a device, a checkbox will appear on the confirmation page and the subsequent Fulfillment Detail page as **[Device Type] Batteries**.

**Note:** The following component types will not appear in the list of requestable components: Batteries, Documents, Guide, Label, Letter, Manual, User Guide, and User Insert.

You can replace batteries from either the Kit page or the Fulfillment Orders Detail page.

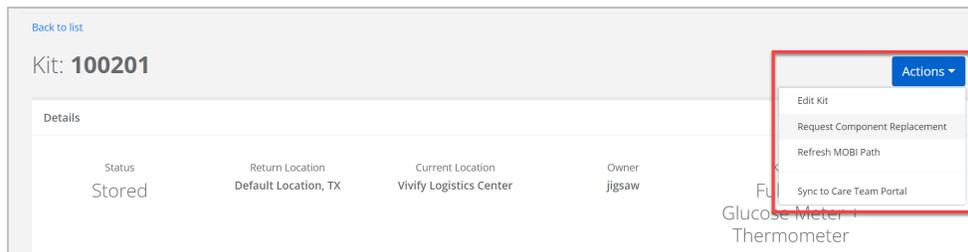
## From the Kit Page

To request replacement batteries from the Kit page:

1. In the top navigation menu, click **Kits > Kit List**.
2. In the list, search for the kit with the device you want to replace, and then click the kit number.

The Kit Details page appears.

3. On the Kit Details page in the **Actions** menu, click **Request Component Replacement** to begin the process for replacing a device or part.



The Request Component Replacement window appears.

4. In the Request Component Replacement window, do the following:
  - a. Select the checkbox for the batteries that need to be replaced.

**Note:** Users can no longer select a device and its batteries for replacement simultaneously. This reduces confusion on what the agent should select and what the contract manufacturer should fulfill.

- b. In the **Additional Information** box, type a note to explain why the batteries are being replaced.

- c. In the **Support Case Number** field, type the coordinating number for the support case.

Component	Replace	Batteries
SIM Card	<input type="checkbox"/>	<input type="checkbox"/>
Tablet	<input type="checkbox"/>	

Replacement Reason:  
-Select Component Replacement Reason- ✖ ▾

Additional Information:  
Enter note

Support Case Number:  
Enter Support Case Number (required)

Cancel Next

5. Click **Next**.

The Request Component Replacement - Shipping Information window appears. The address will be populated automatically if the information is available in the Care Team Portal. If the address does not transfer, type the details manually.

### Request Component Replacement - Shipping Information

Client: jigsaw      Kit #: 100199      Kit Type: Tablet Only

**First Name:**  ✓      **Last Name:**  ✓

**Address Line 1:**  ✓

**Address Line 2:** (optional)

**City:**  ✓

**State:**  ✓      **Zip Code:**  ✓

6. Click **Next**.

The Request Component Replacement - Confirmation window appears.

### Request Component Replacement - Confirmation

**Customer:** jigsaw  
**Kit Number:** 100199  
**Address:** Pedro Almodovar  
 7890 Canyon Way  
 Albuquerque, NM  
 87101  
 +1 (890) 553-0978

**Order:**  
 1 SIM Card  
 1 Tablet

**Replacement Reason:** Not Transmitting (C)

**Additional Information:**  
**Support Case #:** 48390587623456

7. Review all of the information for the component replacement request and then click **Confirm**.

After confirmation, the window closes and the Kit Details page is visible again. A green banner appears at the top of the page with a success message to inform you that the request was placed and a record is created in the history to track the request.

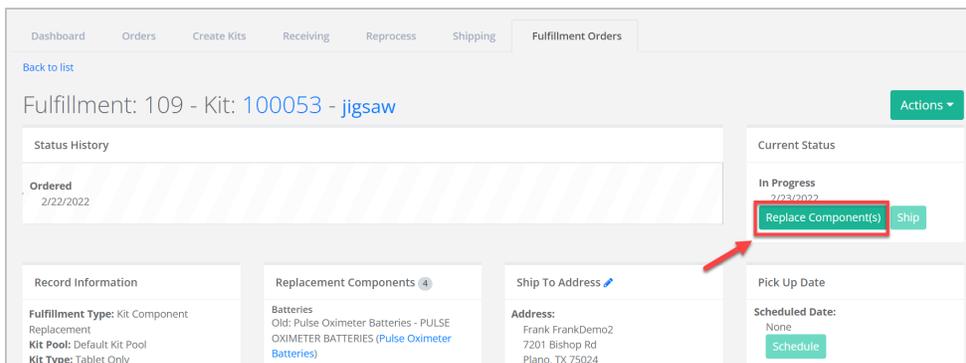
## From the Fulfillment Order Page

To request replacement batteries from the Fulfillment Order Detail page:

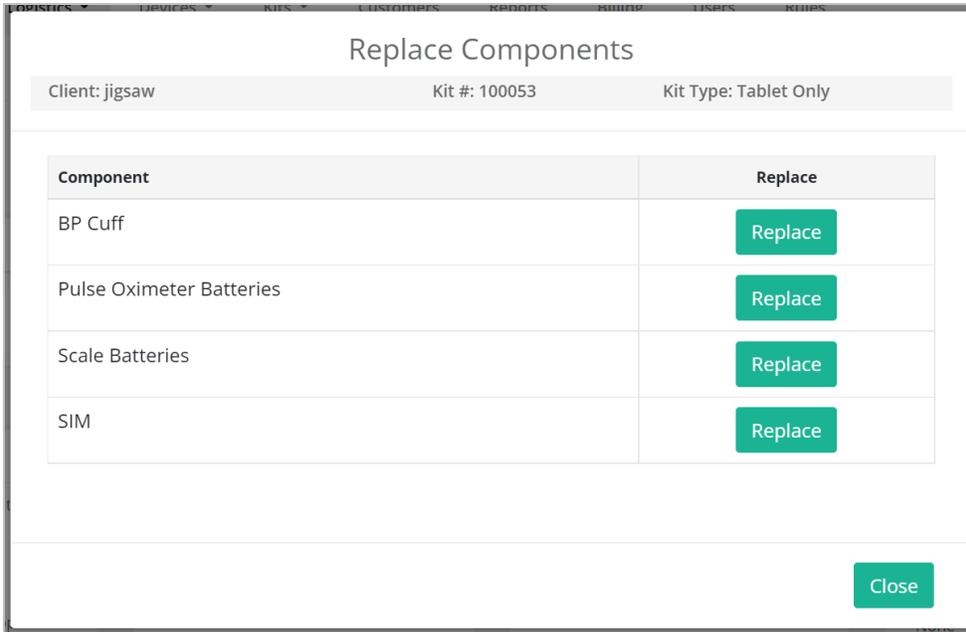
1. In the top navigation menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Order list page, click the number of the In Progress record of a device you want to replace.

The Fulfillment Order Detail page appears.

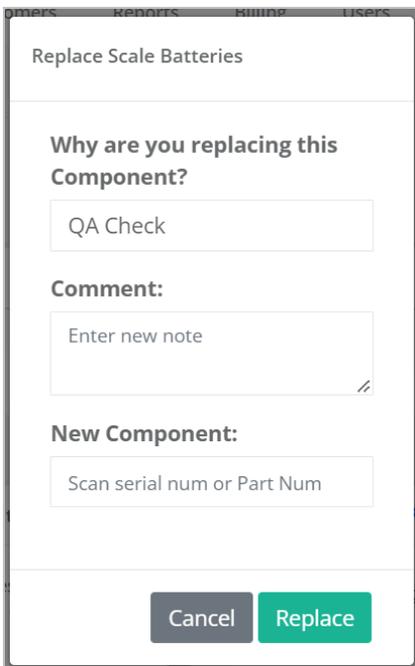
3. Click **Replace Component(s)**.



If there is more than one device in the kit, the Replace Components window opens, so you can choose which device to replace.



The Replace Components window appears.

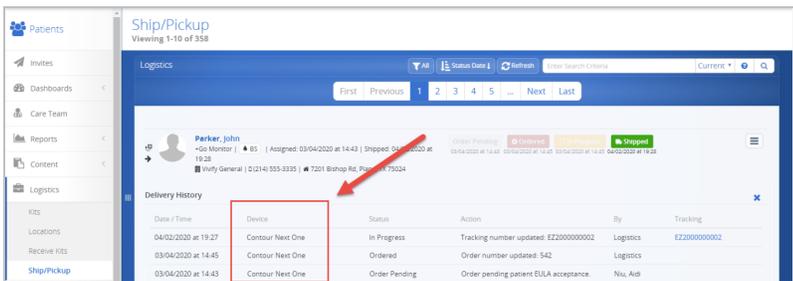


4. In the window, do the following:
  - a. In the **Why are you replacing this Component?** list, select **QA Check**, **Physical Damage**, or **Purchased**.
  - b. In the **Comment** box, type the reason for the replacement, such as the device is broken.
  - c. In the **New Component** box, scan or type the serial number of the new device.
5. Click **Replace**. The component is replaced and a confirmation message appears.
6. Click **OK**.

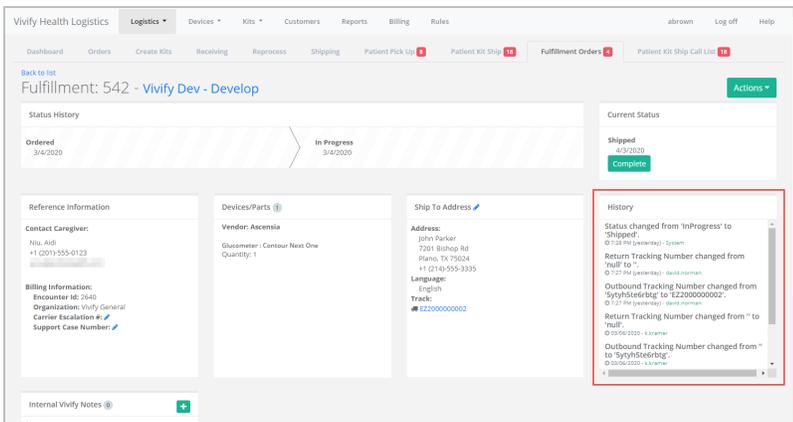
### 3.5.4 Viewing Replacement Device History

Device replacement delivery history is visible in the Care Team Portal on the Ship/Pickup page, so the team can follow the progress of the patient receiving their device. The statuses, actions, tracking numbers, dates, and other details sync from the Logistics Portal to the Care Team Portal.

**Example: Care Team Portal – Delivery History with Device Replacement Details and Tracking Number**



**Example: Logistics Portal Fulfillment Detail Page – History**



### 3.5.5 Viewing Internal Part Numbers

All parts and devices are assigned *internal part numbers* as a consistent and documented way to reference any component. Internal part numbers appear in several locations in the Logistics Portal so that users can correlate these numbers to the Master Parts List.

#### Locations

Internal part number locations include:

- On the Fulfillment Detail page of Kit Ship record types

The screenshot shows the Fulfillment Detail page for a Kit Ship record type. The page title is "Fulfillment: 23 - Kit: 100199 - jigsaw". The status history shows a sequence of steps: Ordered (10/28/2021), In Progress (10/28/2021), Shipped (10/28/2021), and Called (10/28/2021). The current status is "Complete" with the note "Vivify Trained" and the date "10/28/2021". The record information includes: Fulfillment Type: Kit Ship, Kit Pool: Default Kit Pool, Kit Type: Tablet Only, Kit Type Configuration: VIV001C1, Kit Id: 100199, Logistics Center: Vivify Development, BP Cuff Size: None, Scale Type: None, Contact Attempts: 0, and an "Update Contact Attempts" button. The devices section shows a "Tablet: Verizon Tab 4 (10.1 in)" with Serial Num: 277102631775043 and Internal Part Number: SMT537VYKA (highlighted in red). The SIM section shows "SIM: VZ Consumer SIM" with Serial Num: 8011966107748514948 and Internal Part Number: 5004 (highlighted in red). The ship to address is for Julian Pennington at 507 Exchange St., Portland, ME 04103, with phone number +1 (214)-807-2009. The language is English and the track is USPS - 12313. The kit ship date is 11/2/2021, Morning (AM), and the next scheduled call is not specified.

- On the Fulfillment Detail page of Kit Component Replacement record types

The screenshot shows the Fulfillment Detail page for a Kit Component Replacement record type. The page title is "Fulfillment: 93 - Kit: 100051 - jigsaw". The current status is "In Progress" with the date "2/4/2022". The record information includes: Fulfillment Type: Kit Component Replacement, Kit Pool: Default Kit Pool, Kit Type: Tablet Only, Kit Id: 100051, Logistics Location: Vivify Development, Replacement Reason: (blank), Contact Attempts: 0, and an "Update Contact Attempts" button. The replacement components section shows a "SIM" with "Old: VZ Consumer SIM - 5004 87103756866389805760" (highlighted in red with a red arrow pointing to it). The ship to address is for Frank Mazzini at 7201 Bishop Rd., Plano, TX 75024, with phone number +1 (469) 555-0000. The language is English. The scheduled date is "None" and the pick up date is "None". There are "Schedule" and "Picked Up" buttons.

- On the Parts page (found under the **Devices** menu option)

Dashboard POs Devices **Parts** Receive Devices

-- Choose -- Filter by... Go! Actions

203 Parts

Id	Part Number	Internal Part Number	Part Type	Is Consumable	Name	Purchase Order	Owner	Location	Condition	Kit
184	AAA Batteries	00169	Batteries	True	AAA Batteries			Vivify Development	New	100032
200	350091030	00267	Box Handle	False	Handle			Vivify Development	QA Check	100028
176	350091030	00267	Box Handle	False	Handle	1017		Vivify Development	New	100201
163	350098030	00267	Box Handle	False	Handle (Black)			Indianapolis Logistics Center	New	100197
202	UA-280	UA-280	BP Cuff	False	BP Cuff Medium (fits UA-767) SIZE 9.4"-14.2" OUT OF STOCK			Vivify Development	New	100015
198	UA-291B	00222	BP Cuff	False	BP Cuff Large (fits UA-651) SIZE 12.2"-17.7" (Bulk Packaging) OUT OF STOCK			Vivify Logistics Center	New	100017
197	UA-280	UA-280	BP Cuff	False	BP Cuff Medium (fits UA-767) SIZE 9.4"-14.2" OUT OF STOCK			Vivify Development	New	100028
196	UA-279	UA-279	BP Cuff	False	BP Cuff Small (fits UA-767-S) SIZE 6.3"-9.4"			Vivify Logistics Center	New	100159

- On the Devices list page (found under the **Devices** menu option)

Dashboard POs **Devices** Parts Receive Devices

Tablet Go! Actions

202 Tablets

Serial Num	Model	IMEI	Part Number	Internal Part Number	Owner	Location	Condition	Kit	Created
532523	Verizon Tab 4 (10.1 in)	358638035994271	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Logistics Center	QA Check		03/29/2022
277102631715043	Verizon Tab 4 (10.1 in)	277102631715043	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	New	100018	02/03/2022
277102631775043	Verizon Tab 4 (10.1 in)	277102631775043	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	Used	100199	10/06/2021
818926872193751	Verizon Tab 4 (10.1 in)	818926872193751	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	New	100198	10/06/2021
068308463468538	Verizon Tab 4 (10.1 in)	068308463468538	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Logistics Center	QA Check		10/06/2021
652030391503735	Verizon Tab 4 (10.1 in)	652030391503735	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	Used	100196	10/06/2021
530183897025953	Verizon Tab 4 (10.1 in)	530183897025953	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Logistics Center	New	100172	10/06/2021
400603769637684	Verizon Tab 4 (10.1 in)	400603769637684	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	QA Check	100194	10/06/2021
520678129156307	Verizon Tab 4 (10.1 in)	520678129156307	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	Used	100193	10/06/2021
111640941638825	Verizon Tab 4 (10.1 in)	111640941638825	SMT537YYKA	SMT537YYKA	jigsaw	Vivify Development	Used	100192	10/06/2021

- On the Device Details page (found under the **Devices** menu option)

Dashboard POs **Devices** Parts Receive Devices

Back to list Edit

Tablet Details

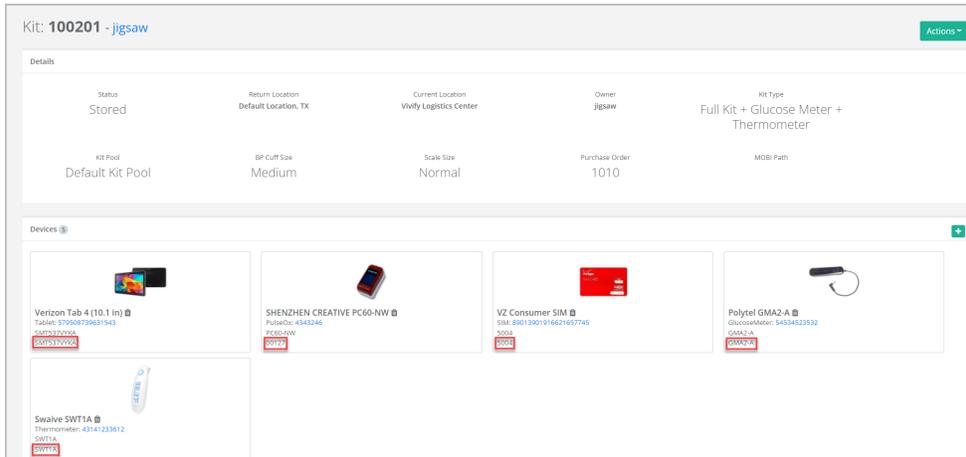
Serial Number: 277102631715043  
 Model: Verizon Tab 4 (10.1 in)  
 Part Number: SMT537YYKA  
 Internal Part Number: SMT537YYKA  
 IMEI: 277102631715043  
 Kit: 100018

Inventory  
 Owner: jigsaw  
 Location: Vivify Development  
 Condition: New  
 Purchase Order: 1011

Notes:  
 + History  
 03/28/2022 Added to kit 100018 c.choang  
 03/28/2022 Removed from kit 100012 c.choang  
 02/03/2022 Added to kit 100012 f.stadler  
 02/03/2022 Created f.stadler



- On the Kit Details page (found under the **Kits** menu option)



### APIs Using Internal Part Numbers

Many APIs now use internal part numbers instead of Logistics Portal part numbers to transfer component-related data.

