

Global Service Standards

How to use Service Activity Codes

Version: 7.0

Date: December 09, 2008

DOCUMENT INFORMATION

General Information

Project Name	Global Service Standards
Document Name	How to use Service Activity Codes
Document Location	Project Office
Associated Documentation	Service Activity Codes V 1.0 (or higher)

Author

Name	Dept.	Signature	Date (mm/dd/yyyy)
Frank Praxl	LG-I	<i>please check signature in DocIT</i>	

Review

Name	Dept.	Signature	Date (mm/dd/yyyy)
Sabine Philippi-Schulz	LG-I	<i>please check signature in DocIT</i>	
Jens Woehler	VS-C3	<i>please check signature in DocIT</i>	
Hans-Georg Seiberlich	LG-Q	<i>please check signature in DocIT</i>	

Approval

Name	Dept.	Signature	Date (mm/dd/yyyy)
Wolfgang Liebscher	LG-I	<i>please check signature in DocIT</i>	

Document History

Version	Reason for change	Date (mm/dd/yyyy)
1.0	first release	06/12/2003
1.1	added codes Z77, Z78; added expanded definition for code Z49, added notes for codes Z31, Z62, Z63 and Z76	07/05/2004
2.0	added code Z44, deleted code W05, renamed codes W02 and W12 (including description and notes)	01/27/2005

4.0	<p>changed to v4.0 to be compliant with DocIT versioning</p> <p>added codes Z26, Z85</p> <p>deleted codes R03, R04, R05, R11, R12, W06, renamed codes A06, A07, A15 (including description and notes)</p> <p>changed description for codes A14, Z21, Z22, Z31</p>	12/05/2005
5.0	<p>Introduction chapters updated</p> <p>Marks added whether a code is released for “Service Activity” pop-up list or User Time log in PRISMA Clarify</p> <p>Codes added: A16, A17, Z90</p> <p>Codes renamed: A14, Z45, Z46, updated the respective expanded definitions</p> <p>Some expanded definitions updated to indicate that these codes can be used by engineer personnel as well as application specialists (Z21, Z22, z23, Z30, Z31, Z32, Z73, Z77)</p> <p>Some expanded definitions changed: A15, R09, Z61, Z63, Z76 (added information)</p>	03/20/2007
6.0	<p>Document name changed</p> <p>Added codes Z97, Z98</p> <p>Renamed codes R09, Z49</p> <p>Set SAC released flag for code W08, Z84, Z88, Z90, Z91 (according to DMS settings)</p> <p>Changed expanded definitions of code R09, Z22, Z49, Z62, Z88 and Z91</p>	01/15/2008
7.0	<p>Added code Z79</p> <p>Removed codes Z11, Z12, Z29 and Z82 from User Time Log</p> <p>Removed a document reference in code Z21, Note 4</p> <p>Additional note for code Z44</p>	As of approval

Distribution

Department / Area / Function

Purpose

In addition to the commercial use of the Service Activity codes, invoicing, cost control etc., the Service Activity codes form the primary source of local and global quality and comparative statistics ranging from:

- Mean Time Between and Mean Time For calculations
- Spare parts and labour hours statistics
- Forecasting and budget monitoring
- Monitoring of product and service improvement initiatives
- Predicting resource requirements, manpower, stock levels etc.
- Monitoring and costing of specific support activities.

One of the major problems experienced when comparing activity and statistical reports from affiliates is, that the usage and interpretation of the Service Activity codes varies between countries, and very often between reporters from within a country.

These differences in usage of the Service Activity codes can lead to significant errors in statistical analysis, and possibly have a detrimental effect upon the interpretation of customer support events.

To overcome the problems of code interpretation and usage, an additional expanded definition field, detailing the code usage and reporting conventions has been added to the existing Service Activity codes.

Definitions

- **pool repair** –workshop repair activities on a local pool of instruments (instruments which won't be shipped back to a customer immediately after repair)

Service Activity Codes

User Time Log released				
Service activity code released				
Code	Description	Explanation		
A06	Customer training (on site, follow-up)	Perform follow up customer training on instrument or application related topics on customer premises	X	
A07	Customer training (in house, follow-up)	Perform follow up customer training on instrument or application related topics on Roche premises	X	
A08	Correlation activities	Provide a "between" method correlation service to existing or potential Roche customers	X	X
A09	Product conversion	Provide advice and methodology for alternative reagents to existing or potential Roche customers	X	X
A10	System calibration	Provide a calibration service for systems	X	
A11	Regulatory affaires	Provide advice for regulatory affaires related to reagent / application issues	X	X
A14	SW modification (mandatory)	Provide a mandatory software update to existing ROCHE customers	X	X
A15	Customer Training (initial)	Provide initial or contracted customer training, on site or in house	X	
A16	SW modification (optional)	Provide an optional (chargeable) software update to existing ROCHE customers	X	X
A17	Appl Corrective Action (mandatory)	Provide a mandatory corrective action on Application and Reagent issues to existing ROCHE customers	X	X
R06	Send replacement instrument	Arrange for a replacement instrument to be delivered to customer site and for the defective instrument to be returned	X	
R07	Send reagent products	Arrange for a replacement test kit / control / calibrator / test strip be send	X	
R08	Send information\or documentation	Send information or documentation to a customer / customer engineer / Roche engineer	X	X
R09	Case dispatch to CHU	Send the case to the complaint handling unit of the business area	X	

