

Step Bypass & Credit Operations

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Step Bypass & Credit Operations

Overview

The purpose of this feature is to give laboratory management the ability to bypass steps on any specific case for a variety of reasons. They may want to bypass certain steps so that a case can “catch up” to where it should be in production, or they may have determined that previously scheduled steps are now “unnecessary” on a specific case. This feature also gives management the ability to credit technicians for completing bypassed steps, for payroll or tracking purposes.

There are three “Bypass/Credit” forms that are accessible from three different points within the data application. This allows for security settings to limit the bypass and crediting functionality for some users, but allow full functionality for other users. The forms are accessible as follows:

1. In the **Cases** menu, the form is called **Bypass Steps**. In this form, steps can be bypassed but not credited. A user may bypass one or more steps on a case. The step status will become “Bypassed,” with no technician credits.
2. In the **Management** menu, the form is called **Bypass/Credit**. In this form, steps can be bypassed *and* credited. For steps to be credited, a technician may be assigned or re-assigned. Any steps without the “Credit” flag selected will have a status of “Bypassed” with no technician credits. Any steps with the “Credit” flag will have a status of “Complete” and the defined, or selected, tech will receive credit.
3. In the **A/R** menu, the form is also called **Bypass/Credit**. This form has exactly the same functionality as the one in the Management menu, but users may also assign technicians and give credit for steps that were *previously* bypassed. This is the **only** place in the **Evolution** system where an operator may credit previously bypassed steps.

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Bypass Steps from Cases Menu

From the **Cases** menu choose **Bypass Steps** to access the “Bypass Steps” form:

1. Enter the case number and click **Select**. All uncompleted steps on the case are displayed:

The screenshot shows the 'Bypass Steps' form for Case: 2017-81. A red arrow points to the 'Select' button. Below the button is a table titled 'Uncompleted Steps' with columns 'Step' and 'Tech'. The table lists several steps, with 'Prep Die' selected. To the right of the table is a text box that says 'To bypass steps, select the step that is to be set to the ready step.' At the bottom of the form is an 'Apply Changes' button.

Step	Tech
Prep Die	Die Prep Technician
CAD Design	To Be Assigned
Milling	To Be Assigned
Sinter	To Be Assigned
CAD Finish	To Be Assigned
Stain & Glaze	Sue Harbin
Quality Control (C&B)	Ronald Kensington
Invoice Case	Cindy Moore
Shipping	Caroline Trip

2. Use your mouse to select the next step you want set to “Ready”. All steps *prior to* the selected step will be bypassed. Select **Apply Changes**:

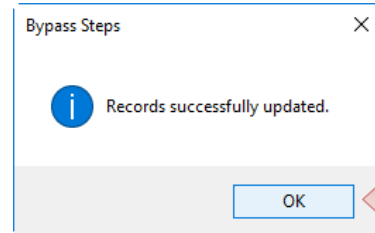
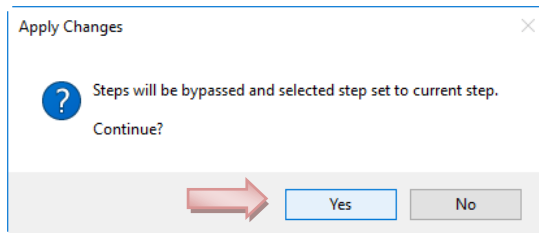
The screenshot shows the 'Bypass Steps' form for Case: 2017-81. A red arrow points to the 'Milling' row in the 'Uncompleted Steps' table. Another red arrow points to the 'Apply Changes' button at the bottom. The 'Select' button is now disabled.

Step	Tech
Prep Die	Die Prep Technician
CAD Design	To Be Assigned
Milling	To Be Assigned
Sinter	To Be Assigned
CAD Finish	To Be Assigned
Stain & Glaze	Sue Harbin
Quality Control (C&B)	Ronald Kensington
Invoice Case	Cindy Moore
Shipping	Caroline Trip