These APIs include:

- Device Linking
- Ship Confirmation
- Device Receipt
- Device Status
- Fulfillment Request (Component Replacement)
- Fulfillment Request (Device Order)
- Pickup Order Alert
- Kit Details

### 3.5.6 Viewing Tracking Numbers

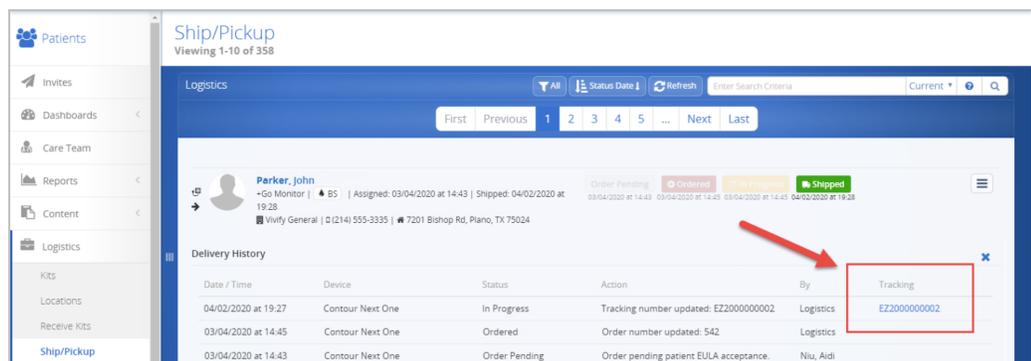
Outbound and return tracking numbers are visible for device fulfillment orders, kit device replacement orders, and kit ship/pickup. Any updates to the tracking numbers in the Logistics Portal will update the tracking numbers in the Care Team Portal.

This topic includes the following:

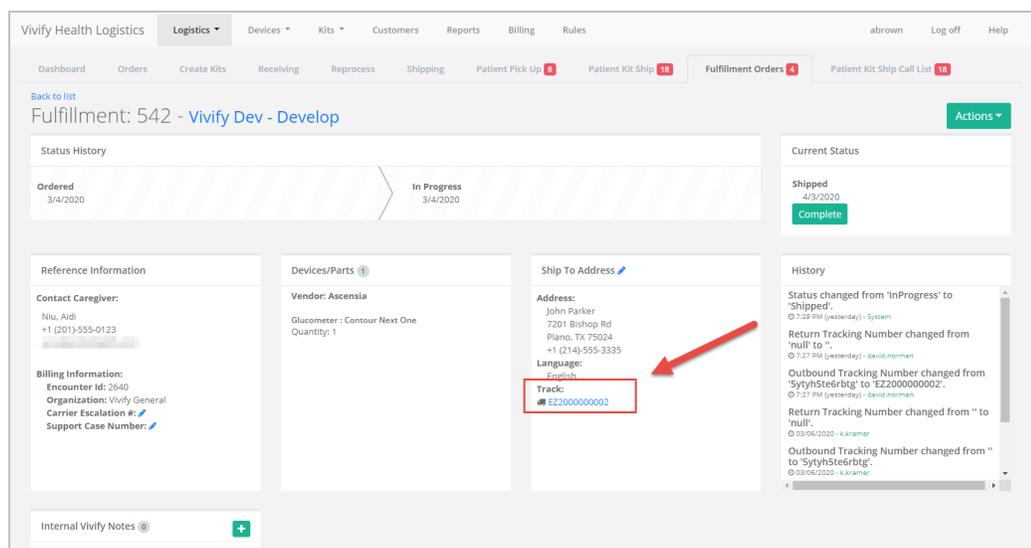
## Device Fulfillment Tracking Numbers – EasyPost Microservice

Outbound and return tracking numbers are visible for device fulfillment orders for each device in the record. Tracking numbers are linked to the FedEx tracking number.

### Example: Device Replacement Tracking Numbers in Care Team Portal



### Example: Device Replacement Tracking Numbers in Logistics Portal



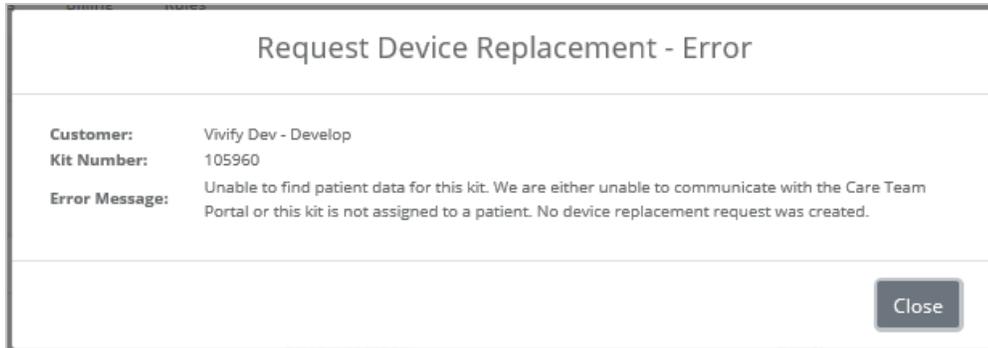
## Kit Device Replacement Tracking Numbers – EasyPost Microservice

The EasyPost microservice updates kit device replacement records based on outbound and inbound tracking numbers. Kit device replacement records are updated as follows:

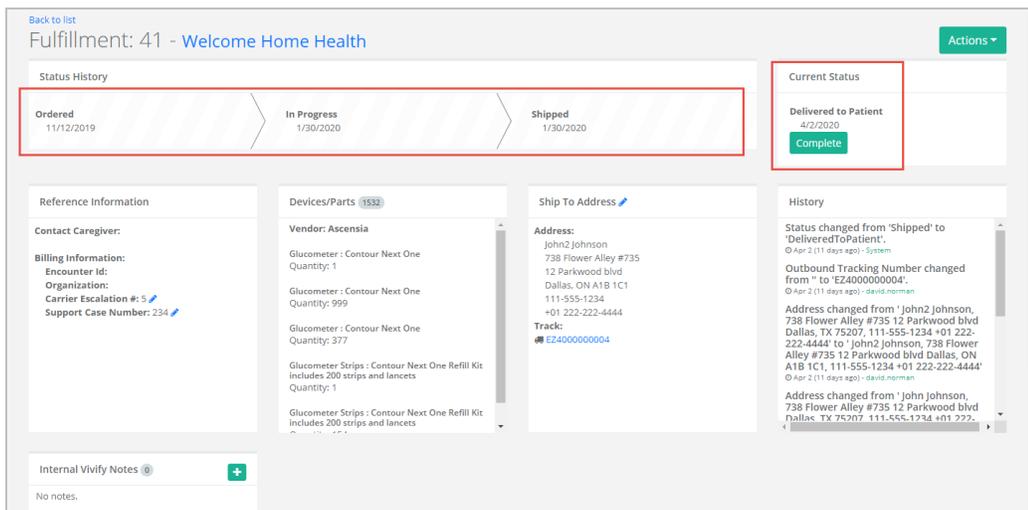
If we received EasyPost status	Records are updated to
Delivered (outbound tracking number)	Delivered to Patient (Fulfillment Record)

If we received EasyPost status	Records are updated to
In Transit	Picked Up (Fulfillment Record)
Delivered (return tracking number)	Delivered to Logistics (Fulfillment Record)

Kit device replacement records are not created if the system can't find patient data from the Care Team Portal. If a user attempts to replace a device that is not assigned to a patient, or the Logistics Portal cannot communicate with the Care Team Portal, the system displays an error message.



#### Example: Fulfillment Order Detail Page with Status History



### Kit Ship/Pickup Tracking Numbers – EasyPost Microservice

Kit ships and pickups were updated to use the EasyPost microservice. When a kit is marked as Shipped, a tracker is created for the outbound tracking. When the pickup record is created, a tracker is created for the return tracking number. The EasyPost microservice will monitor the tracking number status and update the record in the Logistics Portal when a tracking update is received. Kit ship and pickup records are updated as follows:

If we received EasyPost status	Records are updated to
Delivered (outbound tracking number)	Delivered to Patient (Kit Ship Record)
In Transit	Picked Up (Kit Pickup Record)
Delivered (inbound tracking number)	Delivered to Logistics (Kit Pickup Record)

Example: Kit Pickup Detail Page with Status History

### 3.5.7 Kit Device Replacement Messaging

Kit device replacement records include the ability to send messages between the portals. The Operations team and the Care Team Portal team can send messages related to records and status of replacement. When a message is sent from the Care Team Portal to the Logistics Portal, the unread message counts on the Fulfillment table and on the Fulfillment tab are incremented.

**Example: Kit Device Replacement Messaging on Ship/Pickup Page in Care Team Portal**

**Ship/Pickup**  
Viewing 1-10 of 17

**Pewter, Stanley**  
Kit: +Home | Assigned: 02/06/2020 at 10:40  
Vivify General | (972) 555-9748 | 1566 Logistics Lane, Plano, TX 75204

Delivered to Logistics  
04/02/2020 at 13:53

**Delivery History**

Date / Time	Device	Status	Action	By	Tracking
04/02/2020 at 13:54	AnD UA-767PBT-CI BP Small	Delivered to Logistics	Tracking number updated: EZ4000000004	Logistics	EZ4000000004
04/02/2020 at 13:53	AnD UA-767PBT-CI BP Small	Delivered to Logistics		Logistics	
04/02/2020 at 13:52	AnD UA-767PBT-CI BP Small	Shipped	Tracking number updated: 123	Logistics	123
04/02/2020 at 13:42	AnD UA-767PBT-CI BP Small	Shipped	Tracking number updated: 123	Logistics	123
04/02/2020 at 13:41	AnD UA-767PBT-CI BP Small	In Progress		Logistics	
04/02/2020 at 13:38	AnD UA-767PBT-CI BP Small	Ordered		Logistics	
04/02/2020 at 13:38			Shipping information added: 1566 Logistics Lane, Plano TX 75204, 19725559748	Logistics	

**Messages**

Date / Time	Message	By	Acknowledge / Send Message
04/02/2020 at 14:06	When is this shipment expected to arrive?	Hoi, IT	
04/02/2020 at 15:00	Tomorrow.	Logistics	

**Example: Kit Device Replacement Messaging on Fulfillment Detail Page in Logistics Portal**

**Fulfillment: 661 - Kit: 103857 - Vivify Dev - Develop**

**Status History**  
Ordered 4/2/2020 → In Progress 4/2/2020 → Shipped 4/2/2020

**Current Status**  
Delivered to Logistics 4/2/2020

**Status**  
Delivered to Logistics  
2 Days  
Contact Attempts: 0  
Update Contact Attempts  
Agent: Assign Agent

**Replacement Devices**  
BloodPressure  
New: AnD UA-767PBT-CI BP Small (\$160800328)

**Ship To Address**  
Address: Stanley Pewter, 1566 Logistics Lane, Plano, TX 75204, +9 (725)-559-748  
Language: English  
Track: EZ4000000004, EZ4000000004

**Pick Up Date**  
Scheduled Date: None  
Schedule  
Pick Up Date: None  
Picked Up

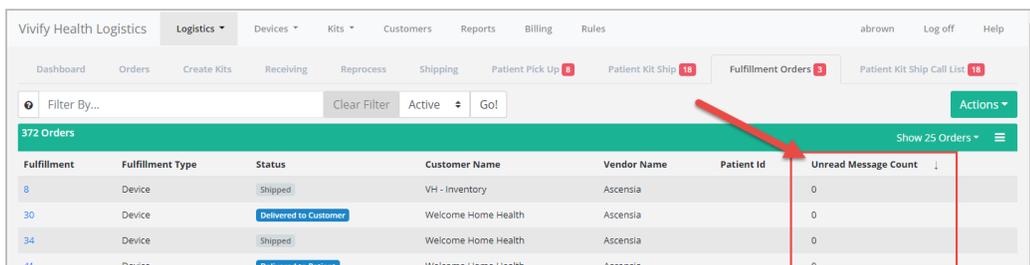
**Reference Information**  
Contact Caregiver: Cook, Hoi, +1 (201)-555-0123  
Billing Information: Encounter Id: 4610, Organization: Vivify General, Carrier Escalation #, Support Case Number

**Internal Vivify Notes**  
No notes.

**History**  
Outbound Tracking Number changed from '123' to 'EZ4000000004'.  
Status changed from 'Shipped' to 'DeliveredToLogistics'.  
Return Tracking Number changed from '123' to 'EZ4000000004'.  
Return Tracking Number changed from '' to '123'.

**Messages to Care Team**  
Tomorrow.  
When is this shipment expected to arrive?  
Mark As Read

### Example: Unread Message Count (Fulfillment Records)



### 3.5.8 Mass Assigning Agents to Records

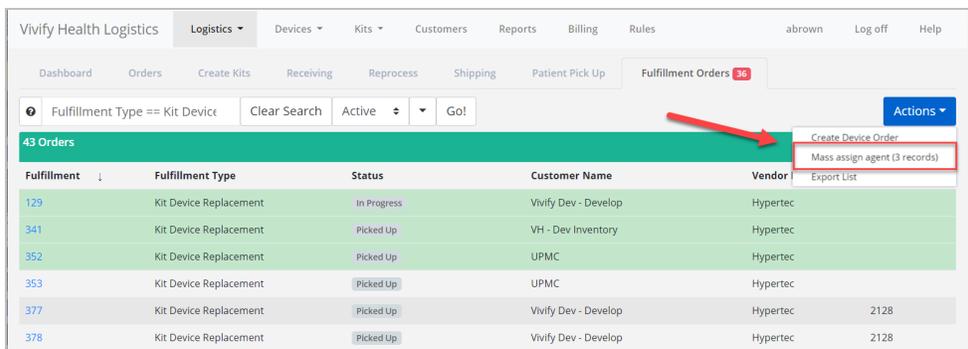
Fulfillment records can be mass assigned to agents so agents can be assigned to multiple records quickly.

To mass assign agents:

1. In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab.

The Fulfillment Orders page appears.