User Time Log released				
Service activity code released				
Code	Description	Explanation		
W01	WS Instrument repair	Repair of used instrument returned from field and return to customer site	X	
W02	WS Instrument pool repair	Repair of used instrument returned from the field and returned to used instrument pool	X	
W03	WS Instrument retrofit	Retrofit of used instrument returned from the field and returned to customer site	X	
W04	WS PCB / Module repair	Repair & COC of PCB / Module returned from field	X	X
W07	WS New instrument prep	Preparation / pre-installation check of new instrument prior to delivery to customer	X	
W08	WS New PCB / Module prep	Preparation / pre-installation check of new / COC part prior to delivery to field engineer / customer	X	X
W09	WS Demo instrument prep	Preparation / performance testing of instrument prior to sales demonstration	X	
W10	WS Instrument pre-repair inspection	Goods in inspection prior to starting workshop repair / refurbish / retrofit actions	X	
W11	WS Quality assurance check	Time spent ensuring correct operation / function of repaired / refurbished / retrofitted instrument / PCB or module	X	X
W12	WS OEM part pool repair	Repair & COC of Generic host system parts or modules, together with the repair of other OEM products	X	X
W13	Instrument re-certification CU Center	Re-certification of used instrument returned from the field (CU site rework)	X	
Z00	Please Specify	Default	X	X
Z11	Support by Phone	Phone time	X	
Z12	Tele/Remote Diag	Remote Connection time	X	
Z21	ServVisit Em'cy	On-site technical correcting, un-planned	X	
Z22	ServVisit NonEm'cy	On-site technical correcting planned	X	

User Time Log released				
Service activity code released				
Code	Description	Explanation		
Z23	ServVisit Assist	Giving on-site technical assistance to a colleague.	X	
Z24	ServVisit Cont'd	Continuation of a Support Visit on another day	X	
Z25	ServVisit Repeat	Consecutive visit for repairing the same instrument within 5 working days	X	
Z26	ServVisit Intervention	On-site technical correcting caused by wear parts like ISE, electrodes, needles, etc. or caused by handling errors	X	
Z29	Cancelled Call	Cancelled upon arrival at customer's site - no support work done	X	
Z30	ApplVisit Em'cy	On-site error correcting: = Support Visit Un-planned	X	
Z31	ApplVisit NonEm'cy	On-site application correcting planned	X	
Z32	ApplVisit Assist	On-site application correcting (time independent)	X	
Z33	ApplVisit Cont'd	Continuation of an application Visit on another day	X	
Z34	ApplVisit Repeat	Consecutive application visit the same instrument within 5 working days	X	
Z41	PM Visit	Preventive Maintenance work	X	
Z42	PM Visit Assist	Giving on-site PM assistance to a colleague	X	
Z43	PM Visit Cont'd	Continuation of a PM Visit on another day	X	
Z44	ApplVisit PM	Preventive maintenance activities in the application area	X	
Z45	HW modification (mandatory)	Visit for carrying out a mandatory retrofit / modification / update of a system	X	X
Z46	HW modification (optional)	Visit for carrying out a update of a system (chargeable)	X	X

User Time Log released				
Service activity code released				
Code	Description	Explanation		
Z49	Parts Delivery / Management	Instrument related parts delivery - without any other service activity, except follow-up phone call	X	X
Z51	Valid'n/Accredit'n	Validation / accreditation of a system according to local rules	X	X
Z61	Site Preparation visit	On-site Preparation visit without instrument serial number	X	
Z62	Installation	Installation of an instrument / system	X	
Z63	De-Inst/Removal	De-install / remove an instrument / system Including decontamination	X	
Z64	Relocate System	Relocate a instrument / system to an other room or site (same customer)	X	
Z73	Installation Assist	Giving on-site Installation assistance to a colleague	X	
Z74	Installation Cont'd	Continuation of Installation on another day	X	
Z75	Installation completion	Visit to obtain customer acceptance	X	
Z76	Host / Connection & installation	Technical actions associated with connecting instruments to LIM/LIS host system	X	
Z77	Install applications	Installation of applications on a newly installed instrument	X	
Z78	Install new host connection	Connecting a newly installed instrument to LIM/LIS host systems	X	
Z79	Routine Start / Go-Live	Visit to indicate that the instrument is now running in routine mode	X	
Z82	Courtesy Visit	Visit by FSR for no specific technical / application reason or unscheduled technical check (foc)	X	
Z83	Sales Assistance	Assisting sales & marketing related activities such as: demo, shows, evaluation	X	X
Z84	Laboratory organisation consulting	Actions associated with lab work flow optimisation	X	X

User Time Log released				
Service activity code released				
Code	Description	Explanation		
Z85	Customer IT SW Configuration	Actions associated with configuration of Customer IT tools	X	X
Z86	Peripheral Hardware visit	Technical actions including installation associated with peripherals e.g. Printers, UPS, water supply systems	X	
Z88	Support Training	Reporting on completed training off support staff	X	X
Z90	Pre-Marketing/Design	Assisting Research and Development for pre-marketing related activities such as attending roundtables or workshops for design input, customer shows as pre-marketing activities, support of pre-marketing evaluations	X	X
Z91	Admin. /Office		X	X
Z97	Empty Field	for internal data processing, not to be used in Clarify		
Z98	Not Global	for internal data processing, not to be used in Clarify		

Service Activity Codes Expanded Definitions

A06	Customer training (on site, follow-up)	Perform follow up customer training on instrument or application related topics on customer premises
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Code A06, Customer training (on site, follow-up), to be used when performing follow up (chargeable), formal or informal training of the customer on Roche supplied products, either at the customer site or in an off site location specified by the customer.