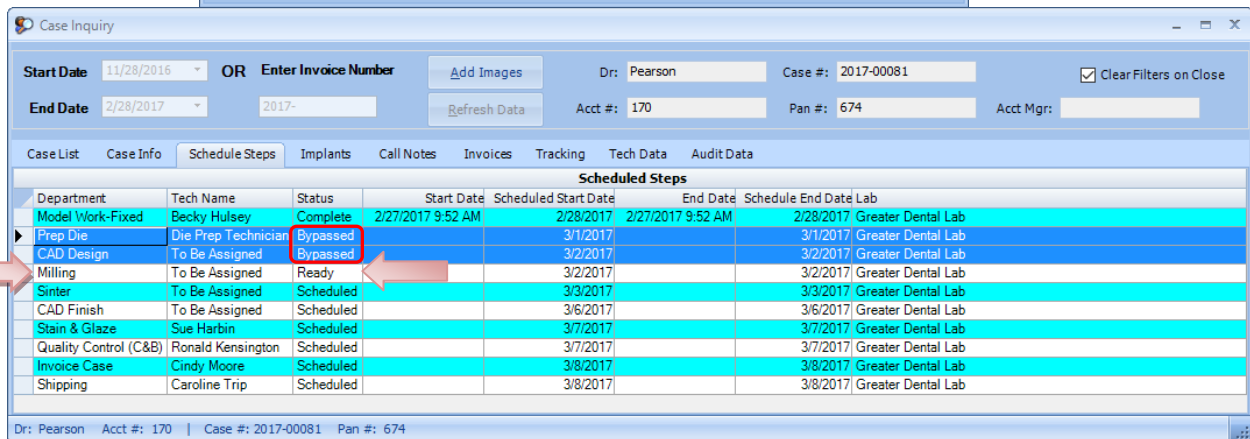
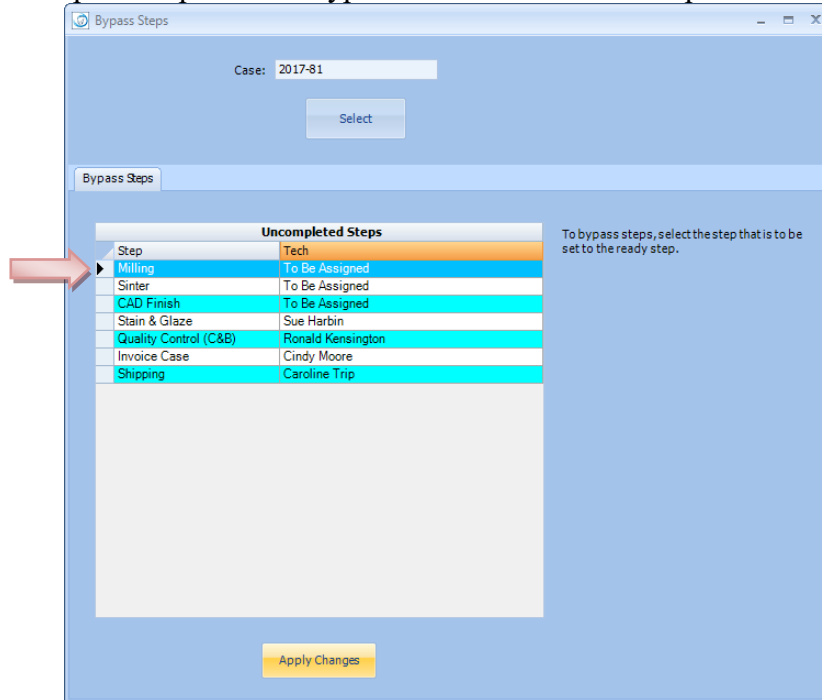
If the first step on the data grid is selected, the system will alert the user that the step is the “current production step” and that “No steps will be bypassed.”

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- The system will prompt you to confirm the change. Select **Yes** to continue, and then select **Ok**.



- The prior steps will be bypassed and the selected step will now be “Ready.”



Step Bypass & Credit Operations

Bypass/Credit from Management Menu

From the **Management** menu choose **Bypass/Credit** to open the “Bypass\Credit Steps” form:

1. Enter the case number and click **Select**. All uncompleted steps on the case are displayed.

The screenshot shows the 'Bypass\Credit Steps' window. At the top, there is a text field labeled 'Case:' containing '2017-77' and a yellow 'Select' button. Below this is a tabbed interface with the 'Bypass\Credit Steps' tab selected. The main area contains a table titled 'Uncompleted Steps' with three columns: 'Step', 'Tech', and 'Credit'. The table lists several steps, each with a technician assigned and a 'Credit' checkbox. To the right of the table, there are two instructional text blocks: 'To bypass steps, select the step that is to be set to the ready step.' and 'To credit a technician with a step, click on the steps checkbox and verify a technician has been selected for all steps to be credited.'

