

Customer Credit Request Form User Guide

This User Guide is applicable to FRM5219

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Introduction

Welcome to the credit request form user guide.

Please try to submit your credit requests on or before the 22nd of each month. When possible submit just one form for your site each month. Once a form has been submitted do not add any additional products to the request form. A new form will need to be downloaded each month.

Please note all credits must be claimed within 3 months of the product expiry date or within 3 months of the date of delivery/collection for transport claims.

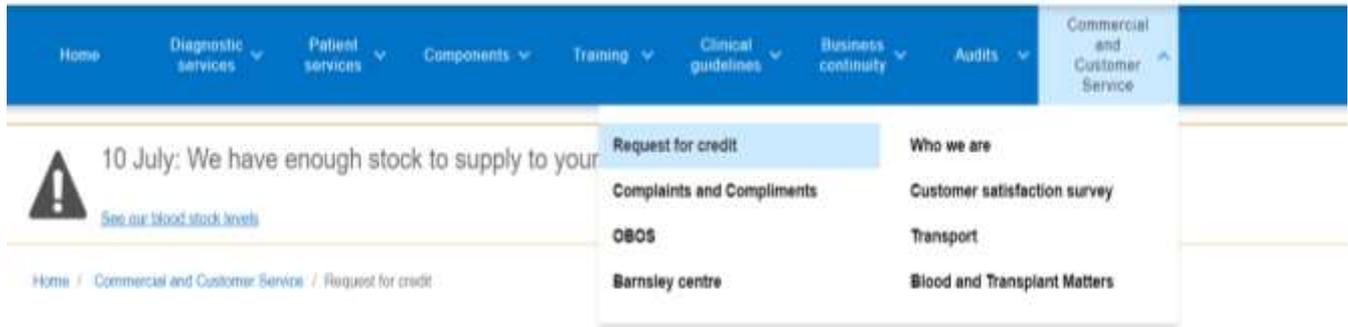
Claims for unutilised products (e.g. UAB) can only be made after the product expiry date and not prior. Additionally, please consider if any of your claims should be highlighted to NHSBT via your local customer service manager.

Credits can only be given to the hospital the components have been issued to. If components are transferred between hospitals NHSBT cannot credit the receiving hospital.

If you have any queries or feedback regarding the use of the credit form please contact your local Customer Service Manager or email nhsbtcustomerservice@nhsbt.nhs.uk

FRM5219

The form can be found on the Hospitals & Science website at the following location:



Making a request for credit

To make a request

Please use [FRM5219](#) (xls).

Please try to submit your request(s) on or before 22nd of each month.

Credit can only be applied to the individual hospital or trust where the components are issued to. If components are transferred between individual hospitals or trusts, we will not credit the receiving individual hospital or trust.

3 month time limit

Please be aware that there is a 3 month time limit to claim ALL credits.

This is either:

- from the date of expiry of the product

or, in the case of transport credits

- from the date of delivery / collection of the product

We recommend you submit requests on a monthly basis

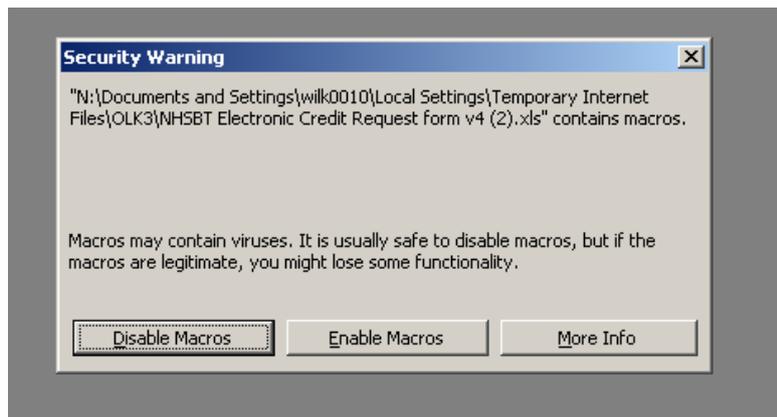
Submitting claims monthly will ensure they are not rejected because the 3 month time limit has been exceeded.

Getting Started

The form contains additional functions in the form of macros. Depending on the security settings on your system the first screen you may see is shown below.

You will be asked if you want to disable or enable macros.

Select 'Enable Macros'



Selecting either Enable or Disable takes you to the MACRO tab.

Enabling Macros

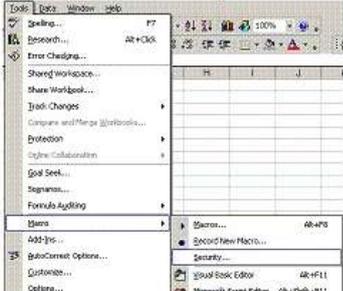
To use this credit form, you must ensure MACROS are ENABLED. The **MACRO tab** gives instructions on how to change settings using EXCEL 2000, and 2003, 2007, 2010 and 2013.

BLOOD AND COMPONENT CREDIT REQUEST FORM

To use this credit form, you must ensure **MACROS** are **ENABLED**. The below images show you how to enable macros in each version of excel. Follow the instructions provided, then click the 'DONE' button. If clicking the DONE button does nothing, then you have not enabled macros.