A07	Customer training (in house, follow-up)	Perform follow up customer training on instrument or application related topics on Roche premises
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Code A07, Customer training (in house, follow-up), to be used when performing follow up (chargeable), formal or informal customer training on Roche supplied products, either on a Roche site or in an off site location specified by Roche.

A08	Correlation activities	Provide a "between" method correlation service to existing or potential Roche customers
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Code A08, Correlation activities, to be used when performing method correlation studies, typically when converting a customers existing assay method to a Roche supplied product assay method, these correlation studies could take place either on the customers site, at a Roche site, or when required both in-house and on the customers site.

A09	Product conversion	Provide advice and methodology for alternative reagents to existing or potential Roche customers
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Code A09, Product conversion, to be used when providing information, product benefits or methodology for Roche supplied products, typically when converting a customer from a competitor reagent to a Roche reagent, or when converting a customer from an existing Roche product to a new product or pack size.

A10	System calibration	Provide a calibration service for systems
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Code A10, System calibration, to be used when calibrating a Roche supplied instrument or reagent, typically, at the customer's site on an application-troubleshooting visit or by special request from the customer.

Note1: Countries which do not have to distinguish between system calibrations and other application activities may use Z31, ApplVisit NonEm'cy, to record these activities

A11	Regulatory affaires	Provide advice for regulatory affaires related to reagent / application issues
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Code A11, Regulatory affaires, to be used when advising new or existing customers on aspects of both locally or international regulations regarding Roche supplied reagents, controls, calibrators etc together with any regulatory requirements regarding their corresponding application.

A14	SW modification (mandatory)	Provide a mandatory software update to existing ROCHE customers
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Code A14, SW modification (mandatory), to be used when providing a mandatory (quality driven) software update service to customers on Roche supplied instruments or products, typically at the request of the manufacturer to improve product quality or reliability (e.g. via service bulletin). This update could be performed on the customers site as an operator / operating or software version update, but may also be carried out in-house or by remote connection.

Note1: TASU¹ updates (or other test definition updates) should not be recorded against this code. Code Z31, ApplVisit NonEm'cy, should be used for TASU (and other test definition) updates

Note2: For mandatory hardware modifications, code Z45 HW modification (mandatory) should be used.

A15	Customer Training (initial)	Provide initial or contracted customer training, on site or in house
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Code A15, Customer Training (initial), to be used when performing an initial, formal or informal training of the customer on Roche supplied products, either on a Roche or customer site. This training is part of the installation phase of an instrument.

Note1: This initial training is included in selling an instrument to the customer (or reagent rental contract, etc.), internally this service activity will be booked against the instrument costs

A16	SW modification (optional)	Provide an optional (chargeable) software update to existing ROCHE customers
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Code A16, SW modification (optional), to be used when providing an optional (chargeable) software update service to customers on Roche supplied instruments or products, typically this would be at the request of the customer to improve the performance, specification or productivity of the instrument. This update could be performed on the customers site as an operator / operating or software version update, but may also be carried out in-house or by remote connection.

Note1: TASU² updates (or other test definition updates) should not be recorded against this code. Code Z31, ApplVisit NonEm'cy, should be used for TASU (and other test definition) updates

Note2: For optional hardware modifications, code Z46 HW modification (optional) should be used.

¹ TASU: test application settings, update

² TASU: test application settings, update

A17	Appl Corrective Action (mandatory)	Provide a mandatory corrective action on Application and Reagent issues to existing ROCHE customers
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Code A17, Application corrective action (mandatory), to be used when providing a mandatory (quality driven) update/corrective action service to customers on Roche supplied products, typically at the request of the manufacturer to improve product quality or reliability (e.g. via customer information letter/service bulletin/product bulletin). This update could be performed on the customers site as a corrective action regarding applications (e.g. replacement of reagents, wear parts, consumables, training update, etc.), but may be carried out in-house by the call center (via telephone, replacing reagents, sending out an information letter, etc).

Note 1: TASU updates (or other test definition updates) should not be recorded against this code. Code Z31, ApplVisit NonEm'cy, should be used for TASU (and other test definition) updates

Note 2: For mandatory hardware modifications, code Z45 HW modification (mandatory) should be used.

Note 3: For mandatory software modifications, code A14 SW modification (mandatory) should be used.

R06	Send replacement instrument	Arrange for a replacement instrument to be delivered to customer site and for the defective instrument to be returned
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Code R06, send replacement instrument, to be used by the call centre operator to record an instrument replacement action, typically this would be to arrange for a short term loan instrument to be shipped to the customer and for the return of the defective instrument to the Roche site for repair.

R07	Send reagent products	Arrange for a replacement test kit / control / calibrator / test strip be sent
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Code R07, Send reagent products, to be used by the call centre operator to record a reagent product replacement action, typically this would be to arrange for the replacement of a reagent kit, control, calibrator or test strip, deemed to be defective, damaged, faulty, or where incorrect handling / storage during shipment is suspected.

R08	Send information\or documentation	Send information or documentation to a customer / customer engineer / Roche engineer
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Code R08, Send information / or documentation, to be used by the call centre operator to record an information or documentation transfer action, typically this would be to send a reagent pack insert or specific / technical product information to the customer, customer agent or, on request to a Roche engineer or application specialist.

Note1: Sending documentation for product conversion activities should not be recorded against this code, Code A09 Product conversion should be used to record such activities

R09	Case dispatch to CHU	Send the case to the complaint handling unit of the business area
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Code R09, Case dispatch to CHU, to be used to record the dispatch of a case to the global complaint handling unit (CHU) in GSS.

Note1: All activities with the complaint handling unit CHU should be reported within the local case using this code. Activities with the customers (e.g. forwarding feedback received from CHU) are to be reported either as phone support or service / application visits.