Step	Tech	Credit
Prep Die	Die Prep Technician	☐
CAD Design	To Be Assigned	☐
Milling	To Be Assigned	☐
Sinter	To Be Assigned	☐
CAD Finish	To Be Assigned	☐
Stain & Glaze	Cindy Moore	☐
Quality Control (C&B)	Larry Broome	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

2. Use your mouse to select the next step you want set to “Ready”. All steps *prior to* the selected step will be bypassed, unless you *also* select the “Credit” checkbox for a step. You may choose to give credit to all bypassed steps or only selected ones.

This screenshot shows the same 'Bypass\Credit Steps' window after the 'CAD Design' step has been selected. A red arrow points to the 'CAD Design' row in the 'Uncompleted Steps' table, which is now highlighted. The 'Credit' checkbox for 'CAD Design' is still unchecked. The 'Apply Changes' button at the bottom is now yellow. The instructional text on the right remains the same.

Step	Tech	Credit
Prep Die	Die Prep Technician	☐
CAD Design	To Be Assigned	☐
Milling	To Be Assigned	☐
Sinter	To Be Assigned	☐
CAD Finish	To Be Assigned	☐
Stain & Glaze	Cindy Moore	☐
Quality Control (C&B)	Larry Broome	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

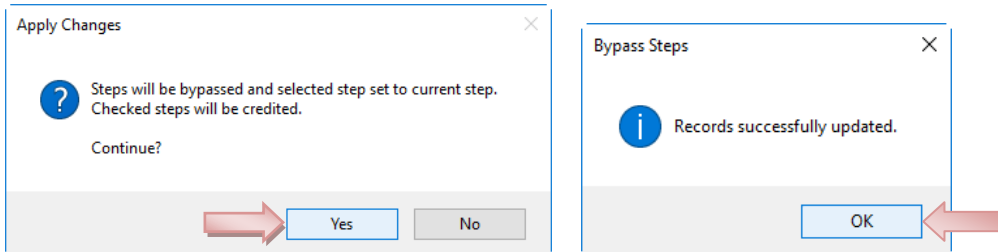
Step Bypass & Credit Operations

- On this form, you may also assign or reassign technicians to specific steps. If the **Tech** field for any given step displays “To Be Assigned” and you want to give credit, you *must* select a technician. Click **Apply Changes** after making all necessary selections:

Uncompleted Steps		
Step	Tech	Credit
Prep Die	Die Prep Technician	☒
CAD Design	To Be Assigned	☐
Milling	To Be Assigned	☐
Sinter	To Be Assigned	☐
CAD Finish	To Be Assigned	☐
Stain & Glaze	Cindy Moore	☐
Quality Control (C&B)	Larry Broome	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

Uncompleted Steps		
Step	Tech	Credit
Prep Die	Die Prep Technician	☒
CAD Design	Becky Hulsey	☐
Milling	Becky Little	☐
Sinter	Beverly Jones	☐
CAD Finish	Caroline Trip	☐
Stain & Glaze	Chris Cross	☐
Quality Control (C&B)	Cindy Moore	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

- The system will prompt you to confirm the change. Click **Yes** to continue, and then click **Ok**:



- The prior steps will be bypassed or completed and the selected step will now be “Ready.”

Bypass\Credit Steps

Case: 2017-77

Select

Bypass\Credit Steps

Uncompleted Steps		
Step	Tech	Credit
CAD Design	To Be Assigned	☐
Milling	To Be Assigned	☐
Sinter	To Be Assigned	☐
CAD Finish	To Be Assigned	☐
Stain & Glaze	Cindy Moore	☐
Quality Control (C&B)	Larry Broome	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

To bypass steps, select the step that is to be set to the ready step.

To credit a technician with a step, click on the steps checkbox and verify a technician has been selected for all steps to be credited.

Apply Changes

(cont.)