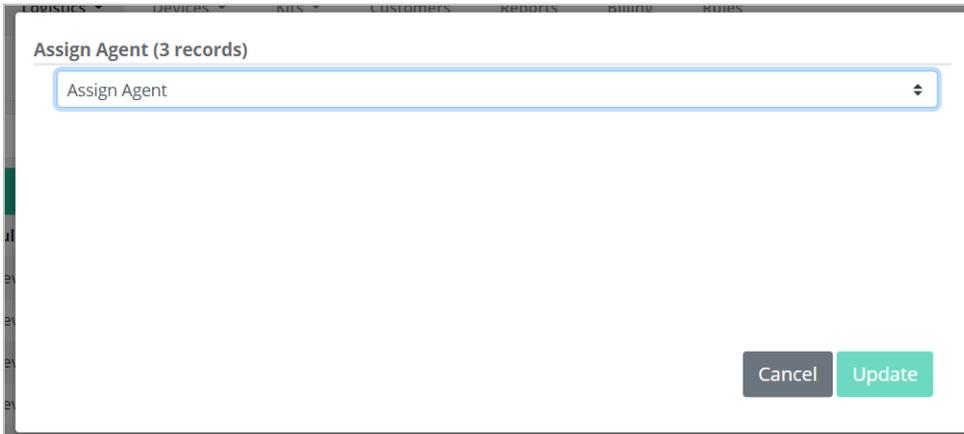
2. Click to highlight the rows of the records you want to assign to an agent. You can select and assign an agent to both Kit Ship and Kit Component Replacement records at the same time.
3. In the **Actions** menu, click **mass assign agents (x records)**. (In place of the x will be the number of records selected in the Fulfillment List table.) In the Assign Agent window, a list of agents appears.



The Assign Agent window appears.

4. In the list, click the agent you want to assign to the records.

5. Click **Update**.



If you receive a fulfillment validation error after clicking **Update**, the error will include the name of the relevant fulfillment type for reference.

### 3.5.9 Exporting the Fulfillment Orders List

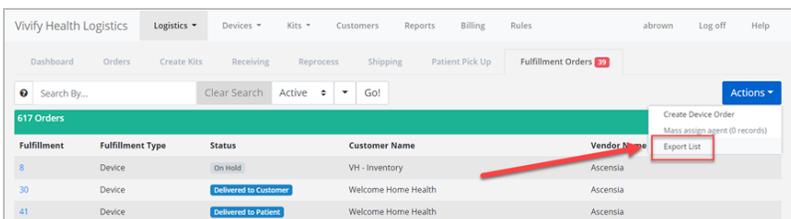
On the Fulfillment Orders List page, in the Actions menu, an Export List option is available. The user role Reports is required for this export feature.

To export the fulfillment orders list:

1. In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab.

The Fulfillment Orders page appears.

2. Apply filters and select the columns to display or use the default settings.
3. In the **Actions** menu, click **Export List**. Selecting this option generates an Excel spreadsheet with the data currently selected on the screen. The selected columns are included and columns not selected are not included. If there is a filter applied, the export honors the filter.



The spreadsheet is downloaded to your computer.

## 3.6 Managing Device Orders

---

The Fulfillment Order page tracks the fulfillment of device orders. Orders created on this page are sent to the manufacturer through our system and a tracking number is provided (currently Ascensia and Hypertec are supported). The section describes processes for creating, editing, and deleting device orders and messaging the care team.

In this section:

- Creating a Device Order (see "Creating a Device Order," page 75).
- Editing a Device Order (see "Editing a Device Order," page 79).
- Deleting a Device Order (see "Deleting a Device Order," page 80).
- Mass Assigning Agents to Records (see "Mass Assigning Agents to Records," page 73).
- Viewing Tracking Numbers (see "Viewing Tracking Numbers," page 68).
- Viewing Replacement Device History (see "Viewing Replacement Device History," page 65).
- Exporting the Fulfillment Orders List (see "Exporting the Fulfillment Orders List," page 74).

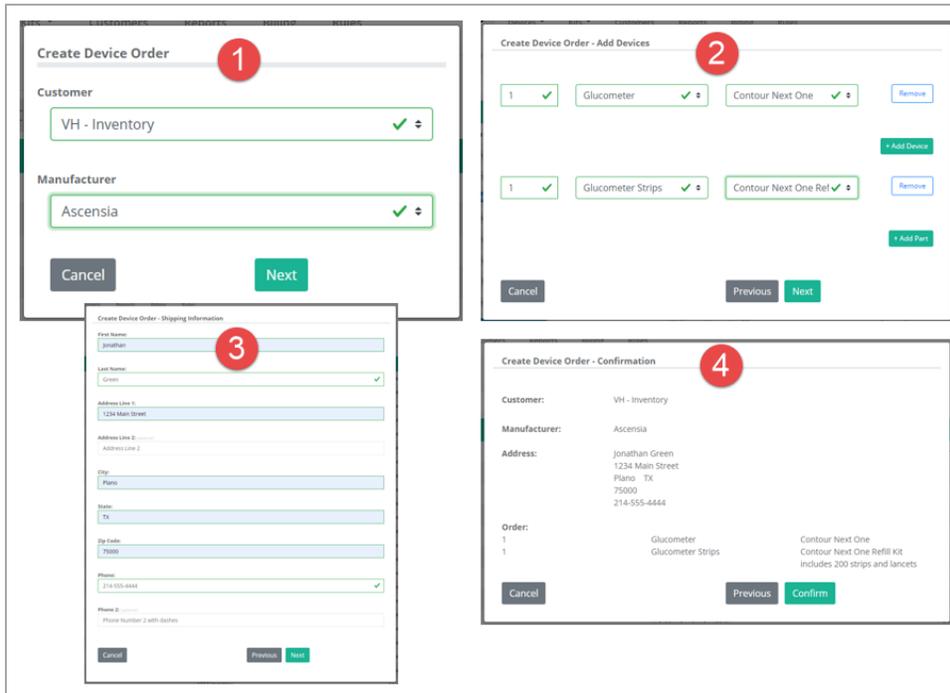
### 3.6.1 Creating a Device Order

---

As the order is processed, our system will receive notifications from the manufacturer that will be visible on the Fulfillment Order Detail page. Creating a device order is a four-step process. Each step in the process must be completed before you can move to the next step.

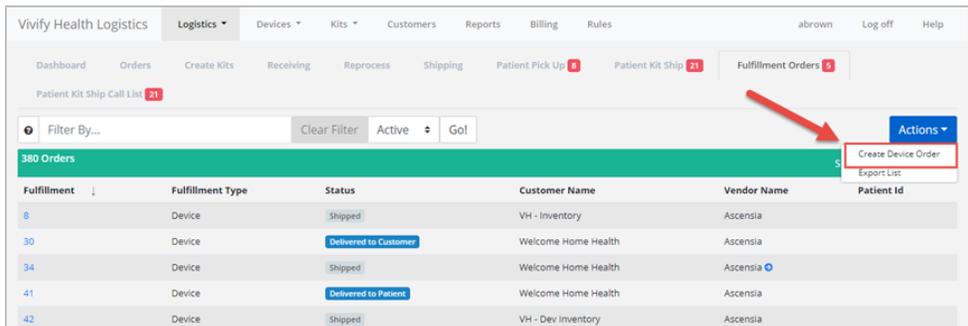
- Step 1: Identify the customer and manufacturer.
- Step 2: Specify device/parts quantity, device type, and device model.
- Step 3: Designate shipping information (first name, last name, address, city, state, zip code, phone 1, and phone 2).

- Step 4: Confirmation.



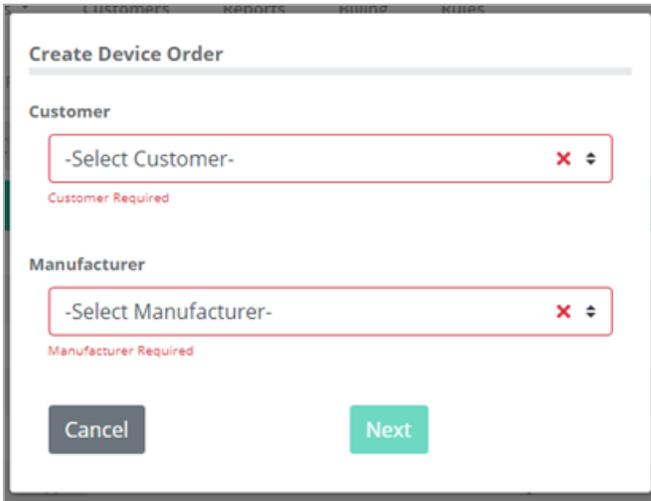
To replace a device in a kit on the Fulfillment Orders page:

1. In the menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Order list page, click the **Actions** menu, and then click **Create Device Order**.



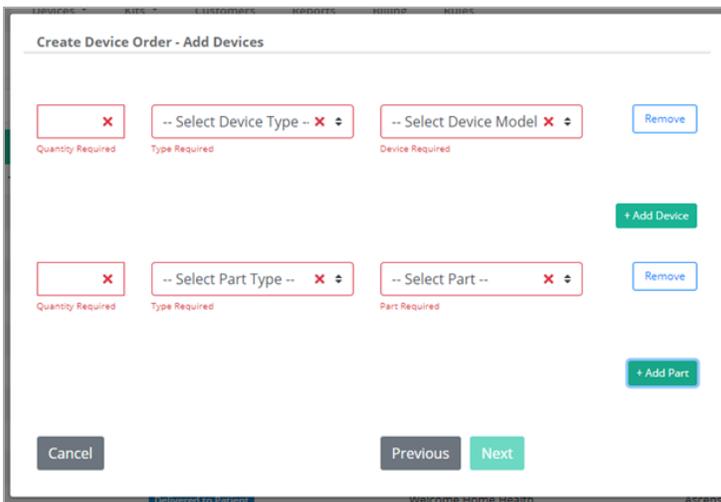
The Create Device Order window appears.

3. In the Create Device Order window, select an option for the **Customer** and **Manufacturer**, and then click **Next**.



The Create Device Order - Add Devices window appears.

4. In the Create Device Order - Add Devices window, do the following, and then click **Next**:
- For devices, click **Add Device**, and then select a value for quantity, device type, and device model.
  - For parts, click **Add Part**, and then select a value for quantity, part type, and part.
  - If you have more than one device or part to order, you can click the **Add Part** and **Add Device** buttons again to add multiple parts and devices.



The Create Device Order - Shipping Information window appears.

- In the Create Device Order - Shipping Information window, type shipping information for where the devices and/or parts will be delivered.

**Create Device Order - Shipping Information**

**First Name:**  
First Name x  
First Name Required

**Last Name:**  
Last Name x  
Last Name Required

**Address Line 1:**  
Address Line 1 x  
Address 1 Required

**Address Line 2:** (optional)  
Address Line 2

**City:**  
City x  
City Required

**State:**  
State x  
State/Province Abbreviation Required

**Zip Code:**  
Zip Code x  
Zip Code Required

The Create Device Order - Confirmation window appears.

- Review the order details and then click **Confirm**.

**Create Device Order - Confirmation**

**Customer:** VH - Dev Inventory

**Manufacturer:** Hypertec

**Address:** Jonathan Jones  
1234 Main Street  
Plano TX  
75000  
214-555-4444

**Order:**

1	BloodPressure	Welch Allyn 1500
1	BP Cuff	BP Cuff Small (fits UA-767-S) SIZE 6.3"-9.4"

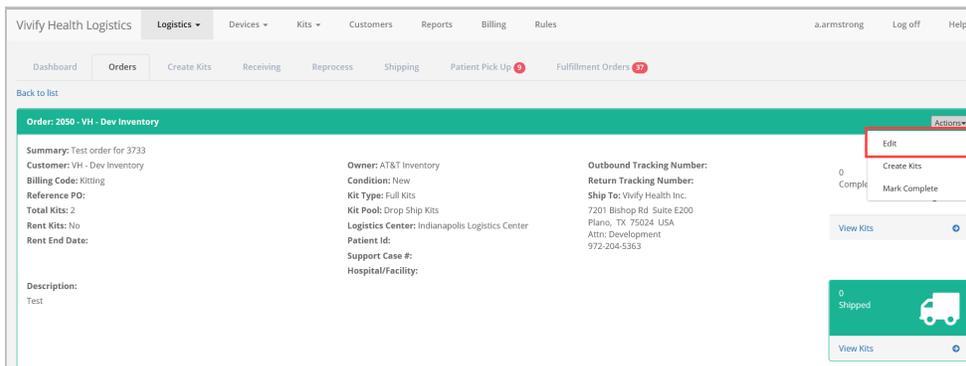
**Cancel** **Previous** **Confirm**

The order is visible on the Fulfillment Order list page with the status set to Ordered.

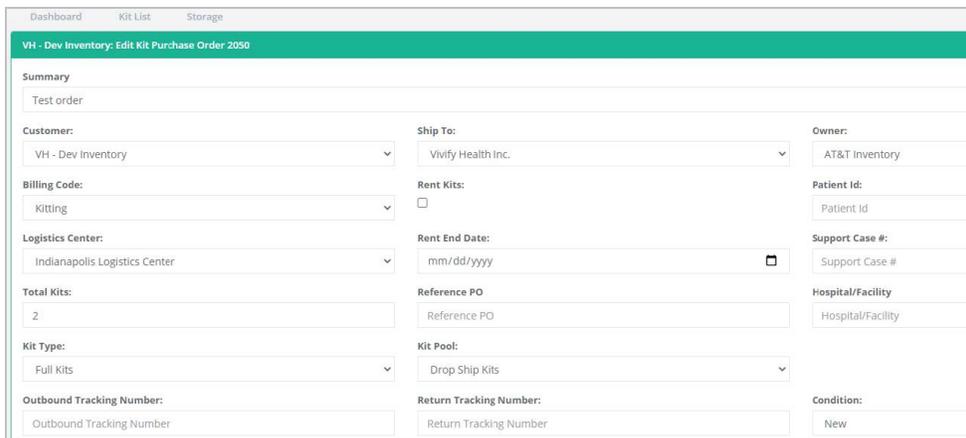
### 3.6.2 Editing a Device Order

Logistics users with the appropriate permissions can edit all order fields. If the **Customer** is changed, the **Ship To** location reloads the new data from the correct customer. When editing, the existing devices and parts are visible, and you can add more, if needed. You can remove the added devices before the order is saved, but once it is saved, you cannot remove them. You can zero out the quantity if you need to remove a device or part that was already saved. Changes to the order will only effect new kits, not any kits already created.

1. In the menu, click **Logistics > Fulfillment Orders**.
2. On the Fulfillment Order list page, click the **Actions** menu, and then click **Edit**.



The order will open and you can edit the fields as needed.



- If the order has existing devices, you can also edit the devices as needed.

### 3.6.3 Deleting a Device Order

Logistics users with the appropriate permissions can delete invalid orders from the Logistics Portal. If kits are created, you can no longer delete an order. The Restore PO button removes the date and opens the order again.

Filters are available to show all completed and deleted orders.

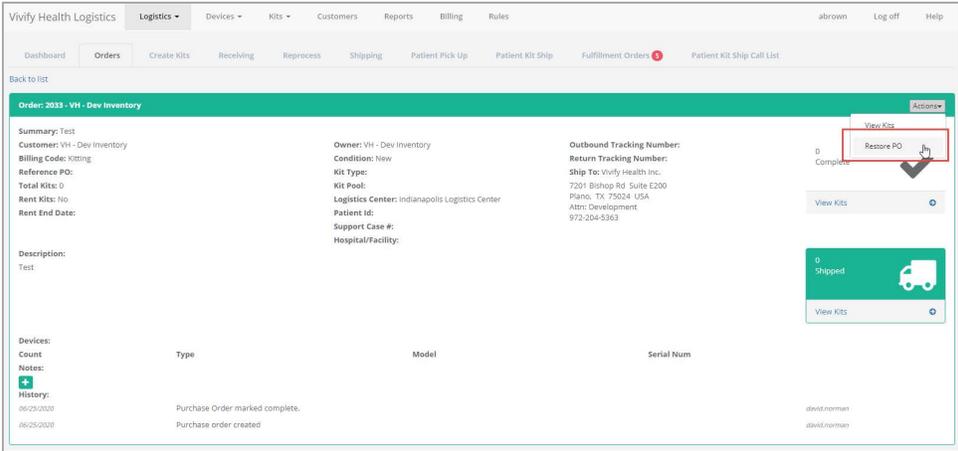
To delete an order on the Fulfillment Orders page:

- In the menu, click **Logistics > Fulfillment Orders**.
- On the Fulfillment Order list page, click the **Actions** menu, and then click **Delete Order**.

- On the Orders List Page, you can view the Completed Date and Completed By columns.