W01	WS Instrument repair	Repair of used instrument returned from field and return to customer site
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Code W01, Instrument repair, to be used exclusively by the workshop personal to record the workshop repair of an instrument returned from a customer site and after repair returned back to the customer site.

Note1: Actual repair times and all parts used for the workshop repair should be recorded against this code.

Note2: Repair viability inspections and post repair quality assurance check times are not to be recorded with this code, any such activities should be recorded under codes W10 and W11 respectively.

W02	WS Instrument pool repair	Repair of used instrument returned from the field and returned to used instrument pool
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Code W02, Instrument pool repair, to be used exclusively by the workshop personal to record the workshop repair of an instrument returned from the field and after repair returned to the used instrument stock / pool.

Note1: Actual repair times and all spare parts / consumables used for the workshop repair should be recorded against this code.

Note2: Repair viability inspection and post repair quality assurance check times are not to be recorded with this code, any such activities should be recorded under codes W10 and W11 respectively.

Note3: Please note that no activities described as “fully refurbishing” in the divisional Q-Standard “Repair and full refurbishment of used instruments to be placed back on the market” are not allowed in the country service organizations and should not be reported against this code (please see a list of divisional Q-Standards on the Global QM homepage)

W03	WS Instrument retrofit	Retrofit of used instrument returned from the field and returned to customer site
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Code W03, Instrument retrofit, to be used exclusively by the workshop personal to record the workshop retrofit of an instrument returned from a customer site and after retrofit returned back to the customer site.

Note1: This code should also be used where workshop retrofit of affiliate own stock is required.

Note2: Actual retrofit times and all spare parts / consumables used for the workshop retrofit should be recorded against this code.

Note3: Retrofit viability inspection and post retrofit quality assurance check times are not to be recorded with this code, any such activities should be recorded under codes W10 and W11 respectively.

W04	WS PCB / Module repair	Repair & COC of PCB / Module returned from field
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Code W04, PCB / Module repair, to be used exclusively by the workshop personal to record the workshop repair of a PCB or module returned from the field for repair and to be returned to stock after repair and COC (Certificate of Conformity) inspection.

Note1: Actual repair times and all parts used for the workshop repair should be recorded against this code.

Note2: Repair viability inspection and COC inspection times are not to be recorded with this code, any such activities should be recorded under codes W10 and W11 respectively.

W07	WS New instrument prep	Preparation / pre-installation check of new instrument prior to delivery to customer
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Code W07, New instrument prep, to be used exclusively by the workshop personal to record the workshop activities for the preparation or pre-installation check of a new instrument before delivery to the customer site.

Note1: Actual preparation times, together with all spare parts / consumables used for the workshop new instrument preparation should be recorded against this code.

Note2: New instrument quality assurance check times are not to be recorded with this code; any such activities should be recorded under code W11

W08	WS New PCB / Module prep	Preparation / pre-installation check of new / COC part prior to delivery to field engineer / customer
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Code W08, New PCB / Module prep, to be used exclusively by the workshop personal to record the workshop activities for the preparation or pre-installation check of a new or previously COC (Certificate of Conformity) PCB or module, prior to delivery to a Roche engineer or customer engineer.

Note1: Actual preparation times, together with all spare parts / consumables used for the workshop new PCB / module preparation should be recorded against this code.

Note2: New PCB / module quality assurance check times are not to be recorded with this code, any such activities should be recorded under code W11

W09	WS Demo instrument prep	Preparation / performance testing of instrument prior to sales demonstration
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Code W09, Demo instrument prep, to be used exclusively by the workshop personal to record the workshop activities associated with the preparation, cleaning, programming etc, of a demonstration instrument prior to delivery to the customer site or exhibition.

Note1: Actual preparation times, together with all spare parts / consumables used for the demo instrument preparation should be recorded against this code.

W10	WS Instrument pre-repair inspection	Goods in inspection prior to starting workshop repair / refurbish / retrofit actions
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Code W10, Instrument pre repair inspection, to be used exclusively by the workshop personal to record the goods in-inspection for repair, refurbish or retrofit viability of a returned instrument, PCB or module.

Note1: Goods in inspection and repair viability times are to be recorded separately from the actual repair, refurbish, and retrofit times.

W11	WS Quality assurance check	Time spent ensuring correct operation / function of repaired / refurbished / retrofitted instrument / PCB or module
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Code W11, Quality assurance check, to be used exclusively by the workshop personal to record the time spent carrying out performance verification checks and or COC (Certificate of Conformity) checks on new, repaired or retrofitted instruments, PCB's and modules.

Note1: Quality assurance check times are to be recorded separately from the actual repair, refurbish, and retrofit times.

Note2: COC Certificate of Conformity for an instrument refurbishment, can only be issued by a certified refurbishment centre.

W12	WS OEM part pool repair	Repair & COC of Generic host system parts or modules, together with the repair of other OEM products
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Code W12 WS OEM part pool repair, to be used exclusively by the workshop personal to record time and parts used when repairing OEM (Other Equipment Manufactures) products, typically this would be UPS, water treatment units, printers etc.

Note1: The workshop repair of generic host system components e.g. PC's video barcode readers, etc should also be recorded under this code

W13	Instrument re-certification CU Center	Re-certification of used instrument returned from the field (CU site rework)
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Code W13 Instrument re-certification CU Center, to be used exclusively by a certified used center to record time and parts used for a re-certification of an used instrument returned from the field.

Note1: At the moment certified used centers are only in Spain, Switzerland and USA. Please note that only these CU centers are allowed to use this code.

Note2: For instrument re-certification the published SOPs should be followed.