Step Bypass & Credit Operations

Case Inquiry

Start Date: 11/28/2016 OR Enter Invoice Number Add Images Dr: Ahmad Case #: 2017-00077 Clear Filters on Close

End Date: 2/28/2017 2017- Refresh Data Acct #: 21094AHMADNA Pan #: 417 Acct Mgr: Barbara Knighton

Case List Case Info Schedule Steps Implants Call Notes Invoices Tracking Tech Data Audit Data

Department	Tech Name	Status	Start Date	Scheduled Start Date	End Date	Schedule End Date	Lab
Model Work-Fixed	Becky Hulsey	Complete	2/27/2017 9:52 AM	2/28/2017	2/27/2017 9:52 AM	2/28/2017	Greater Dental Lab
Prep Die	Die Prep Technician	Complete	2/28/2017 12:14 PM	3/1/2017	2/28/2017 12:14 PM	3/1/2017	Greater Dental Lab
CAD Design	To Be Assigned	Ready		3/2/2017		3/2/2017	Greater Dental Lab
Milling	To Be Assigned	Scheduled		3/2/2017		3/2/2017	Greater Dental Lab
Sinter	To Be Assigned	Scheduled		3/3/2017		3/3/2017	Greater Dental Lab
CAD Finish	To Be Assigned	Scheduled		3/6/2017		3/6/2017	Greater Dental Lab
Stain & Glaze	Cindy Moore	Scheduled		3/7/2017		3/7/2017	Greater Dental Lab
Quality Control (C&B)	Larry Broome	Scheduled		3/7/2017		3/7/2017	Greater Dental Lab
Invoice Case	Caroline Trip	Scheduled		3/8/2017		3/8/2017	Greater Dental Lab
Shipping	Caroline Trip	Scheduled		3/9/2017		3/9/2017	Greater Dental Lab

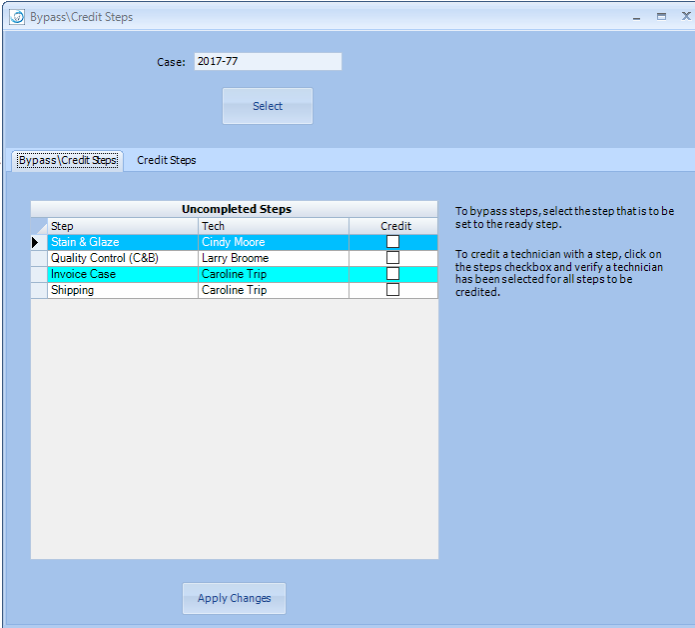
Dr: Ahmad Acct #: 21094AHMADNA | Case #: 2017-00077 Pan #: 417

Step Bypass & Credit Operations

Bypass/Credit from A/R Menu

From the **A/R** menu choose **Bypass/Credit** to open the “Bypass\Credit Steps” form:

1. Enter the case number and click **Select**. All uncompleted steps on the case are displayed on the **Bypass\Credit Steps** tab. This tab works *exactly* the same as the **Bypass/Credit** form opened from the **Management** menu. Please see the above instructions for assistance.



The screenshot shows the "Bypass\Credit Steps" form with the "Uncompleted Steps" tab selected. A red arrow points to the "Credit Steps" tab. The form displays a table of uncompleted steps for case 2017-77.