Order #	Total Kits	Customer	Summary	Created Date	Logistics Location	Created By	Completed Date	Completed By	Deleted By	Deleted Date
2106	20	Vivify Dev - Develop	Dipti- Test PO for Kits	1:30 PM (27 minutes ago)	Vivify Development	d.gupta				
2105	20	Vivify Dev - Develop	Test	1:28 PM (29 minutes ago)	Vivify Development	d.gupta			d.gupta	1:30 PM (27 minutes ago)

4. To restore the PO, on the Fulfillment Order list page, click the **Actions** menu, and then click **Restore PO**.



# Picking Up Kits

## 4.1 Introduction

---

After a patient has completed their program or has decided to no longer participate, the Agent starts the process of picking up kit. The Agent updates the pickup record in the Logistics Portal to track contact attempts and the pickup schedule.

This chapter includes the following:

- Viewing a Pickup Record(see "Viewing a Pickup Record," page 82).
- Scheduling a Pickup(see "Scheduling a Pickup," page 84).
- Updating Contact Attempts(see "Updating Contact Attempts," page 86).
- Customer Pickup(see "Customer Pickup," page 88).

## 4.2 Viewing a Pickup Record

---

The Kit Pickup fulfillment type is available on the Fulfillment Orders page in the Logistics Portal. When a pickup order is received from the Care Team Portal, the order is saved to the Fulfillment Orders page.

Note: The previous Patient Kit Pickup page was removed from the Logistics menu as this data is now on the Fulfillment Orders List page.

The Fulfillment Orders List page has a filter for Kit Pickup fulfillment type and columns for Notes, Pickup Info Updated, Carrier Escalation #, Received Date, Preferred Pickup Date, Scheduled Pickup 1 to 4, Final Pickup Attempt, Pickup Date, and SLA.

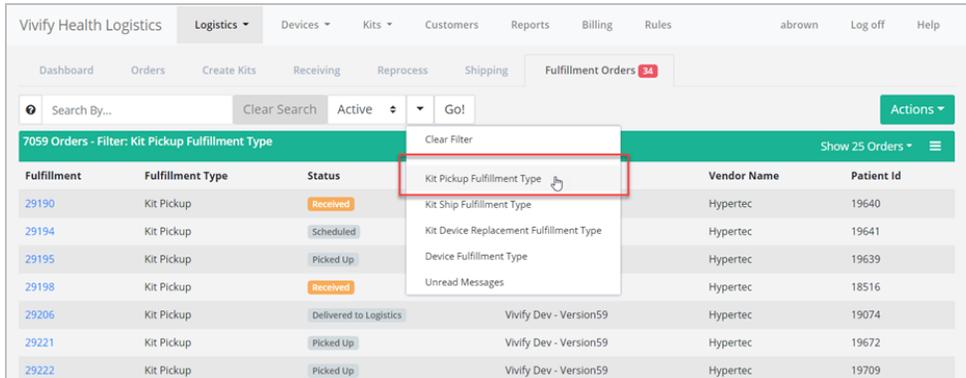
### 4.2.1 Viewing a Pickup Record on the Fulfillment Orders Page

---

1. In the menu, click **Logistics > Fulfillment Orders** or click the Fulfillment Orders tab.

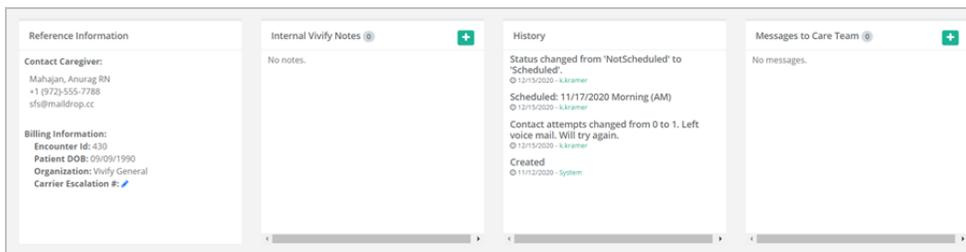
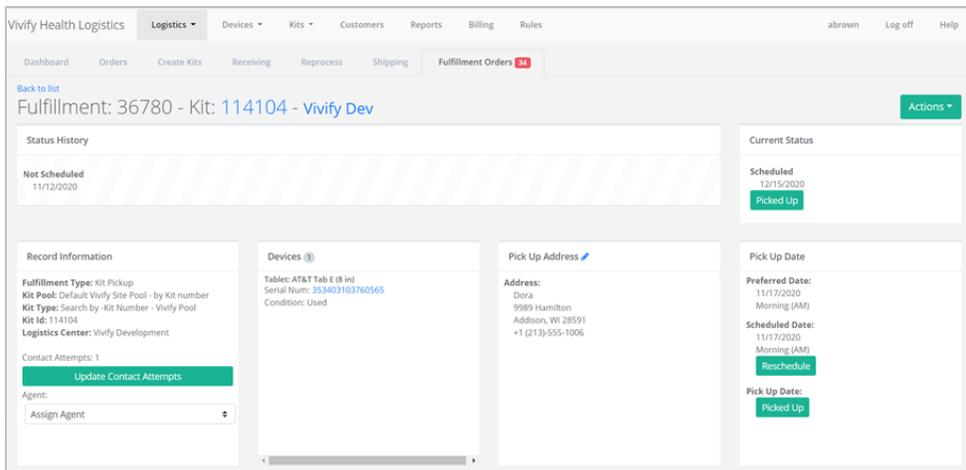
The Fulfillment Orders page appears.

- In the **Search By** box, type the record number, status, or other identifying information. For more information about search options and keywords, see Searching, Filtering, and Sorting on the Fulfillment Orders List page. You can also filter the list by Kit Pickup Fulfillment Type to only show those records in the list.



- In the **Fulfillment** column, click the number to open the Fulfillment Detail page.

The Fulfillment Details page appears.



- Depending on the current status of the record, you can Update Contact Attempts, Schedule a Pickup Date, or record a Picked Up date. You can also send messages to the Care Team regarding this record, if needed.

This page includes sections for the following information:

- **Status History and Current Status:** Status History shows the progress the order has completed through the various states, including the date of transition. Current Status shows the date the order entered into its current status and gives an option to process the order to the next step in the workflow. The following status types are supported: Ordered, In Progress, Shipped, Delivered to Patient, Delivered to Customer, Delivered to Logistics, Called, Scheduled, Picked Up, Received, Complete, Canceled, On Hold. Each status has a button that allows you to move the record to the next step in the process. When a record is placed in On Hold status, the Resume button can be used to move the record back to the previous status.
- **Devices:** Lists the type of device that has been requested to be replaced and includes the old and new model and serial number. Clicking the device serial number opens the Device details page where you can view the history of the device and other information. The Replacement Device section only appears in records with the Fulfillment Type of Kit and Kit Device Replacement.
- **Pick Up Address:** Lists the address, language, and tracking number for the order. Clicking the tracking number opens the FedEx site.
- **Pick Up Date:** Shows the retrieval dates of the old device and the Scheduled Date and Pick Up Date, with options to reschedule and mark as picked up (if the order has shipped).
- **Reference Information:** Includes Contact Caregiver and Billing Information (Encounter ID, Patient DOB, Organization, Carrier Escalation).
- **Internal Vivify Notes:** Comments or information about the order.
- **History:** History information related to the current fulfillment record, including status changes, pick up dates and times, and any changes made to the order information.
- **Messages to Care Team:** Allows the Logistics User to send messages to the Care Team regarding the order. The messages are visible in the Care Team Portal on the Ship/Pickup page.

### 4.3 Scheduling a Pickup

---

As a Kit Pickup Agent, do the following:

1. Click **Logistics > Fulfillment Orders** and then filter the list by **Kit Pickup Fulfillment Type**.

A list of kit pickup records appears.

Fulfillment	Fulfillment Type	Status	Vendor Name	Patient Id
29190	Kit Pickup	Received	Hypertec	19640
29194	Kit Pickup	Scheduled	Hypertec	19641
29195	Kit Pickup	Picked Up	Hypertec	19639
29198	Kit Pickup	Received	Hypertec	18516
29206	Kit Pickup	Delivered to Logistics	Vivify Dev - Version59	19074
29221	Kit Pickup	Picked Up	Vivify Dev - Version59	19672
29222	Kit Pickup	Picked Up	Vivify Dev - Version59	19709

2. In the **Fulfillment** column, click the Kit number to open the kit order for the patient.

After selecting the pickup you are working on, the following screen appears in the Not Scheduled status.

3. In the **Agent** list, select your name to assign the Pickup to yourself.

4. Contact the patient using the phone number provided in the **Pick Up Address** section.

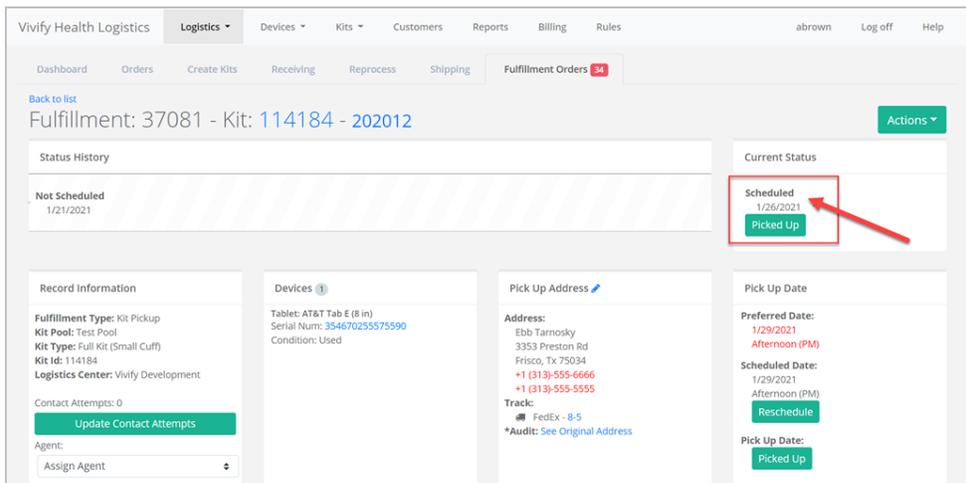
5. Educate the patient on the correct packing process and ensure the patient has all the devices and the power cord and adapter prior to packing up the kit. Verify the following:

- Verify that the patient can locate the kit box with the handle that was stored previously and verifies the shipping label on the back of the box.
- Verify with the patient all devices that were included in the kit. In the **Actions** menu, click **View Kit** on the Fulfillment Orders > Kit Pickup Details page to check which devices are part of this kit, and then help the patient gather all devices and parts to pack the kit up correctly. Kit pickup records have a list of devices currently included in the

kit. The list stays synced with the current devices. This allows the Pickup Agent to know what devices the patient is expected to have when they call the patient to walk them through packing up the kit.

- c. Verify that the kit is sealed (with included tape) before the patient gives the kit to FedEx.
6. In the **Pick Up Date** section, confirm the pickup **Preferred Date** with the patient. FedEx offers two windows per day with AM hours of 8:00 AM - 12:00 PM or PM hours of 1:00 PM - 5:00 PM. Let the patient know someone will need to be home when FedEx arrives. If the patient requests a different pickup date, that is ok. If the patient doesn't answer, leave a voicemail as follows:  
  
*“Hello (PATIENT). This is (AGENT) calling on behalf of (CUSTOMER) in regard to the retrieval of your health kit FedEx is scheduled to pick up the kit on (Preferred Date) and someone will need to be home when FedEx arrives., If you need assistance in packing up your health kit or we need to Reschedule this Pickup date, please feel free to call us at 877-907-4754. Thank you.”*
7. Schedule FedEx.
8. In the **Pick Up Date** section, click **Schedule** to add the scheduled pickup date. Enter an **Internal Note** in the pickup order with the FedEx confirmation number.

The record automatically changes to Scheduled status.



9. For next steps, see Failed Pickup Attempts or Successful Pickup Attempts .

## 4.4 Updating Contact Attempts

The Kit Pickup Agent can track their contact attempts on the Fulfillment Orders > Kit Pickup Details page.

As a Kit Pickup Agent, to update contact attempts, do the following:

1. Click **Logistics > Fulfillment Orders** and then filter the list by **Kit Pickup Fulfillment Type** or search by the record number.

A list of kit pickup records appears.

2. On the **Fulfillment Orders** list page, click a record number to open the Kit Pickup Details page.
3. After each patient call attempt, click **Update Contact Attempts** and select the appropriate call note.

Vivify Health Logistics

Logistics - Devices - Kits - Customers - Reports - Billing - Rules

abrown Log off Help

Dashboard Orders Create Kits Receiving Reprocess Shipping Fulfillment Orders 34

Back to list

Fulfillment: 36780 - Kit: 114104 - Vivify Dev

Actions

Status History

Not Scheduled 11/12/2020

Current Status

Scheduled 12/15/2020 Picked Up

Record Information

Fulfillment Type: Kit Pickup

Kit Pool: Default Vivify Site Pool - by Kit number

Kit Type: Search by -Kit Number - Vivify Pool

Kit Id: 114104

Logistics Center: Vivify Development

Contact Attempts: 1

Update Contact Attempts

Assign Agent

Devices 1

Tablet: AT&T Tab E (8 in)

Serial Num: 353403103760565

Condition: Used

Pick Up Address

Address:

Dora

9989 Hamilton

Addison, WI 28591

+1 (213)-555-1006

Pick Up Date

Preferred Date: 11/17/2020 Morning (AM)

Scheduled Date: 11/17/2020 Morning (AM) Reschedule

Pick Up Date: Picked Up

Back to list

Fulfillment: 36780 - Kit: 114104 - Vivify Dev

Actions

Status History

Not Scheduled

Left voice mail. Will try again.

Unable to leave message; voice mail not setup.

Spoke to patient who asked to be called back later.

Spoke to patient and kit has been shipped.

Spoke to patient and completed install.

Spoke to patient and scheduled appointment.