Z00	Please Specify	Default
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Code Z00, Please specify, This code must not be used! It is only available as a default code prior to the selection of the actual activity code.

Note1: In exceptional circumstances, e.g. where the activity undertaken was unable to be assigned to a Service Activity Code, the event should be recorded and forwarded to the local member of the DMT for the appropriate change request

Z11	Support by Phone	Phone Time
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Code Z11, Support by Phone, to be used by the call centre operator, engineering, application specialist or field engineer to record phone activity times.

Note1: This code should be used regardless whether this phone support has fixed the problem or not.

Z12	Tele/Remote Diag	Remote Connection time
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Code Z12, Tele/ remote diagnostic, to be used by the call centre operator, engineering, application specialist or field engineer to record remote connection activity times.

Note1: This code should be used regardless whether this tele / remote support has fixed the problem or not.

Z21	ServVisit Em'cy	On-site technical correcting, un-planned
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Code Z21 ServVisit Em'cy, to be used by the visiting service specialist to record an emergency service visit, specifically an unplanned service visit initiated by the customer or customer representative.

Note1: Service visit emergency would typically be used to denote a serious problem with the instrument e.g. inability to perform an analysis, giving incorrect results or where the instrument is indicating that a serious problem is imminent.

Note2: Service visit emergency is used to calculate mean time between repair visits and as such is a critical indicator of instrument quality. Where more than one service specialist attends only the primary service specialist records the call as Service visit emergency, supporting service specialists record the visit as Z23 service visit assist.

Note3: Continued or repeat service visits must not be recorded as Service visit emergency; any such activities should be recorded under codes Z24 and Z25 respectively.

Note4: Service visits caused by consumables or wear parts must not be recorded as Service visit emergency; any such activities should be recorded under code Z26 respectively.

Z22	ServVisit NonEm'cy	On-site technical correcting planned
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Code Z22, ServVisit NonEm'cy, to be used by the visiting service specialist to record a Non-emergency service visit, specifically a planned service visit, usually initiated by customer or customer representative, but possibly initiated by the service specialist as a follow up visit.

Note1: Service visit Non-emergency would typically be used to denote problems that do not seriously affect the performance of the instrument, e.g. poor print quality, noise from cooling fans, keyboard, display problems, leaks etc.

Note2: Service visit Non-emergency is used to calculate mean time between repair visits and as such is a critical indicator of instrument quality, where more than one service specialist attends only the primary service specialist records the call as Service visit Non-emergency, supporting service specialists record the visit as service visit assist.

Note3: Continued or repeat service visits must not be recorded as Service visit Non-emergency, any such activities should be recorded under codes Z24 and Z25 respectively.

Note4: Service visits caused by consumables or wear parts must not be recorded as Service visit Non-emergency; any such activities should be recorded under code Z26 respectively.

Z23	ServVisit Assist	Giving on-site technical assistance to a colleague.
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Code Z23, ServVisit Assist, to be used by a supporting engineer or application specialist to indicate assistance given to the primary visiting service specialist, typically this would be where assistance is required to lift or move a large instrument or module or where the visit is time critical or where a engineer / application specialist team approach is deemed necessary.

Note1: Service visit assist will not be recorded as a visit for the MTBRV calculation, but all parts and hours recorded by the assisting service specialist will be included in the cost and statistical (Mean time for) calculations for the visit.

Note2: Service visit assist should not be used when the accompanying engineer or application specialist is under training, such activities should be recorded under code Z88 Support Training.

Z24	ServVisit Cont'd	Continuation of a Support Visit on another day
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Code Z24, ServVisit Cont'd, to be used to indicate that the service visit was carried over a second / subsequent days, typically this would be where the visit extended past normal working hours, or where the customer requested a temporary delay in the repair visit and a return of the instrument in order to complete the days work-load.

Note1: Service visit continued will not be recorded as a visit for the MTBRV calculation, but all parts and hours recorded on the second or subsequent visits will be included in the cost and statistical (Mean time for) calculations of the original visit

Z25	ServVisit Repeat	Consecutive visit for repairing the same instrument within 5 working days
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Code Z25, ServVisit Repeat, used to record a second or subsequent service visit taking place within 5 working days of completion of the original service visit, where the customer reports identical or similar failure symptoms for the same instrument.

Note1: Service visit Repeat will not be recorded as a visit for the MTBRV calculation, but all parts and hours recorded on the second or subsequent visits will be included in the cost and statistical (Mean time for) calculations of the original visit.

Z26	ServVisit Intervention	On-site technical correcting caused by wear parts like ISE, electrodes, needles, etc. or caused by handling errors
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Code Z26 ServVisit Intervention, to be used by the visiting engineer / application specialist to record an on-site visit caused by wear parts like ISE, electrodes, needles etc. or caused by handling errors.

Note1: Service visit Intervention would typically be used for visits which are not caused by instrument HW/SW quality problems itself (e.g. mechanical or electronical failures) but by consumables or wear parts which require replacing occasionally or visits caused by customer/user handling errors.

Note2: Service visit Intervention is not used to calculate mean time between repair visits as the root cause for these visits aren't any instrument quality issues.
Service visit Intervention is used to calculate mean time between application visits

Z29	Cancelled Call	Cancelled upon arrival at customer's site - no support work done
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Code Z29 Cancelled Call, to be used to record a dispatched / arranged visit to a customer site, which was subsequently cancelled by the customer when the visiting engineer or application specialist is either on route or has actually arrived at the customer site.

Note1: Cancelled call will not appear in any quality or cost statistic, but travel and labour hours will be recorded both, under all activity and Activity code Z29.