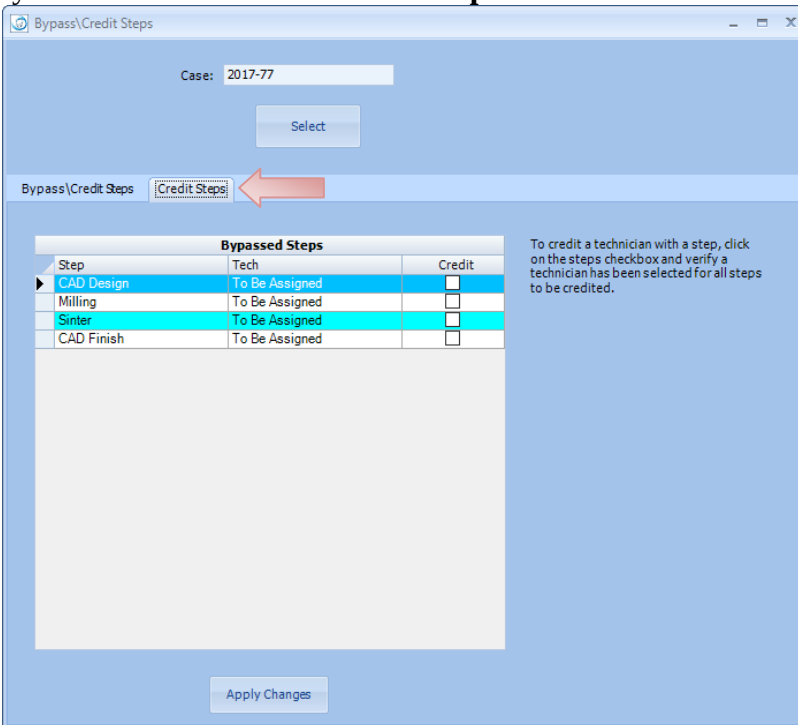
Step	Tech	Credit
Stain & Glaze	Cindy Moore	☐
Quality Control (C&B)	Larry Broome	☐
Invoice Case	Caroline Trip	☐
Shipping	Caroline Trip	☐

To bypass steps, select the step that is to be set to the ready step.

To credit a technician with a step, click on the steps checkbox and verify a technician has been selected for all steps to be credited.

Buttons: Select, Apply Changes

2. Use your mouse to select the **Credit Steps** tab:



The screenshot shows the "Bypass\Credit Steps" form with the "Credit Steps" tab selected. A red arrow points to the "Credit Steps" tab. The form displays a table of bypassed steps for case 2017-77.

Step	Tech	Credit
CAD Design	To Be Assigned	☐
Milling	To Be Assigned	☐
Sinter	To Be Assigned	☐
CAD Finish	To Be Assigned	☐

To credit a technician with a step, click on the steps checkbox and verify a technician has been selected for all steps to be credited.

Buttons: Select, Apply Changes

Step Bypass & Credit Operations

- Only steps with a status of “Bypassed” will show on this tab. This is the **only** place in the system when an operator can be given credit for steps that have been *previously* bypassed. This is the case regardless of *how* the steps were bypassed, whether during scheduling, rescheduling or bar coding, or through the use of another Bypass/Credit form.
- Flag the **Credit** checkbox for any step you want to credit. You may also assign or reassign technicians here. Click **Apply Changes** after making all necessary selections:

Case: 2017-77

Select

Bypass\Credit Steps Credit Steps

Step	Tech	Credit
CAD Design	Becky Little	☒
Milling	Bonni Davis	☒
Sinter	Beverly Gray	☒
CAD Finish	To Be Assigned	☒

To credit a technician with a step, click on the steps checkbox and verify a technician has been selected for all steps to be credited.

NOTE: This form will allow you to make selections on both tabs and then **Apply Changes** at one time. So, you can bypass steps on the first tab and credit those steps and also credit previously bypassed steps on this tab.

Apply Changes

- The system will prompt you to confirm the change. Click **Yes** to continue, and then click **Ok**:

Apply Changes

? Checked steps will be credited.
Continue?