Care Team Escalation

Delivery Exception

Carrier Exception

No Note

Update Contact Attempts

Agent:

Assign Agent

Devices 1

Tablet: AT&T Tab E (8 in)

Serial Num: 353403103760565

Condition: Used

Pick Up Address

Address:

Dora

9989 Hamilton

Addison, WI 28591

+1 (213)-555-1006

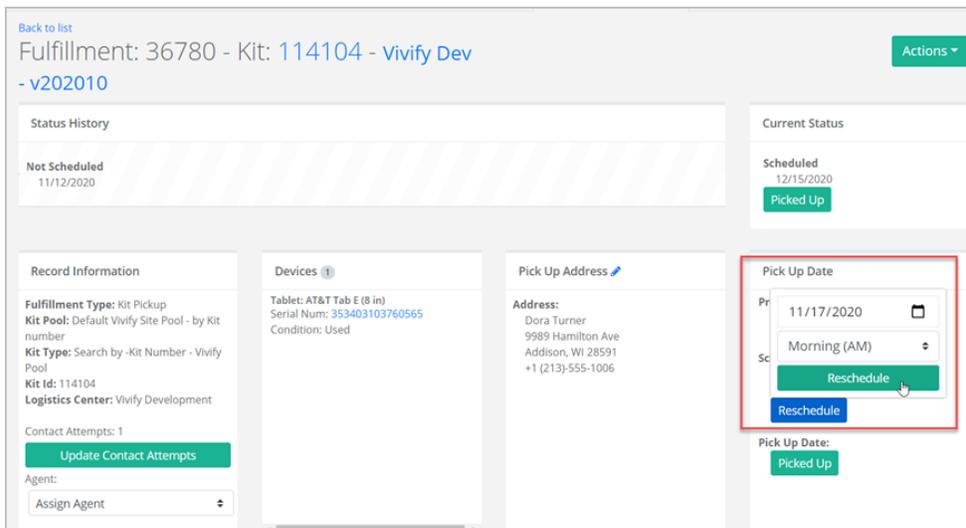
Pick Up Date

Preferred Date: 11/17/2020 Morning (AM)

Scheduled Date: 11/17/2020 Morning (AM) Reschedule

Pick Up Date: Picked Up

4. Click **Reschedule** to update the **Scheduled Date** and add the appropriate date and time.

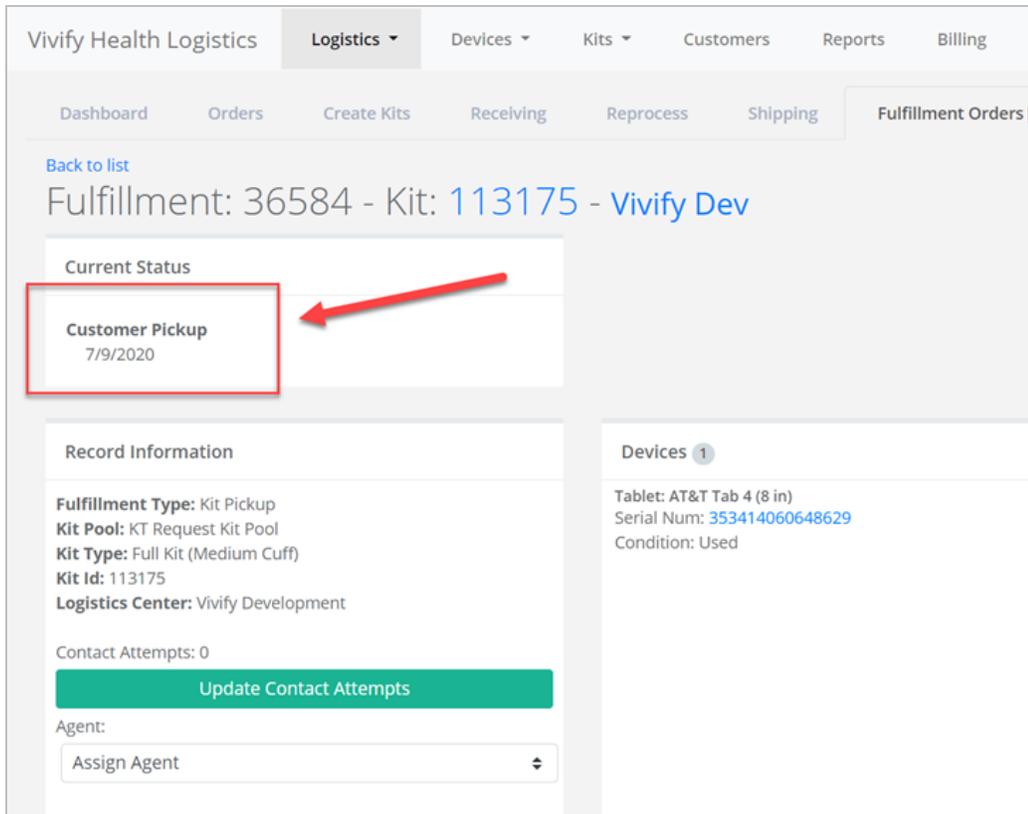


It is important to keep the Care Team members informed and this information syncs directly to the Care Team Portal.

5. Kit Pickup and Install Agents should review all kit pickup orders every day to determine if a kit has been picked up or if the patient needs to be called again to attempt another pickup. If FedEx couldn't pick up the kit on the Scheduled Date because the first pickup attempt was unsuccessful, call the patient back and reschedule FedEx for the next business day by repeating the steps in Scheduling the Pickup. If the kit was successfully picked up, proceed to Successful Pickup Attempts. If not, proceed to Failed Pickup Attempts.
6. Repeat the process until four pickup attempts have occurred. If at any point the kit was successfully picked up, proceed to Successful Pickup Attempts. If not, proceed to Failed Pickup Attempts .

## 4.5 Customer Pickup

When a kit is unassigned from a patient in the Care Team Portal, they have the Unassign Option for the Customer to retrieve the kit. In choosing this option, it will create a new Pickup Record in the Logistics Portal with the status of **Customer Pickup** to differentiate from a normal pickup.



There is no action the Agent needs to take on these Pickup Records until the fifth business day it has been open. On the fifth business day, if there is still no movement on the Return Tracking Number, the Agent uses **Messages to the Care Team** to send a message as follows:

*“Hello, Team. We see this kit was unassigned five business days ago that the Care Team will retrieve the kit; however, we see no movement on the return tracking number. May we offer any assistance in retrieving this kit from the patient to be returned to the reprocessing center? If you or the patient needs help, please feel free to call us at 877-907-4754. Thank you.”*

If the Customer has messaging disabled, do the following:

1. Call the Care Team member listed in **Contact Caregiver**, in the **Reference Information** section, to inform them we do not see any movement on the return tracking number and we are inquiring if they need assistance in retrieving this kit to be returned to the reprocessing center. If the Care Team member does not answer, leave a voicemail with the above information.
2. Leave a note in the **Internal Vivify Notes** with which Care Team Member you contacted and whether you were able to speak to them or leave a voicemail.

## Reprocessing Kits

### 5.1 Introduction

---

After a kit is used by a patient, they return the kit so it can be used again. When the kit arrives at the facility, it must be reprocessed. You can use this document to follow the reprocessing procedures. During this process, use this reprocessing checklist to make sure you complete all the required tasks and inventory all the items in the returned kit.

This chapter includes the following:

- Reprocessing Kits (see "Reprocessing Kits," page 90).
- Kit Reprocessing Checklist (see "Kit Reprocessing Checklist," page 94).
- Replacing a Device (RMA) (see "Replacing a Device (RMA)," page 98).

### 5.2 Reprocessing Kits

---

#### 5.2.1 Receiving the Kit

---

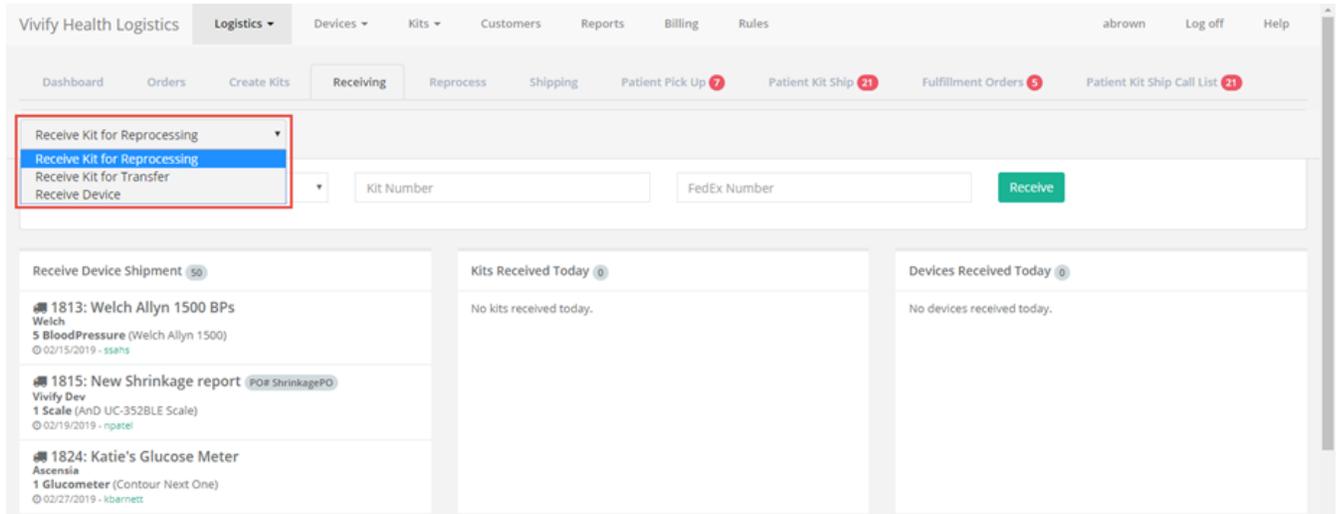
1. Upon receiving a kit to be recycled, bring the kit into the containment area, and then inspect the kit box to make sure there is no obvious damage, which may indicate damage to the components inside the box.

Note: If the kit box is damaged, make sure the FedEx/other shipping person is present while you visually inspect the contents for damage.

2. In the Logistics Portal, click **Logistics**, and then click **Receiving**.

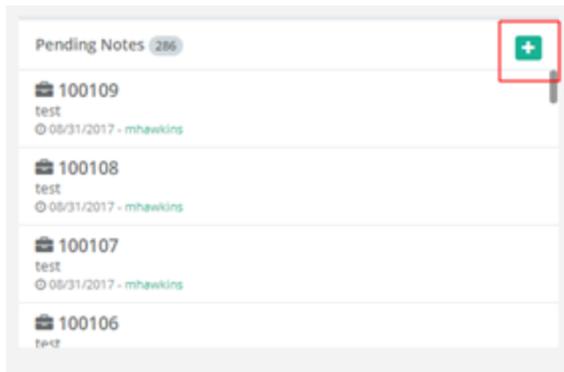
The Receive Kits page appears.

3. In the list, click **Receive Kits for Reprocessing**.



4. In the **Select Logistics Location** list, click the receiving location.

In the Pending Notes area, you can click the plus sign to add a note. Pending notes are used to add information about the receiving kit, such as if a kit is missing devices or is contaminated.

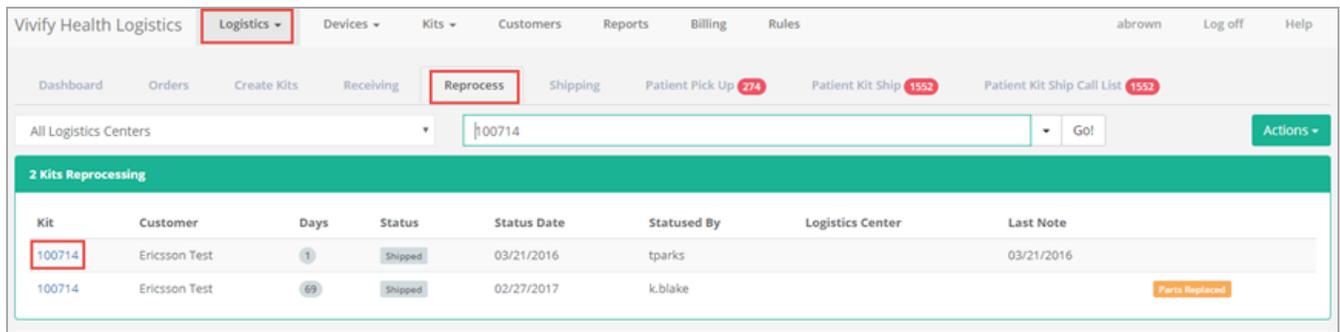


5. Scan in the kit number and the tracking number. The information will then appear in the appropriate fields.
6. The Receive button is selected automatically after scanning the tracking number.



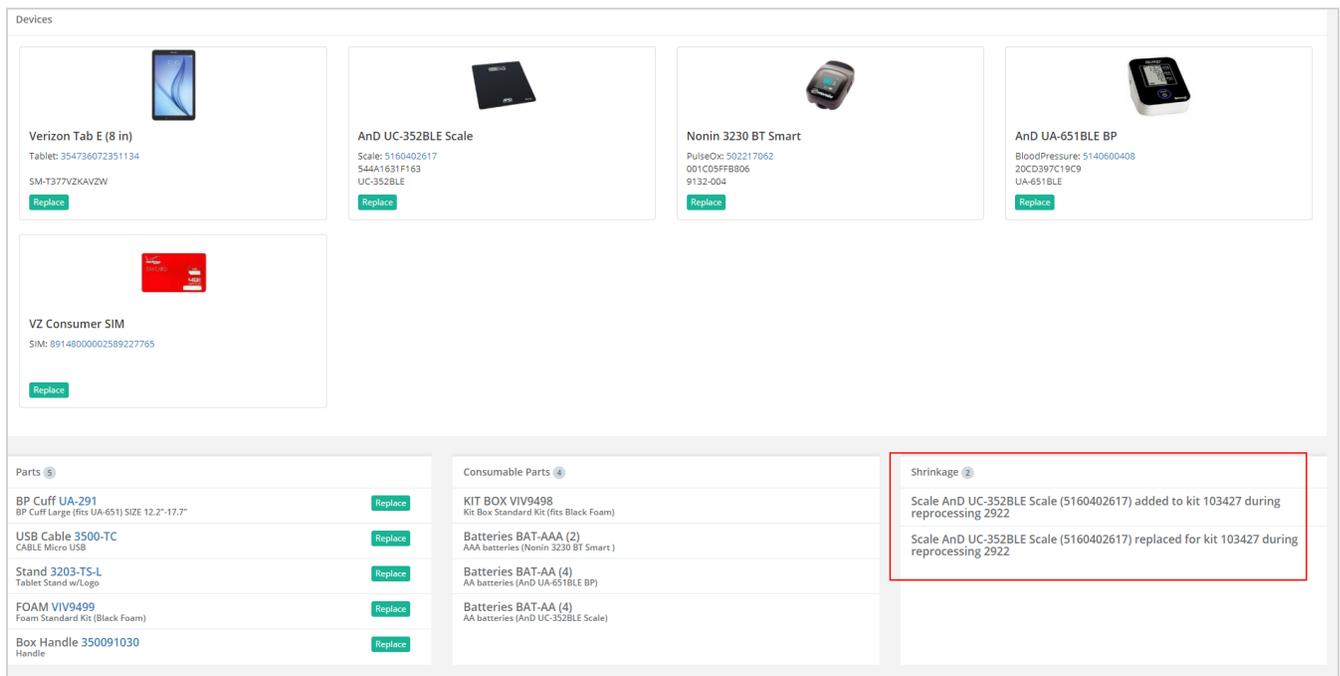
The Kits Received Today section is populated.

7. Click the kit number link from the list. (You can also click the kit number from Logistics > Reprocess.)



The Reprocess page appears.

The **Shrinkage Note** on the reprocessing record includes the condition (reason for replacing) for devices, so the reason is easily visible without running the Shrinkage report.



8. In the **Actions** menu, click any of the following:

- *Print Checklist* – Opens a printable version of the checklist. This action does not move the kit into a different status.
- *In Progress* – Use this status while you are processing the kit. After the kit is moved to In Progress status, the next step is to [complete the reprocessing checklist](#). The reprocessing checklist walks you through the process of verifying the components of the kit, cleaning, and testing devices.
- *On Hold* – Use this status if you are waiting on a replacement part or instructions from Vivify Health.

- *Delete* – Delete the kit and remove it from reprocessing.



9. If a device needs to be replaced, use the following process: Replacing a Device (RMA).

### 5.2.2 Using the Reprocessing Checklist

The Kit Reprocessing Checklist enables the Logistics team to track each component of the kit and record its status. After each component is accounted for, the reprocessing actions can be performed, and then the checklist is signed by the logistics technician and the quality control technician. Before continuing, open the checklist so you can track your progress with reprocessing. For detailed steps about how to open, fill out, sign, and complete the checklist, see [Kit Reprocessing Checklist](#).

## 5.3 Kit Reprocessing Checklist

---

The Kit Reprocessing Checklist enables the Logistics team to track each component of the kit and record its status. After each component is accounted for, the reprocessing actions can be performed, and then the checklist is signed by the logistics technician and the quality control technician. Each checklist has an Audit History feature that includes all the actions taken and who performed them. With the checklist, the team can also mark a device as replaced, which will help keep track of device locations during kit reprocessing. For example, if a device or a component has physical damage, the status will appear on the checklist.

In this document:

- Tracking Kit Components (see "Tracking Kit Components," page 94).
- Verifying Reprocessing Actions (see "Verifying Reprocessing Actions," page 95).
- Adding Notes (see "Adding Notes," page 96).
- Signing the Checklist (see "Signing the Checklist," page 96).
- Viewing Audit History (see "Viewing Audit History," page 97).
- Completing the Checklist (see "Completing the Checklist," page 97).
- Replacing a Device (see "Replacing a Device (RMA)," page 98).

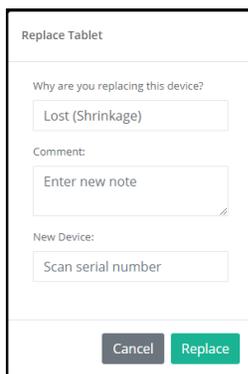
### 5.3.1 Tracking Kit Components

---

The first step for completing a Kit Reprocessing Checklist is accounting for all the components in the kit. The components can be in three statuses: Missing, Present, or Unsatisfactory.

In the **Receiving** area, for each component in the list, click a status (missing, present, or unsatisfactory).

- Select **Missing**. The device is unaccounted for and was not returned in the kit.



The Replace Device window appears.

