Tracking Customer Service using Customer Service Database in Microsoft Access

The purpose of this document is to provide guidance for logging information in the MS Access database.

As part of the Center for Veterinary Biologics Inspection and Compliance Section (CVB-IC), employees respond to calls from our regulated industry, adverse events reported by end users of veterinary biologics, and other members of the public. These contacts are recorded on the Customer Service Database:
[redacted]

The benefits of this customer service database are:

1. The CVB-IC can monitor resource trends;
2. Open/Transparent communication;
3. The user can document his/her input in customer service (part of evaluation standards);
4. User friendly way to use;
5. Access to lots of information that will assist in our daily functions.

The database has a switchboard that will serve as a quick link to desired information. This information is for information, not official policy. The Customer Service representative Tally, Frequency of Customers, and Resource Analysis links located in the switchboard will serve as a quick tally of these calls. The number of calls and time spent will be a part of the work load indicators each month. The Resource Analysis link provides an account of time used, per customer. The Greek letter Sigma (Σ) located on the Home Menu bar, will allow for the sum of the columns.

<u>How to Use:</u>

A. The customer service representative (Specialist, Biologics Compliance Inspector [BCI], Biologics Compliance Assistant [BCA], or Biologics Office Assistant [BOA]) will write down the following information to create a new record:

a) The date of the call;
b) The current time;
c) His/her name as the CVB-IC representative;
d) The contact - First and last name of the caller;
e) The licensed establishment name and establishment number when applicable;
f) The contact's telephone number with dashes;
g) The type of contract - See Responsibilities **Section B**;
h) The code and serial (if applicable). The large field next to product code (XXXX.XX) and serial number is filled automatically (when applicable);
i) The details as a summary for the purpose of the customer contact.

j) The **red flag** field is there to assist you in the event a topic requires specific and consistent guidance and should be reviewed for applicability during the data entry process. The Red Flag advisor sub-form will provide guidance upon selection. This guidance will be provided by Section Leaders. See **Section C**.
k) The time spent on issue - The minutes spent on the contact (including the time it takes to research the question and respond back);
l) Action/Conclusion - The action taken on the issue, if applicable;
m) Outcome - The result of the conversation;
n) File Location - The information used to file a printed phone log, such as Gen-Corr, Code Number, Personnel, and Blueprint Corr.

B. Types of Contacts must be used by the CVB representative. Customer Service calls are measured monthly into three categories: Regulated Industry, Adverse Event Reports and Other. It is highly encouraged to use the following types.

Regulated Industry – calls received from the licensed establishments or permittees:

a) Firm - General telephone calls from a regulated establishment or permittee calls;

b) 116.5 Notification - Reports indicating questions regarding purity, safety, potency, efficacy, or problems regarding the preparation, testing or distribution of a product;

c) Submission Question - Information regarding a submission made to CVB-IC. This could include Reprocess and Retest (R&R), Extension of Dating (EOD) requests, as well as questions about APHIS Form 2008s and reference slips;

d) Verbal Release Request - IC personnel providing a verbal release of a specific serial. This also includes notification of Conditional Releases

e) Serial Status - Status requests from the firm regarding a specific serial submitted for release;

f) Mail Issues - Sometimes there are issues regarding the overnight mail/courier service;

g) Exports/CLI - The customer is seeking information regarding the export requirements and policies of veterinary biologics

Adverse Event Reports

Adverse Events - Telephone calls from anyone reporting an adverse event or product defect (even if you do not fill out an AER report).

Other

a) NCIE - Telephone calls from customers seeking the travel, import or export of animals or animal products;

b) Non Biological Product - Customers seeking information about products not regulated by other government entities, such as FDA, EPA or CVM;

c) NVSL - Customers seeking results or submission information for diagnostics;

d) Reagents - Customers seeking information for the purchase of reagents;

e) General Information about CVB - The customer is seeking information related to CVB-IC functions (for example, how to license a product) and;

f) Freedom of Information Act (FOIA) - The customer is seeking information that is confidential business information and wants to know how to obtain it.

g) Miscellaneous - For information not related to CVB, IC or any of the above.

h) Veterinary Biologics Investigations

Document the pertinent information relayed on the call. Do not include any editorial comments, just what was discussed. The Customer Service Form can serve as the telephone log. If needed for the file room, print the selected record by using the Print Record button located in the Customer Service Form. Use the field File Location to indicate the area where it was filed (Gen-Corr, Product Corr, VBI, Personnel, etc.). See **Section G for printing instructions**.

C. Red Flags:

It is the duty of Section Leaders to determine if a Red Flag is needed for a specific topic. In order to manage this function the following must be completed:

a) In the ALL Tables Navigation Pane, magnify the Red Flag Advisor area and the Red Flag Items Area;

b) Open the Red Flag Items Table first and type a relevant term for the Red Flag. Examples such as AI Availability, Rabies Reference, Foot and Mouth Disease are appropriate;

c) Copy the typed Red Flag Item and paste the information in a new record using the Red Flag Field in the Red Flag Advisor Form. These records must be exact to be functional in the Customer Service Form.

d) The information to use as guidance in the Red Flag Advisor Form must be typed in the Information Field.

e) Add your name, First and Last.

f) Add the date the red flag was instituted.

Deleting a Red Flag

g) To delete a red flag, open the Red Flag Items Table. Select the record to be deleted. In the Records Area of the Tool Bar, click Delete.

h) Repeat the action in the Red Flag Advisor Form.

D. Finding Records:

Customer Service Entry Form

a) The easiest way to search for a record in the Customer Service Phone Log is by using the **Search** field at the bottom of the form. This feature allows you to search all records as you type the information;

b) Find Icon (Binoculars) - Click on the binoculars and type the information to be searched. Click the Find Next button or the Enter/Return key on your keyboard to continue with the next matching record.

E. Sort & Filter.

The Sort & Filter features were designed to focus on desired records rather than observing all of the data in the database.

<u>Customer Service Phone Log</u>

This is a custom report located in the Switchboard and it is labeled Customer Service Phone Log. (If the user chooses to filter records, it is important to remove filters after the work is complete.)

a) Select the desired field to filter. Click on the Tool Bar/ Sort & Filter area and select the Selection Icon (Filter with Lightning).

b) The use of a right click in any field will provide you with an assortment of options for sorting and filtering records. For instance:

1. The use of a right click in a date field will give you the option of sorting for this year, last year, last month, this month, etc.

2. The use of a right click in a field with text will give you the option to match the selected text, omit the selected text, select text that contains X, or text that does not contain X, etc.

c) If the user chooses to filter records, it is important to click on the Tool Bar/Toggle Filter Icon to remove the filter.

<u>Customer Service Phone Log</u>

a) Select the desired field to filter. Click on the Tool Bar/ Sort & Filter area and select the Selection Icon (Filter with Lightning).

b) A similar function can be achieved in the Customer Service Phone Log by selecting the desired field and right click for a selection.

F. Analyzing Data:

The Customer Service Database has a section in the Switchboard exclusively for reports. The following can be achieved with each report:

a) Accounting of totals - The Records Tool Bar has a Greek Letter Sigma (Σ) to account for totals. Selecting this tool will allow quantification of the columns that have numbers.

b) Sort & Filter - See **Section E**.

G. Printing Records:

a) The Customer Service Form has a Print Record button. Click this button to print preview the record that is currently displayed in the form. Click the button with printer icon to print the page.