Yes No

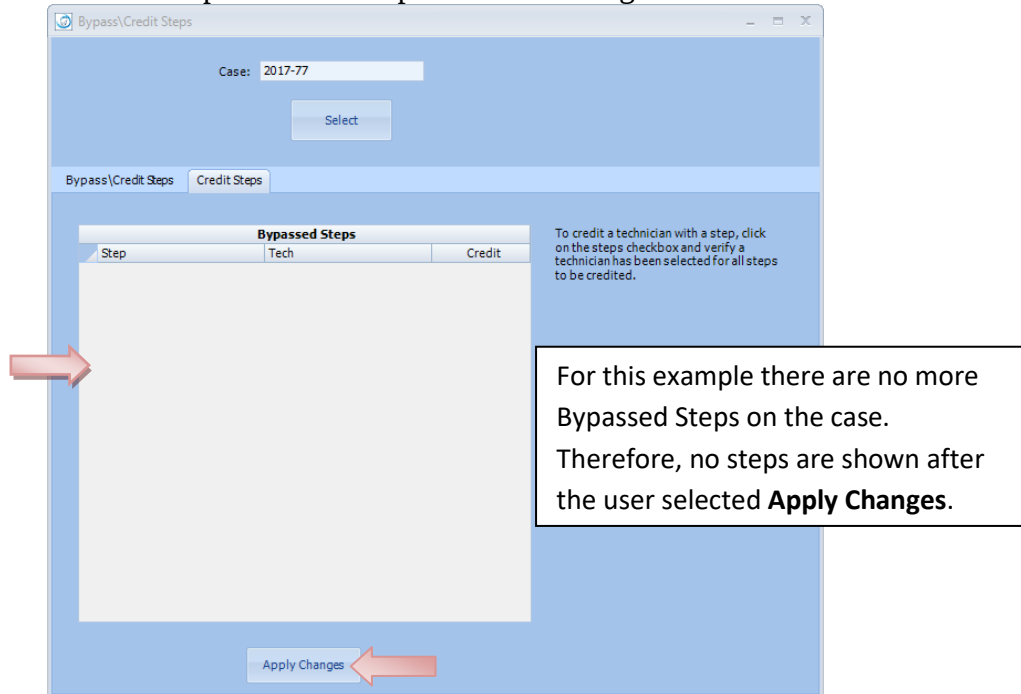
Credit Techs

i Records successfully updated.

OK

Step Bypass & Credit Operations

6. The selected steps will be Completed and credit given to the selected technicians.



Case Inquiry

Start Date: 11/28/2016 OR Enter Invoice Number Add Images Dr: Ahmad Case #: 2017-00077 Clear Filters on Close

End Date: 2/28/2017 2017- Refresh Data Acct #: 21094AHMADNA Pan #: 417 Acct Mgr: Barbara Knighton

Case List Case Info Schedule Steps Implants Call Notes Invoices Tracking Tech Data Audit Data

Scheduled Steps							
Department	Tech Name	Status	Start Date	Scheduled Start Date	End Date	Schedule End Date	Lab
Model Work-Fixed	Becky Hulsey	Complete	2/27/2017 9:52 AM	2/28/2017	2/27/2017 9:52 AM	2/28/2017	Greater Dental Lab
Prep Die	Die Prep Technician	Complete	2/28/2017 12:14 PM	3/1/2017	2/28/2017 12:14 PM	3/1/2017	Greater Dental Lab
CAD Design	Becky Little	Complete	2/28/2017 12:57 PM	3/2/2017	2/28/2017 12:57 PM	3/2/2017	Greater Dental Lab
Milling	Bonni Davis	Complete	2/28/2017 12:57 PM	3/2/2017	2/28/2017 12:57 PM	3/2/2017	Greater Dental Lab
Sinter	Beverly Gray	Complete	2/28/2017 12:57 PM	3/3/2017	2/28/2017 12:57 PM	3/3/2017	Greater Dental Lab
CAD Finish	Caroline Trip	Complete	2/28/2017 12:57 PM	3/6/2017	2/28/2017 12:57 PM	3/6/2017	Greater Dental Lab
Stain & Glaze	Cindy Moore	Ready		3/7/2017		3/7/2017	Greater Dental Lab
Quality Control (C&B)	Larry Broome	Scheduled		3/7/2017		3/7/2017	Greater Dental Lab
Invoice Case	Caroline Trip	Scheduled		3/8/2017		3/8/2017	Greater Dental Lab
Shipping	Caroline Trip	Scheduled		3/9/2017		3/9/2017	Greater Dental Lab

Dr: Ahmad Acct #: 21094AHMADNA Case #: 2017-00077 Pan #: 417