- In the **Why are you replacing this device** list, click **Lost (Shrinkage)** or **Purchased**. Lost indicates that the device was not returned with the kit. Purchased means the patient or Care Team has paid for the device and it will not be returned.
- In the **Comment** box, type any notes that apply to this device, such as feedback from the patient about the device purchase or loss.
- In the **New Device** box, scan or type the serial number of the new device.

- Select **Present**. The device was returned with the kit and it is in working order, not broken.
- Select **Unsat**. The device is in an unsatisfactory condition and needs to be repaired or replaced.

The Replace Device window appears.

- In the **Why are you replacing this device** list, click **QA Check (Devices Only)**, **Physical Damage (Shrinkage)**, or **Purchased**. Lost indicates that the device was not returned with the kit. Purchased means the patient or Care Team has paid for the device and it will not be returned.
- In the **Comment** box, type any notes that apply to this device, such as feedback from the patient about the device purchase or loss.
- In the **New Device** box, scan or type the serial number of the new device.

### 5.3.2 Verifying Reprocessing Actions

The actions in the checklist will vary depending on the devices in the kit. In general, the steps include building and labeling the new kit box, cleaning the devices, testing power and charge level, and testing device readings.

In the **Reprocessing** area, do the following:

1. Select **Done** as you complete the action for each row.

Reprocessing	
Action	Done
Build and label new kit box	<input checked="" type="checkbox"/>
Clean tablet	<input checked="" type="checkbox"/>
Clean tablet stand	<input checked="" type="checkbox"/>

2. In the **Measured Reading** box, type the reading that appears on the device. This action verifies that the device is transmitting data to the tablet as expected.

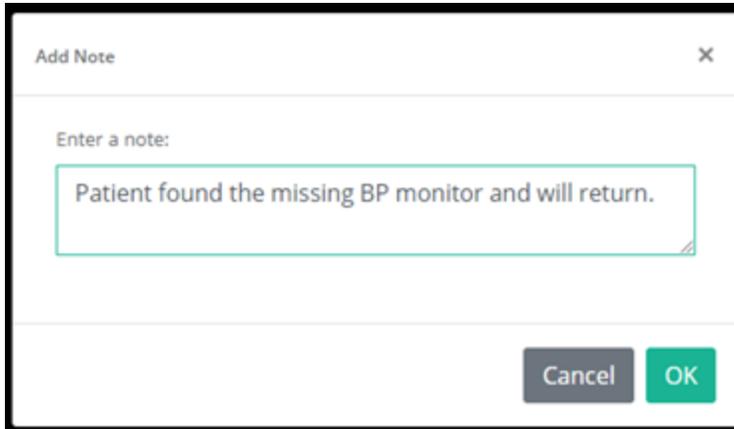
Weight scale powers on and communicates with Vivify Health software.	Measured Reading: <input type="text"/>
Blood pressure monitor powers on and communicates with Vivify Health software.	Measured Reading: <input type="text"/>

### 5.3.3 Adding Notes

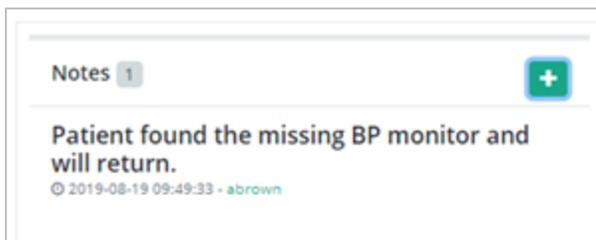
---

1. In the **Notes** area, click the  plus button.

The Add Note window appears.



2. Type information related to the kit, such as details about missing devices or broken device conditions.
3. Click **OK**. The note appears on the checklist and in the audit history.

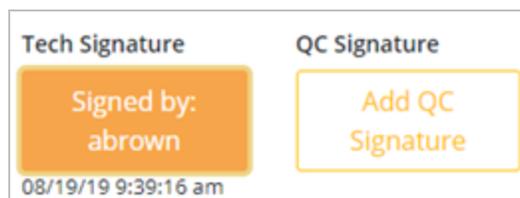


### 5.3.4 Signing the Checklist

---

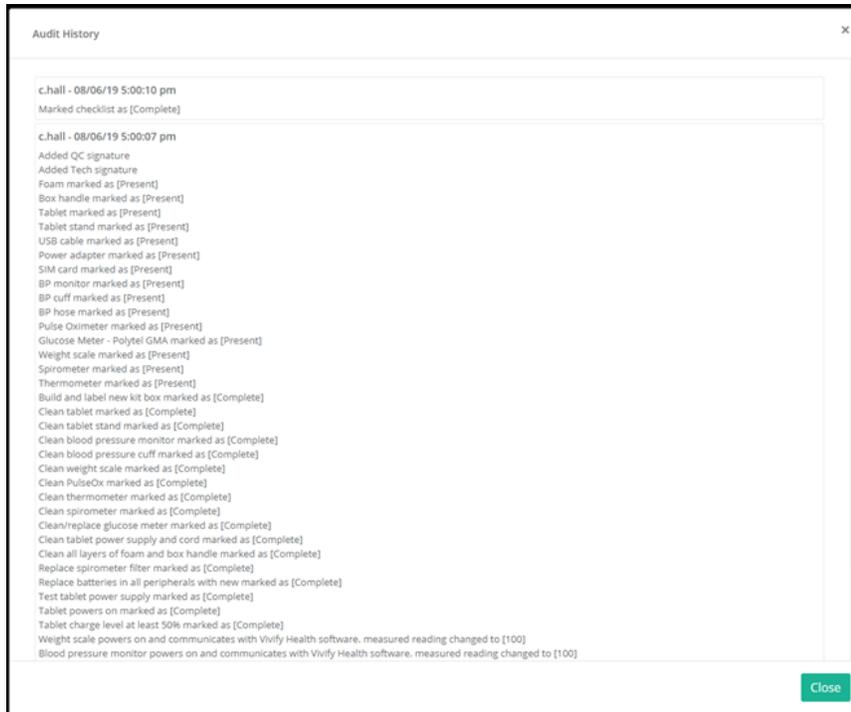
In the **Tech Signature** area, click **Add Tech Signature** to verify that you have completed the checklist and it is ready for review by the quality control technician. The date and time appear below the box, and the action is recorded to the audit history.

You can click the box again to remove your signature, but the action will still appear on the audit history.



### 5.3.5 Viewing Audit History

Every action related to the checklist is recorded in the Audit History. When another technician or manager opens the checklist, they can use the audit history to see who processed the checklist and when.



### 5.3.6 Completing the Checklist

At the bottom of the checklist, you have the following options:

- **Save & Complete.** After all steps have been completed for the checklist, click **Save & Complete**. This action puts the checklist in a read only view and prevents further editing.

When you complete the checklist, changes can no longer be made. The checklist can be opened and printed, but it cannot be changed after completed.

- **Save.** If you want to save your progress but not complete the checklist, click **Save**. Your progress will be saved, but you can still make changes to the checklist as it is not yet in final state.

- **Cancel.** If you made a change that you don't want to save, click **Cancel**. This returns you to the Kit Reprocess page.

### Kit Reprocessing Checklist

Client: Vivify Dev - Develop      Kit #: 103857      Kit Type: Full Kits

Receiving

Date Received: 8/15/2019

Component	Missing	Present	Unsat
Foam	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Box handle	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Tablet <span style="background-color: #f4a460; padding: 2px;">Lost (Shrinkage)</span> <span style="background-color: #444; color: white; padding: 2px;">Replace ▾</span>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet stand	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Power adapter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
SIM card	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
BP monitor <span style="background-color: #f4a460; padding: 2px;">QA Check (Devices Only)</span> <span style="background-color: #444; color: white; padding: 2px;">Replace ▾</span>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
BP cuff	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Pulse Oximeter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Weight scale	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Reprocessing

Action	Done
Build and label new kit box	<input checked="" type="checkbox"/>
Clean tablet	<input checked="" type="checkbox"/>
Clean tablet stand	<input checked="" type="checkbox"/>
Clean blood pressure monitor	<input type="checkbox"/>

Audit History

Cancel

Save

Save & Complete

## 5.4 Replacing a Device (RMA)

During the reprocessing of kits, some of the devices may be missing or broken and will need to be replaced. Replacement of devices is done on the reprocessing checklist. Each device in the kit has the option for Missing, Present, or Unsatisfactory. When a device is lost or has physical damage, you can select the option and scan or type a new serial number.

## 5.4.1 Replacing a device in a kit

1. In the menu, click **Logistics > Reprocess**.

The Reprocess list page appears.

2. Click the kit number with the RMA device(s).

Kit	Customer	Days	Status	Status Date	Statused By	Logistics Center	Last Note
104432	Vivify Dev - Version54	97	In Progress	03/20/2018	npatel	Vivify Development	
100110		93	Received	03/20/2018	jarredondo	Vivify Development	08/31/2017
103741	Vivify Dev - Develop	82	Received	04/04/2018	ssahs	Vivify Development	
103950	Vivify Dev - Develop	82	Received	04/04/2018	ssahs	Vivify Development	
103959	Vivify Dev - Develop	82	Received	04/04/2018	ssahs	Vivify Development	
103938	Vivify Dev - Develop	82	Received	04/04/2018	ssahs	Vivify Development	
101861	Vivify Dev - Develop	82	Received	04/04/2018	ssahs	Vivify Development	
103754	Vivify Dev - Develop	72	Received	04/18/2018	kbarnett	Vivify Development	
103918	Vivify Dev - Develop	69	Received	04/23/2018	kbarnett	Vivify Development	

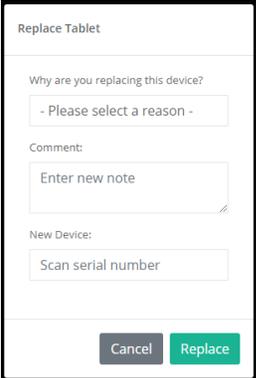
The list of kit contents appears in the Devices section.

3. In the **Actions** menu, click **In Progress**.
4. In the **Actions** menu or on the page, click **Open Checklist**.

The Kit Reprocessing Checklist appears.

5. In the **Receiving** area, for the component you want to replace, select **Missing** or **Unsat**.

If the device is		Then
Missing		<p>The Replace Device window appears.</p> <ol style="list-style-type: none"> <li>In the <b>Why are you replacing this device</b> list, click <b>Lost (Shrinkage)</b> or <b>Purchased</b>. Lost indicates that the device was not returned with the kit. Purchased means the patient or Care Team has paid for the device and it will not be returned.</li> <li>In the <b>Comment</b> box, type any notes that apply to this device, such as feedback from the patient about the device purchase or loss.</li> <li>In the <b>New Device</b> box, scan or type the serial number of the new device. If the serial number entered does not match a device, then an error message will</li> </ol>

If the device is		Then
		appear.
Broken or needs repairs		<p>The Replace Device window appears.</p> <ol style="list-style-type: none"> <li>In the <b>Why are you replacing this device</b> list, click <b>QA Check (Devices Only)</b>, <b>Physical Damage (Shrinkage)</b>, or <b>Purchased</b>. Lost indicates that the device was not returned with the kit. Purchased means the patient or Care Team has paid for the device and it will not be returned. QA check means the device needs further review by quality assurance.</li> <li>In the <b>Comment</b> box, type any notes that apply to this device, such as feedback from the patient about the device purchase or loss.</li> <li>In the <b>New Device</b> box, scan or type the serial number of the new device. If the serial number entered does not match a device, then an error message will appear.</li> </ol>

The checklist is updated with the reason for replacing the device and a Replace button appears. The Replace button is only used if the device needs to be replaced again. For more information about replacing a device that has already been replaced, see [Replacing a device that has already been replaced](#)

- Complete the checklist as described in [Kit Reprocessing Checklist](#).

### 5.4.2 Replacing a device that has already been replaced

- In the Reprocessing Checklist, in the row of the component you want to replace, click the **Replace** button, and then click **Missing** or **Unsat**.

Component	Missing	Present	Unsat
Foam	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Box handle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet <span>Physical Damage (Shrinkage)</span>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Tablet stand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
USB cable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The Replace window appears.

2. In the window, do the following:

- a. In the **Why are you replacing this device** list, click **Lost (Shrinkage)**, **Purchased**, or **QA Check (Devices Only)**.  
Lost indicates that the device was not returned with the kit. Purchased means the patient or Care Team has paid for the device and it will not be returned. QA check means the device needs further review by quality assurance.
- b. In the **Comment** box, type any notes that apply to this device, such as feedback from the patient about the device purchase or loss.
- c. In the **New Device** box, scan or type the serial number of the new device. If the serial number entered does not match a device, then an error message will appear.

3. Click **Replace**.

The checklist is updated with the reason for replacing the device. This allows technicians to fix errors and replace a device that was added while being broken. An additional replacement is shown on shrinkage as the latest item, while the intermediate item is not. Only one replace line on the shrinkage report appears, so the customer is only billed once.

4. If the rest of the checklist is complete, click **Save & Complete**. If you want to save your progress without marking the checklist as complete, click **Save**.

## 5.5 Viewing Device Audit History

A device's audit history is located on the Device Details page, in the History section. This appears as a list of entries (such as when the device was attached to a replacement request).

On Kit Component Requests for serialized devices, Logistics Portal users can view the component request, the replacement reason, and any additional information in the History section alongside user names and dates.

To view a device's audit history:

1. From the top navigation menu, click **Devices > Devices**.

A table of devices appears.

2. In the table, click a device serial number.

The Device Details page appears for the device you selected.

**Tablet Details**

**Serial Number:** 532523  
**Model:** Verizon Tab 4 (10.1 in)  
**Part Number:** SMT537VYKA  
**Internal Part Number:** SMT537VYKA  
**IMEI:** 358638035994271  
**Kit:**

**Inventory**  
**Owner:** jigsaw  
**Location:** Vivify Logistics Center  
**Condition:** QA Check  
**Purchase Order:** 1017

**Notes:**  
4:17 PM (0 minutes ago) test abrown

**History**

May 5 (7 days ago)	Removed from kit 100201	t.couch
May 5 (7 days ago)	Inventory location changed from 'Vivify Development' to 'Vivify Logistics Center'.	t.couch
May 5 (7 days ago)	Kit Component Replacement request created for this device. Replacement Reason: Not Powering On Additional Information: tim	t.couch
04/27/2022	Inventory condition changed from 'Used' to 'QA Check'.	t.couch

This information also appears in the History card on the fulfillment record for that device.

**History**

- Return Tracking Number changed from "" to '1Z90734598734534456'.  
⌚ 04/25/2022 - Vivify API
- Outbound Tracking Number changed from "" to '1Z2235XR0395836487'.  
⌚ 04/25/2022 - Vivify API
- Return Carrier changed from "" to 'UPS'.  
⌚ 04/25/2022 - Vivify API
- Outbound Carrier changed from "" to 'UPS'.  
⌚ 04/25/2022 - Vivify API
- Status changed from 'InProgress' to 'Shipped'

## Page Overviews

### 6.1 Introduction

This chapter describes the common pages used in the Logistics Portal for shipping, picking up, and receiving kits. While you may not need to use every page in the Logistics Portal to perform your job tasks, it is important to know where information about a kit is located and where you can find more details when needed.

This chapter includes the following:

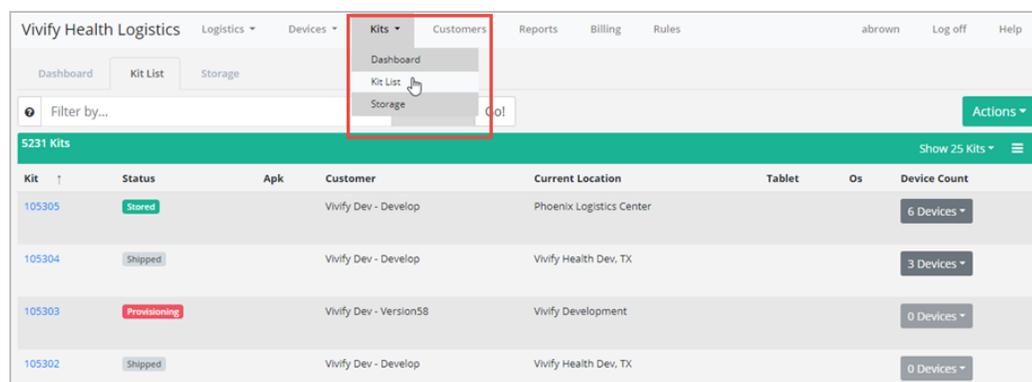
- Kit List Page (see "Kit List Page," page 103).
- Receiving Page (see "Receiving Page," page 105).
- Fulfillment Orders Page (see "Fulfillment Orders Page," page 107).
- Go Patients Search Tool (see "Go Patients Search Tool," page 115).