Z30	ApplVisit Em'cy	On-site error correcting: = Support Visit Unplanned
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Code Z30 ApplVisit Em'cy, to be used by the visiting service specialist to record an emergency application visit, specifically an unplanned application visit initiated by the customer or customer representative.

Note1: Application Visit emergency would typically be used to denote a serious application problem with a Roche supplied application product or instrument e.g. inability to perform the analysis, or where serious imprecision or inaccuracy of results are suspected.

Note2: Application visit emergency is used to calculate mean time between application visits and as such is a critical indicator of application quality, where more than one service specialist or Roche representative attends, only the primary service specialist records the call as application visit emergency, supporting personnel record the visit as application visit assist.

Note3: Continued or repeat application visits must not be recorded as application visit emergency, any such activities should be recorded under codes Z33 and Z34 respectively

Z31	ApplVisit NonEm'cy	On-site application correcting planned
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Code Z31, ApplVisit NonEm'cy, to be used by the visiting service specialist to record a Non-emergency application visit, specifically a planned application visit, usually initiated by the customer or customer representative but possibly initiated by the service specialist as a follow up or method development / investigation visit.

Note1: Application Visit Non-emergency would typically be used to denote a less-serious application problem with a Roche supplied application product or instrument, where the visit objective is to demonstrate / investigate or implement new methods or new TASU³ or other updated test definition parameters.

Note2: Application visit Non-emergency is used to calculate mean time between application visits and as such is a critical indicator of application quality, where more than one service specialist attends only the primary service specialist records the call as application visit Non-emergency, supporting personnel record the visit as application visit assist.

Note3: Repeat or continued Application visits must not be recorded as Application visit Non-emergency, any such activities should be recorded under codes Z33 and Z34 respectively

Note4: Please note that installation of applications on a newly installed instrument should not be reported as an ApplVisit NonEm'cy, these activities should be recorded under Z77.

³ TASU: test application settings, update

Z32	ApplVisit Assist	On-site application correcting (time independent)
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Code Z32, ApplVisit Assist, to be used by a supporting engineer or application / software specialist to indicate assistance given to the primary visiting service specialist, typically this would be where assistance is required to adjust the instrument hardware, reprogram / reload software or where assistance may be required with a specific methodology problem.

Note1: Application visit assist will not be recorded as a visit for the MTBAV calculation, but all parts kits, and hours recorded by the assisting specialist will be included in the cost and statistical (Mean time for) calculations for the visit.

Note2: Application visit assist should not be used when the accompanying engineer or application specialist is under training, such activities should be recorded under code Z88 Support Training.

Z33	ApplVisit Cont'd	Continuation of an application Visit on another day
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Code Z33, ApplVisit Cont'd, to be used to indicate that the application visit was carried over a second / subsequent days, typically this would be where the visit extended past normal working hours, or where the customer requested a temporary delay in the application visit and a return of the instrument in order to complete the days work-load.

Note1: Application visit continued will not be recorded as a visit for the MTBAV calculation, but all parts, kits and hours recorded on the second or subsequent visits will be included in the cost and statistical (Mean time for) calculations of the original visit.

Z34	ApplVisit Repeat	Consecutive application visit the same instrument within 5 working days
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Code Z34 ApplVisit Repeat, used to record a second or subsequent application visit taking place within 5 working days of completion of the original application visit, where the customer reports identical or similar failure symptoms for the same application.

Note1: Application visit Repeat will not be recorded as a visit for the MTBAV calculation, but all parts, kits and hours recorded on the second or subsequent visits will be included in the cost calculations of the original visit.

Z41	PM Visit	Preventive Maintenance work
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Code Z41, PM Visit, to be used by the visiting engineer to record the completion of a planned preventative maintenance visit.

Note1: PM visit is used to calculate mean time between preventative maintenance visits (MTBMV) and as such is a critical indicator of maintenance quality, where more than one engineer or Roche representative attends, only the primary engineer records the call as preventative maintenance visit, supporting personnel record the visit as PM visit assist.

Note2: Preventative maintenance performed off the customer site e.g. at the engineers home base or workshop should also be recorded against this code

Note3: assist or continued preventative maintenance visits must not be recorded as preventative maintenance visit, any such activities should be recorded under codes Z42 and Z43 respectively

Z42	PM Visit Assist	Giving on-site PM assistance to a colleague
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Code Z42, PM Visit Assist, to be used by a supporting engineer to indicate assistance given to the primary visiting engineer, typically this would be where assistance is required to lift or move a large instrument or modules or where the PM visit is time critical or where a engineer team approach is deemed necessary.

Note1: PM visit assist will not be recorded as a visit for the MTBMV calculation, but all parts and hours recorded by the assisting engineer will be included in the cost and statistical calculations (Mean time for) calculations for the PM visit.

Note2: PM visit assist should not be used when the accompanying engineer is under training, such activities should be recorded under code Z88 Support Training.

Z43	PM Visit Cont'd	Continuation of a PM Visit on another day
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Code Z43, PM Visit Cont'd, to be used to indicate that the preventative maintenance visit was carried over a second / subsequent days, or where the customer requested a temporary delay in the PM visit and a return of the instrument in order to complete the days work-load.

Note1: PM visit continued will not be recorded as a visit for the MTBMV calculation, but all parts and hours recorded on the second or subsequent PM visits will be included in the cost and statistical calculations (Mean time for) calculations of the original visit

Z44	ApplVisit PM	Preventive maintenance activities in the application area
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Code Z44, ApplVisit PM, to be used by the visiting application specialist to record preventive maintenance activities in the application area, typically this would be checking of calibration status or QC results, checking water quality etc.

Note1: This code should also be used for Roche initiated application-related PM visits when Roche has contractual liability to maintain up-time and operational readiness of the system (e.g. as part of a Leasing, Reagent Rental or Service contract or during Warranty periods).

Note 2: ApplVisit PM activities are neither counted to calculate Mean Time Between Application Visits (MTBAV) nor Mean Time Between Maintenance Visits (MTBMV, includes only instrument PM activities).

Z45	HW modification (mandatory)	Visit for carrying out a mandatory retrofit / modification / update of a system
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Code Z45, HW modification (mandatory), to be used to record the mandatory (quality driven) hardware retrofit, modification or update of a system, typically at the request of the manufacturer to improve product quality or reliability (e.g. via service bulletin).

Note1: Parts used during HW modification (mandatory) visits are normally supplied free of charge by the manufacturer, and as such are not included in the cost of the visit.

Note2: For mandatory software modifications; code A14 SW modification (mandatory) should be used.

Note3: Labour hours for mandatory HW modifications will be calculated in the cost of the visit.

Z46	HW modification (optional)	Visit for carrying out an update of a system (chargeable)
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Code Z46, HW modification (optional), to be used to record the updating or upgrading of a system, typically this would be at the request of the customer to improve the performance, specification or productivity of the instrument

Note1: Labour hours and parts used during optional HW modifications are chargeable and will be included in the cost of the visit

Note2: For optional software modifications code A16 SW modification (optional) should be used.

Z49	Parts Delivery / Management	Instrument related parts delivery - without any other service activity, except follow-up phone call
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Code Z49, Parts Delivery / Management, to be used to record time and parts needed to deliver material to a customer site without any other service activity. This could be delivering material to a colleague currently on site or sending material to a customer without carrying out a site visit.

Note1: Parts should only be recorded against this Service Activity Code when sending parts directly to the customer. When delivering material to a colleague currently at a customer visit the material must only be recorded in the customer visit report.

Note2: Please report spare part inventory activities also under this code (via User Time Log).

Z51	Valid'n/Accredit'n	Validation / accreditation of a system according to local rules
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Code Z51, Valid'n/Accredit'n, used to record a customer requested visit to a laboratory for the purposes of accrediting a system or instrument to local validation or accreditation rules, e.g. FDA approval.

Z61	Site Preparation visit	On-site Preparation visit without instrument serial number
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Code Z61, Site Preparation visit, used to record a site visit prior to instrument installation, typically this would be to assess laboratory access and site facilities e.g. power, water, ventilation etc.

Note1: Normally at the time of a site preparation visit the instrument serial number is not known. It is recommended to keep the case open until serial number information is available and then updating the case. In time critical cases entered dummy serial numbers should follow the global reporting convention format e.g. #?

Z62	Installation	Installation of an instrument / system
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Code Z62, Installation, to be used to record the installation of a instrument or system, typically this would include all tasks associated with the commissioning of the system, e.g. physically locating the system, connecting to facilities, system setup and performance verification checks. Please make sure to use this code only once during the installation phase of an instrument, see the following notes for codes to be used for additional installation activities.

- Note1: Customer on-site training should not be reported under the installation code, any such training should be recorded under either, A15 Initial customer training or under A06 Customer follow up training on site.
- Note2: Installation and Interfacing activities to the customer host LIM/LIS systems should not be recorded under this code, any such activities should be recorded under Z78 (when done during the installation of an instrument) or Z76 (for instruments already installed).
- Note3: assist or continued Installation visits must not be recorded as installation visits, any such activities should be recorded under codes Z73 and Z74 respectively.
- Note4: Installation of applications must not be recorded as installation visits, any such activities should be recorded under code Z77 respectively.

Z63	De-Inst/Removal	De-install / remove an instrument / system Including decontamination
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Code Z63, De- Inst/Removal, to be used to record the de-installation of a system or instrument from the customer site, typically this would include the de-commissioning, physical removal of the system and any associated accessories, together with compliance to local cleaning or decontamination protocols.

- Note1: Usage of this code is very important for a correct calculation of active instruments as this code is the only option to immediately remove an instrument from the active instrument base.
- Note2: Please note that other activities reported after usage of this code may switch the instrument back to “active” (e.g. WS Instrument repair).

Z64	Relocate System	Relocate a instrument / system to another room or site (same customer)
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Code Z64, Relocate System, to be used to record the physical relocation of a system or instrument within the customer site, typically this would include the dismantling and re-commissioning of the instrument together with system set up and performance verification checks.

Z73	Installation Assist	Giving on-site Installation assistance to a colleague
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Code Z73 Installation Assist, to be used by a supporting engineer or application specialist to indicate assistance given to the primary installing service specialist, typically this would be where assistance is required to lift or move a large instrument or where the installation time is lengthy or where a engineer / application specialist team approach is deemed necessary.

Note1: All parts and hours recorded by the assisting service specialist will be included in the cost and statistical calculations (Mean time for) of the installation visit.

Note2: Installation assist should not be used when the accompanying engineer / application specialist is under training, such activities should be recorded under code Z88 Support Training.

Z74	Installation Cont'd	Continuation of Installation on another day
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Code Z74, Installation Cont'd, to be used to indicate that the Installation visit was carried over a second / subsequent days.

Note1: All parts and hours recorded on the second or subsequent installation visits will be included in the cost and statistical calculations (Mean time for) of the original installation visit

Z75	Installation completion	Visit to obtain customer acceptance
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Code Z75, Installation completion, to be used to record the formal acceptance of the installation by the customer, typically this would be the trigger point for customer invoicing.