### 6.2 Kit List Page

The Kits List page is the central location where you can view all of the available kits and information about their status and included devices. The list has many choices for filters, so you can customize your kit options.

To open the Kit List Page, click **Kits** and then **Kit List**.

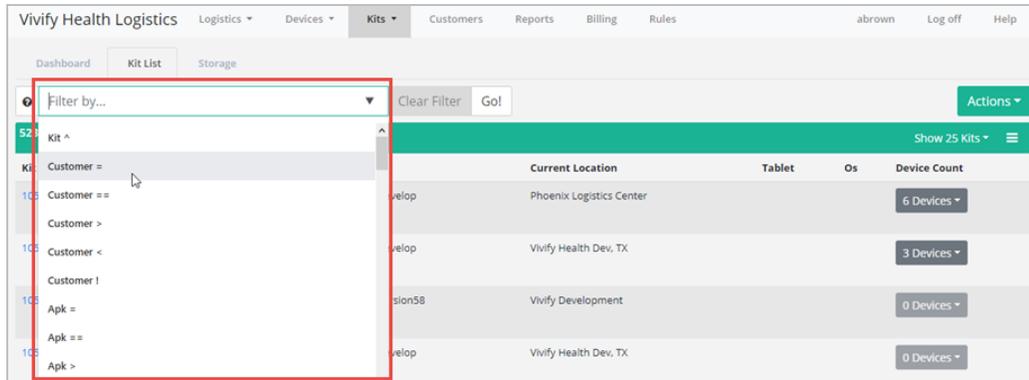
In the **Kit** column, click the number to open the **Kit Details Page**. On the Kit Details page you can edit the kit and view the included devices.



Kit	Status	Apk	Customer	Current Location	Tablet	Os	Device Count
105305	Stored		Vivify Dev - Develop	Phoenix Logistics Center			6 Devices
105304	Shipped		Vivify Dev - Develop	Vivify Health Dev. TX			3 Devices
105303	Provisioning		Vivify Dev - Version58	Vivify Development			0 Devices
105302	Shipped		Vivify Dev - Develop	Vivify Health Dev. TX			0 Devices

## 6.2.1 Filter Options

The filter options on the Kit List page allow you to customize the list to only the kits that you need to take action on. Some common filters that are used for kits are Customer, Status, and Kit Number.

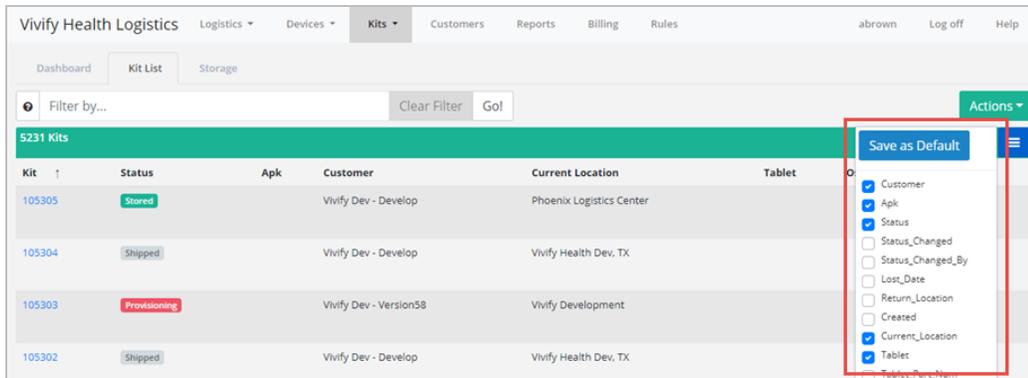


### Filter Option Tips

- Column value: Status = Lost or Device\_Count = 3
  - Exact match: == returns exact match, = returns any matches containing the value
  - Greater than and less than: Device\_Count > 1 or Kit > 105100
  - Multiple search criteria: Device\_Count > 2 & Status = Lost returns kits with more than two devices AND a lost status. | returns kits with more than two devices OR a status of lost
  - Exclude: Status ! Lost returns all kits not in a lost status
  - Kit IDs: Kit ^ 105100, 105101, 105102, 105105
- Date search options
- Exact Date: Created = 8/6/2019
  - Before and After: Created > 8/6/2019
  - Date values: Received\_Date > YESTERDAY (YESTERDAY, TOMORROW, THISWEEK, LASTWEEK, THISMONTH, LASTMONTH, THISYEAR, LASTYEAR)

## 6.2.2 List Column Options

The columns that appear on the Kit List page are customizable, so you can choose what information is available in the table. To customize the table, click the checkbox to the left of the column name option. Click Save as Default to apply the setting for every time you log in. Click out of the window to save the setting only for the current session on the page.



### 6.2.3 Actions

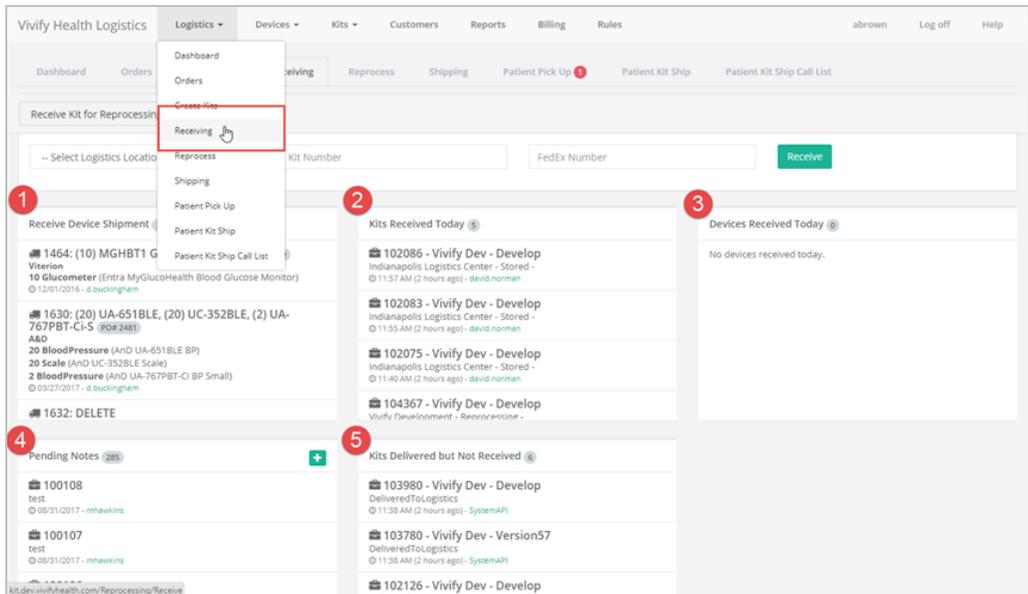
On the Kit List page, you can perform the following actions:

- **Add new kits** – Opens the Create Kits page, where the first step is creating an order.
- **Export kits** – Opens a confirmation window, so you can begin the process of exporting kits. This option exports the entire list of kits to an excel spreadsheet.
- **Update kits** – Opens a window where you can choose several options for updating kit details. Only the kits that you select in the list are updated. You can choose to **Force Sync** the changes that you make to the Care Team Portal. If you click the **Sync Status** check box, the status of those kits in the Logistics Portal will override the status in the Care Team Portal, which means manually added statuses will be replaced.

## 6.3 Receiving Page

The Receiving page is where the Logistics technician receives kits and devices for reprocessing or transfer. The transfer option allows for kits, devices, or parts to be transferred from one logistics center to another.

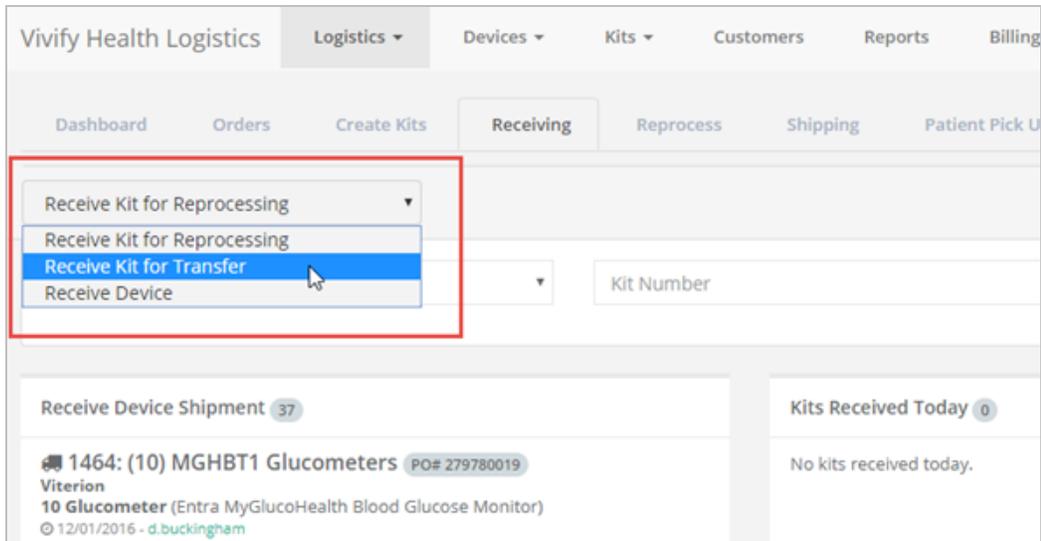
To open the Receiving page, click **Logistics** and then **Receiving**. After the location is selected, the technician scans the kit number and FedEx number and then clicks **Receive**.



The sections available on the Receiving page are as follows:

1. **Receive Device Shipments** – Information about shipment of devices, including the number of devices, type of devices, and the date.
2. **Kits Received Today** – List of the kits that have been received today, including the time and status.
3. **Devices Received Today** – List of the devices received today, including the time and status.
4. **Pending Notes** – Notes related to reprocessing or storing kits in the order. You can add a note with the green plus button.
5. **Kits Delivered but Not Received** – Kits that are currently in the status of Delivered to Logistics, but have not yet been checked in to the warehouse (received).

On the Receiving page, options are available for Receive Kit for Reprocessing, Receive Kit for Transfer, and Receive Device.



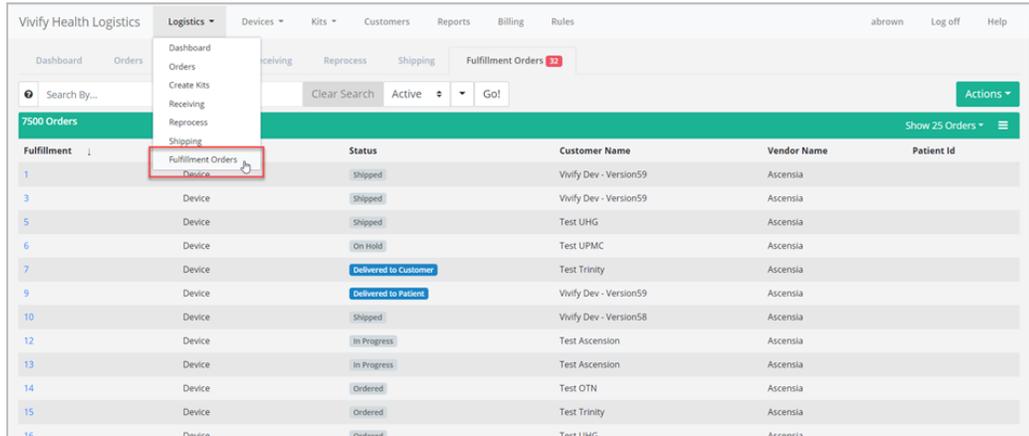
## 6.4 Fulfillment Orders Page

The Fulfillment Orders page is the central location in the Logistics Portal for replacing devices and parts and fulfilling kit ship and kit pickup orders. You can create +Go device and kit component replacement orders, check an order's status, and ship or schedule orders from this page.

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

## 6.4.1 Fulfillment Orders List Page

To open the Fulfillment Orders List, click **Logistics** and then click **Fulfillment Orders**.



### Fulfillment Types

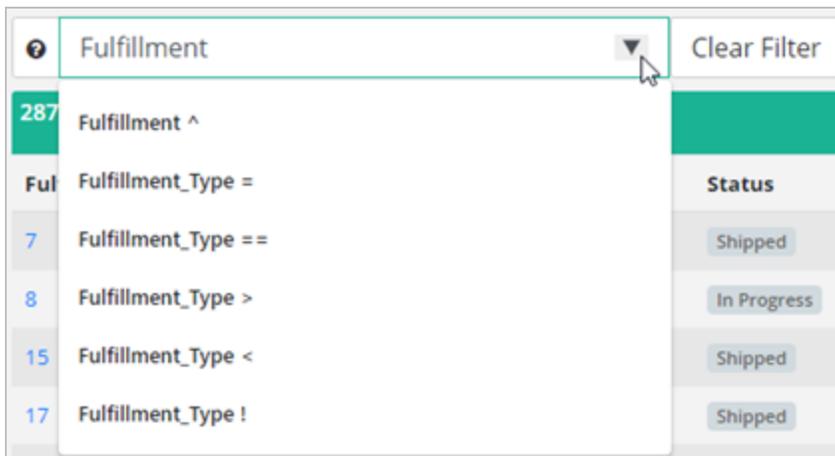
- **Kit Pickup** – Pickup orders appear with the Fulfillment type Kit Pickup.
- **Kit Ship** – Ship orders appear with the Fulfillment type Kit Ship.
- **Kit Component Replacement** – Orders to replace broken or missing devices in existing kits. These orders are created on the Kit Details page from the **Actions > Request Component Replacement** menu.
- **Device** – Orders for +Go devices from vendors Ascensia and Hypertec. These orders are created on the Fulfillment Orders List page from the **Actions > Create Device Order** menu.

### Filter and Sort

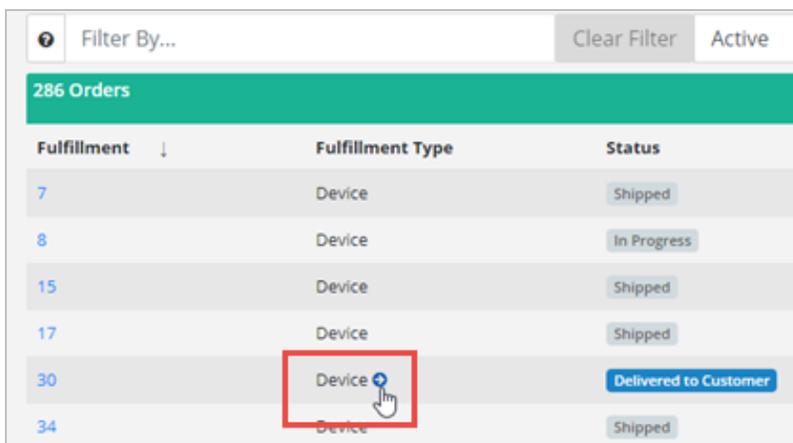
The filter options on the Fulfillment Orders List page allow you to customize the list to only the orders that you need to take action on. Some common filters that are used for orders are **Fulfillment Type**, **Kit ID**, or **Status**.

To filter the list, do either of the following:

- In the Filter By field, type a column title to filter by or use the down arrow to view available filter options.



- In the list, to the right of any of the values in the table, click the arrow icon (↕). The list will reload with the filter applied for that value. To add another filter, click the plus icon (+).



Fulfillment Type == Device			Clear Filter	Active
264 Orders				
Fulfillment	Fulfillment Type	Status		
7	Device	Shipped		
8	Device	In Progress		
15	Device	Shipped		
17	Device	Shipped		
30	Device	Delivered to Customer		
34	Device	Shipped		

Fulfillment Type == Device & Status == Deliver			Clear Filter	Active
2 Orders				
Fulfillment	Fulfillment Type	Status		
30	Device	Delivered to Customer		
62	Device	Delivered to Customer		

### List Column Options

The columns that appear on the Fulfillment Orders List page are customizable, so you can choose what information is available in the table. To customize the table, click the checkbox to the left of the column name option. Click **Save as Default** to apply the setting for every time you log in. Click out of the window to save the setting only for the current session on the page. The Fulfillment Type column shows you the type of order (Device, Kit, and Kit Component Replacement), which is helpful in determining if the order is for a +Go device or a Kit device.