Note1: Labour hours and parts recorded against this code will be included in installation costs or statistical calculations.

Z76	Host / Connection & installation	Technical actions associated with connecting instruments to LIM/LIS host system
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Code Z76, Host / Connection & Installation , to be used to record actions, labour hours and parts used associated with connection, support and interfacing of Roche supplied instruments to the customer's laboratory host LIM/LIS system.

Note1: This code only has to be used when interfacing an already installed instrument to a new LIM/LIS system. Interfacing activities during the installation phase of an instrument have to be reported against code Z78 (Install new host connection)..

Z77	Install applications	Installation of applications on a newly installed instrument
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Code Z77, Install applications, to be used by the service specialist to record actions, labour hours and parts used associated with installation of applications on a newly installed instrument.

Note1: Labour hours and parts recorded against this code will be included in installation costs or statistical calculations (Mean time for).

Note2: Installation of additional applications for an instrument already in use at the customers site should be recorded as an ApplVisit NonEm'cy (Z31).

Z78	Install new host connection	Connecting a newly installed instrument to LIM/LIS host systems
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Code Z78, Host / Connection & Installation , to be used to record actions, labour hours and parts used associated with connection, support and interfacing of a newly installed instrument to the customer's laboratory host LIM/LIS system.

Note1: Labour hours and parts recorded against this code will be included in installation costs or statistical calculations (Mean time for).

Note2: Interfacing activities for an instrument already in use at the customers site should be recorded against code Z76 (Host / Connection & installation).

Z79	Routine Start / Go-Live	Visit to indicate that the instrument is now running in routine mode
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Code Z79, Routine Start / Go-Live, to be used to record the point in time when the instrument starts running in routine mode, e.g. after all correlation work, etc. is done.

Note1: Labour hours and parts recorded against this code will be included in installation costs or statistical calculations (Mean time for).

Z82	Courtesy Visit	Visit by FSR for no specific technical / application reason or unscheduled technical check (foc)
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Code Z82, Courtesy visit, used to record a customer visit by an engineer or application specialist for non-engineering or technical reasons, typically this would be to maintain professional and friendly relations with the customer and laboratory staff.

Note1: if a request for repair or application actions results from the courtesy visit such actions should be reported against the appropriate service activity code.

Z83	Sales Assistance	Assisting sales & marketing related activities such as: demo, shows, evaluation
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Code Z83, Sales Assistance, used to record labour hours, parts, parts CC, etc used when supporting sales and marketing activities, typically this would be at laboratory demonstrations, product evaluation or formal exhibitions.

Note1: Instrument or system failures that occur during a sales assistance visit should be reported against the appropriate service activity code.

Z84	Laboratory organisation consulting	Actions associated with lab work flow optimisation
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Code Z84, Laboratory organisation consulting, used to report activities associated with laboratory organisation; typically this would entail developing customer specific work-flow optimisation and systems utilisation plans, together with their on-site implementation and support.

Z85	Customer IT SW configuration	Actions associated with configuration of Customer IT tools
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Code Z85, Customer IT SW configuration, to be used to report activities associated with configuration of Customer IT tools, typically this would entail connection of different instruments or implementation and support of systems utilisation plans.

Z86	Peripheral Hardware visit	Technical actions including installation associated with peripherals e.g. Printers, UPS, water supply systems
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Code Z86, Peripheral Hardware visit, used to record engineering or application visits where the main cause of the failure was an external, instrument related peripheral, typically this would be where a water supply is contaminated or an external printer connection is not made.

Note1: Visits recorded as Peripheral hardware visits are not included in Mean Time Between Repair /Application visits, and as such it is critical to instrument performance statistics that peripheral failures are not included in these calculations.

Z88	Support Training	Reporting on completed training off support staff
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Code Z88, Support Training, to be used to report all service / application activity when the trainee is attending customer sites under the supervision of an experienced engineer or application specialist.

Note1: All labour hours recorded under support training will not be included in any Mean Time For statistics

Note2: Spare parts, test kits etc used by the trainee during a visit should be recorded against the visit and will be calculated in the visit costs.

Note3: This code can be used for product related trainings as well as for any other training done to gain the needed know-how for the entire service process (e.g. Clarify, GRIPS, etc.)

Z90	Pre-Marketing/Design	Assisting R&D for pre-marketing related activities, e.g. design input roundtables or workshops, customer shows, evaluations
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Code Z90, Pre-Marketing/Design, to be used to record labour hours when supporting R&D for pre-marketing activities, typically this would be at workshops for design input, customer demonstrations, product pre-marketing evaluation, formal exhibitions, etc.

Z91	Admin. /Office	
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Code Z91 Admin / Office, to be used to record all non-customer related administration tasks, typically this would be preparation / organisation of support materials, manuals and literature, preparation of expenses reports etc.

Note1: Admin / Office should not be used to complete customer visit reports, field service reports etc, this time is seen as an integral part of the actual customer visit and as such should be included in the Mean Time For calculations.

Note2: All spare parts management activities should be reported under code Z49 Parts Delivery / Management

Z97	Empty Field	for internal data processing, not to be used in Clarify
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Code Z97 Empty Field. This code should neither be used nor seen in Clarify. It is only needed for internal data processing.

A Service Activity Code will be set to Z97 Empty Field if the respective code field does not contain any information.

Z98	Not Global	for internal data processing, not to be used in Clarify
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Code Z98 Not Global. This code should neither be used nor seen in Clarify. It is only needed for internal data processing.

A Service Activity Code will be set to Z98 Not Global if the coded information received is not available in the list of global codes.