### 6.4.2 Fulfillment Orders Detail Page

This page includes statuses, reference information, internal notes, dates, history, and other details. Logistics Portal users can review all information related to kit device orders, +Go device orders, and kit ship orders from this page.

## Fulfillment Orders Detail Page (Kit Component Replacement)

Dashboard Orders Create Kits Receiving Reprocess Shipping **Fulfillment Orders**

Back to list

Fulfillment: 162 - Kit: 100168 - jigsaw Actions

Status History

Ordered 3/10/2022

Current Status

In Progress 3/10/2022

Replace Component(s) Ship

Record Information

Fulfillment Type: Kit Component Replacement  
Kit Pool: Default Kit Pool  
Kit Type: Tablet + BP  
Kit Id: 100168  
Logistics Location: Vivify Development  
Replacement Reason: BP Cuff Not Inflating/Deflating

Contact Attempts: 0  
Update Contact Attempts

Agent: Assign Agent

Replacement Components

Batteries  
Old: Scale Batteries - SCALE BATTERIES (Scale Batteries)  
BP Cuff  
Old: BP Cuff Medium (fits UA-651) SIZE 9.4"-14.2" OTN ONLY - 00221 (UA 290)  
Power Adapter  
Old: Adapter 30 Pin - 3001-TC (3001-TC)  
Scale  
Old: Welch Allyn Weight Scale (RPM-SCALE100) - 00227(300001)

Ship To Address

Address:  
Jack Frost  
7201 Bishop Rd.  
Plano, TX 75024  
+1 (817) 555-9999  
Language:  
English

Pick Up Date

Scheduled Date:  
None  
Schedule

Pick Up Date:  
None  
Picked Up

## Fulfillment Orders Detail Page (Device)

Vivify Health Logistics **Logistics** Devices Kits Customers Reports Billing Rules abrown Log off Help

Dashboard Orders Create Kits Receiving Reprocess Shipping Patient Pick Up **Fulfillment Orders** 29

Back to list

Fulfillment: 41 - Health Actions

Status History

Ordered 11/12/2019 In Progress 1/30/2020 Shipped 1/30/2020

Current Status

Delivered to Patient 4/2/2020

Complete

Reference Information

Contact Caregiver:

Billing Information:  
Encounter Id:  
Patient DOB:  
Organization:  
Carrier Escalation #: 5  
Support Case Number: 234

Devices/Parts

Vendor: Ascensia

Glucometer : Contour Next One  
Quantity: 1  
Glucometer : Contour Next One  
Quantity: 999  
Glucometer : Contour Next One  
Quantity: 377  
Glucometer Strips : Contour Next One Refill Kit includes 200 strips and lancets  
Quantity: 1  
Glucometer Strips : Contour Next One Refill Kit includes 200 strips and lancets

Ship To Address

Address:  
John2 Johnson  
738 Flower Alley #735  
12 Parkwood blvd  
Dallas, ON A1B 1C1  
111-555-1234  
+01 222-222-4444  
Track:  
Purulator - E24000000004

History

Status changed from 'Shipped' to 'DeliveredToPatient'.  
04/02/2020 - system  
Outbound Tracking Number changed from " " to 'E24000000004'.  
04/02/2020 - david.norman  
Address changed from ' John2 Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, TX 75207, 111-555-1234 +01 222-222-4444' to ' John2 Johnson, 738 Flower Alley #735 12 Parkwood blvd Dallas, ON A1B 1C1, 111-555-1234 +01 222-222-4444'  
04/02/2020 - david.norman  
Address changed from ' John Johnson, 738 Flower Alley #735 12 Parkwood blvd

Internal Vivify Notes

No notes.

## Fulfillment Orders Detail Page (Kit Ship)

Dashboard Orders Create Kits Receiving Reprocess Shipping **Fulfillment Orders 53**

[Back to list](#)  
Fulfillment: 44758 - Kit: 320208 - v202203 Actions ▾

**Status History**

Ordered  
4/27/2022

**Current Status**

In Progress  
4/27/2022  
Ship

**Record Information**

Fulfillment Type: Kit Ship  
Kit Pool: Default Kit Pool  
Kit Type: Tablet + BP + PulseOx  
Kit Type Configuration: VIV009C11  
Kit Id: 320208  
Logistics Center: Phoenix Logistics Center  
BP Cuff Size: Wide Range  
Scale Type: None

Contact Attempts: 0  
Update Contact Attempts

Agent:  
Assign Agent

**Devices 4**

Condition: New

PulseOx: Nonin 9569 Onyx II  
Serial Num: 357287100154618  
Condition: New

BloodPressure: AnD UA-651BLE BP  
Serial Num: 32342438  
Condition: New

SIM: VZ Consumer SIM  
Serial Num: 25184418170903159448  
Condition: New

**Ship To Address**

Address:  
Jack Frost  
7201 Bishop Rd.  
Plano, TX 75024  
+1 (817)-555-9999

Language:  
English

Program:

**Kit Ship Date**

Preferred Welcome Call Date:  
5/2/2022  
Morning (AM)

Next Scheduled Call:  
Schedule

## Fulfillment Orders Detail Page (Kit Pickup)

Vivify Health Logistics **Logistics** Devices Kits Customers Reports Billing Rules abrown Log off Help

Dashboard Orders Create Kits Receiving Reprocess Shipping **Fulfillment Orders 32**

[Back to list](#)  
Fulfillment: 36877 - Kit: 113984 - 202012 Actions ▾

**Status History**

Customer Pickup  
1/8/2021

Received  
1/8/2021

Reprocessing  
1/8/2021

Device Missing  
1/8/2021

**Current Status**

Pending Lost  
Could not reach patient  
1/8/2021  
Complete

**Record Information**

Fulfillment Type: Kit Pickup  
Kit Pool: Physical Kit  
Kit Type: Full Kits  
Kit Id: 113984  
Logistics Center: Vivify Development

Contact Attempts: 0  
Update Contact Attempts

Agent:  
Assign Agent

**Devices 6**

Scale: AND UC-321PBT Scale  
Serial Num: 5130550179  
Condition: Used

Tablet: Galaxy Tab A 8.4"(2020),32GB,(Verizon)  
Serial Num: 352250112771972  
Condition: Used

PulseOx: SHENZHEN CREATIVE PC60-FW  
Serial Num: 976903970711  
Condition: Used

**Pick Up Address**

Address:  
Abby Tarnosky  
3333 Preston Rd  
Frisco, Tx 75034  
+1 (313)-555-5555

Track:  
FedEx - 58-55

**Pick Up Date**

Preferred Date:  
1/13/2021  
Morning (AM)

Scheduled Date:  
Schedule

Pick Up Date:  
Picked Up

This page includes sections for the following information:

- **Status History and Current Status:** Status History shows the progress the order has completed through the various states, including the date of transition. Current Status shows the date the order entered into its current status and gives an option to process the order to the next step in the workflow.

The following status types are supported:

### Status Types

- Ordered
- In Progress
- Shipped
- Delivered to Patient
- Delivered to Customer
- Delivered to Logistics
- Called
- Scheduled
- Picked Up
- Received
- Complete
- Canceled
- On Hold

Each status has a button that allows you to move the record to the next step in the process. When a record is placed On Hold, users can click **Resume** to move the record back to the previous status.

- **Replacement Components** (Fulfillment Type Kit): Lists the type of device that has been requested to be replaced and includes the old and new model and serial number. Clicking the device serial number opens the Device Details page, where you can view the history of the device and other information. The Replacement Components section only appears in records with the Fulfillment types of Kit and Kit Component Replacement.
- **Devices/Parts** (Fulfillment Type Device): Lists the vendor, type of device or part, and amount that is included in the order. The Devices/Parts section only appears for the Fulfillment Type of Device.
- **Ship To Address:** Lists the address, language, and tracking number for the order. Clicking the tracking number opens the FedEx site.

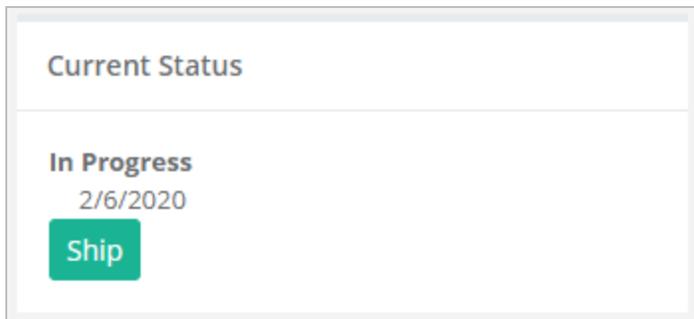
Note: Only the last 14 digits of FedEx bar codes will be saved in the Ship To Address card. (This does not apply to UPS and USPS numbers.)

- **Pick Up Date:** Shows the retrieval dates of the old device and the Scheduled Date and Pick Up Date, with options to reschedule and mark as picked up (if the order has shipped).
- **Reference/Record Information:**
  - Kit Component Replacement Fulfillment Type: Includes Kit Pool, Kit Type, Kit Id, Logistics Location, Replacement Reason, and Contact Attempts.
  - Device Fulfillment Type: Includes Contact Caregiver (Name, Phone Number, and Email of the assigned Care Team member) and Billing Information (Encounter Id, Patient DOB, Organization, Carrier Escalation #, and Support Case Number). Carrier Escalation # and Support Case Number fields can be edited.
  - Kit Ship Fulfillment Type: Includes Kit Pool, Kit Type, Kit Type Configuration, Kit Id, Logistics Center, BP Cuff Size, Scale Type, and Contact Attempts.
  - Kit Pickup Fulfillment Type: Includes Kit Pool, Kit Type, Kit Id, Logistics Center, and Contact Attempts.
- **Internal Vivify Notes:** Comments or information about the order.
- **History:** History information related to the current fulfillment record, including status changes, pick up dates and times, and any changes made to the order information.

### 6.4.3 Ship Fulfillment Order Page

---

On the Fulfillment Orders Detail page, click **Ship** to open the Ship Fulfillment Order page.



#### Ship Fulfillment Order Page

The same fields are required as when shipping kits. At the bottom of the screen, you can see all the fulfillment records that have been shipped today, along with relevant details.

Vivify Health Logistics | Logistics | Devices | Kits | Customers | Reports | Billing | Users | Rules | abrown | Log off | Help

Dashboard | Orders | Create Kits | Receiving | Reprocess | **Shipping** | Fulfillment Orders

Ship Fulfillment Order

1233 | FedEx | Tracking Number | FedEx | Return Tracking Number

Name: David Norman | Attention: | Country: |  
 Address Line 1: 1234 Main St | Address Line 2: | City: McKinney |  
 State: TX | Zip Code: 75071 | Phone Number: 214-555-5555 |  
 Phone Number 2: | Email: |

**Ship** Cancel

Fulfillment Orders Shipped Today

No orders shipped today.

## Shipping Page (Ship Fulfillment Order Option)

After shipping the fulfillment order, the Shipping page appears. Users can do one of the following actions:

- Scan a kit number to populate the **Kit Number** field.
- Type a kit number into the **Kit Number** field.
- Select a shipping container from the **Select Shipping Container** list menu.

After doing one of the actions described above, users can click **Fetch** to search for the desired results.

Dashboard | Orders | Create Kits | Receiving | Reprocess | **Shipping** | Fulfillment Orders

Fulfillment Order shipped successfully!

Scan a kit number or enter a fulfillment id or select a shipping container to ship kits

Kit Number | or | Fulfillment I | or | -- Select Shipping Container | **Fetch**

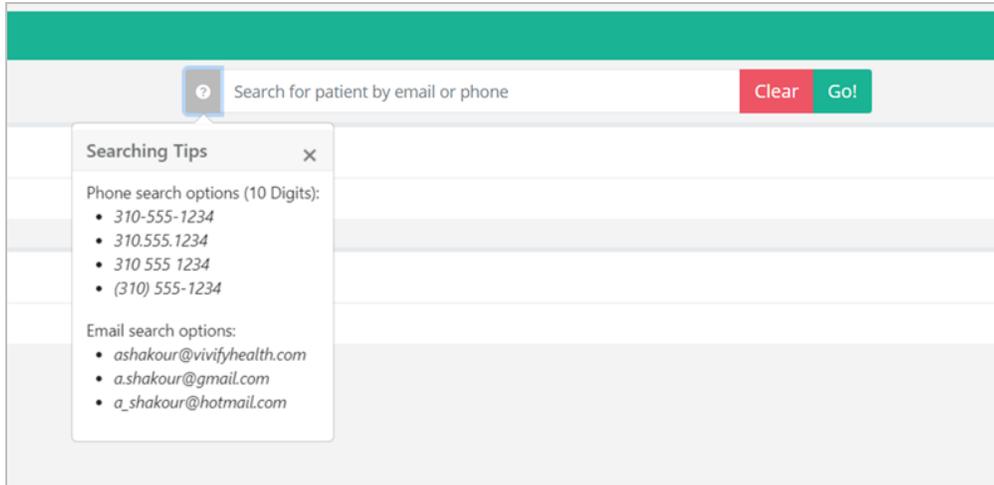
## 6.5 Go Patients Search Tool

Vivify Support can search for a +Go patient by email or phone number from within the Logistics Portal on the Customer page, so they can identify the patient's Care Team Portal and applicable details. The +Go patient's phone numbers and email are matched across portals when searching, so the most recent information in the Care Team Portal is available to Vivify Support.

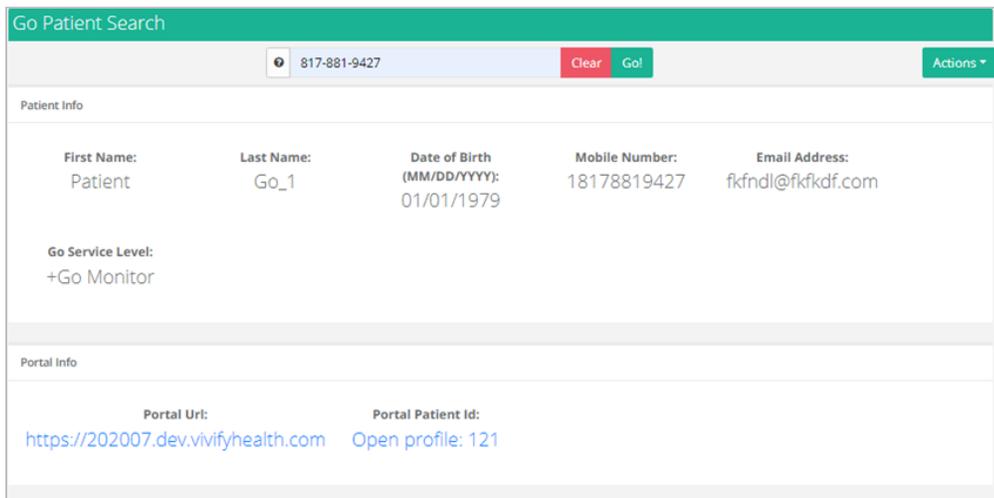
Patient details, such as their portal, patient ID, phone number or email, and device are visible, so the support agent can help the patient when issues arise. When a Vivify Support Agent clicks the Portal Patient ID link, they will be directed to the Patient's

profile, so they do not have to perform a patient search when logging in. When a Vivify Support Agent clicks the Portal URL link, they will be directed to the Patients list.

**Example: Go Patient Search Page with Search Tips**



**Example: Go Patient Search with Results**



## Appendix A: Specification Documents Reference

Tasks	Title of Document	Document Location in Grand Avenue
Configuring the tablet	Transfer of Vivify Software (APK)	SPEC00676
Assembling kits	Kit Assembly	SPEC00535
	Production (Kit Build) Order	SPEC00708
Validation and testing	Functionality and Accuracy Testing	SPEC00608
	Product Verification/Acceptance	SPEC00486
Distribution	Product Distribution	SPEC00531
	Distribution (Kit Ship) Order	SPEC00710
Reprocessing	Kit Component Reprocessing	SPEC00566
Handling returned products and replacements	Handling of Returned Products	SPEC00537
	Replacement Order Fulfillment	SPEC00610
	Handling of Returned Complaint Products	SPEC00485