Enabling Macros in Excel 2000 and 2003:

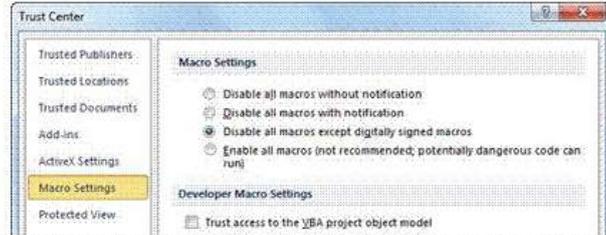
Navigate to the '**Tools**' tab, then click '**Macro**' and then '**Security**'. a Security window will then open.



choose '**Low Security**' from the options available. Click **OK**. You now need to **SAVE** the workbook, **Close** the workbook, and **re-open** it for the changes to take effect.

Enable Macros in Excel 2007:

With the excel file open, click on the '**Office**' button. Then click on '**Excel Options**' (present at the bottom). Next select the '**Trust Center**' > '**Trust Center Settings**'.



In the trust centre settings click on the '**Macro Settings**' and then choose '**Enable All Macros**'

Click **OK**, and **OK** again. You now need to **SAVE** the workbook **Close** the workbook, and **re-open** it for the changes to take effect.

MACRO / INSTRELEC / INSTRMAN / INSTRTRP / MAINPAGE / ELECTRONIC / MANUAL / TRANSPORT

Tabs Menu



There are several tabs within the form. These can be grouped into two sections:

- Instruction Tabs (Grey)
 - MACRO - How to change macro settings
 - INSTRELEC - Electronic entry
 - INSTRMAN - Manual entry
 - INSTRTRP - Transport section
- Data Entry Tabs (Red)
 - MAINPAGE - Your details
 - ELECTRONIC - Scan details on to form
 - MANUAL - Manual entry
 - TRANSPORT - For transport claims

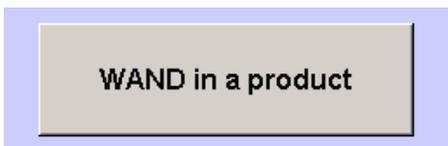
Data Entry

An instruction prompt box will appear when you click in one of the yellow boxes.

Once you have populated each yellow box select one of the following options.



Wand in a product



This option takes you directly to the ELECTRONIC tab allowing you to scan in the component details.

Please Note - Column A should be **your hospital**. If this is not **your hospital**, check the Pulse code used on the MAINPAGE.

	A	B	C	D	E	F
	Hospital name	ISBT Unit Number	Product	Expiry Date	Group	Returned
1						
2	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
3	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
4	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
5	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
6	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
7	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
8	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
9	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
10	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
11	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
12	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
13	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
14	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
15	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
16	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
17	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
18	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
19	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
20	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
21	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
22	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
23	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
24	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
25	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
26	Royal Devon and Exeter Hospital	#N/A	#N/A	#VALUE!	#VALUE!	
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Open Instructions for completing this form

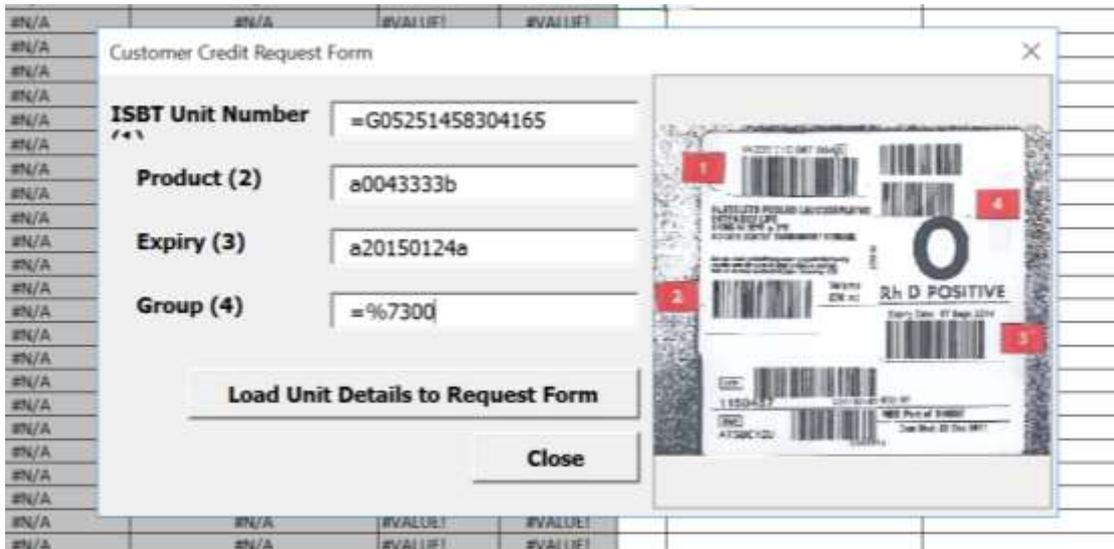
Return to MAINPAGE

Click **HERE** to Scan Units and Load Details to Credit Note

MACRO
INSTRELEC
INSTRMAN
INSTRTRP
MAINPAGE
ELECTRONIC
MANUAL
TRANSPORT

To start the credit request process please click on the box indicated.

The below pop up box will now appear.



Scan barcodes in order 1 to 4 as illustrated.

(Note - the alphanumeric format of the barcodes will look like the above, this is not an error)

If you scan an **incorrect barcode** a warning will highlight the error – see below. Click 'OK' and go back to the relevant box to re-scan the **correct barcode**.



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As with the Electronic System - the 'Returned' column indicates if you have returned the units back to NHSBT. Complete the 'CSM Informed' column to indicate if you have reported the claim to your local customer service manager. After choosing the most appropriate credit code, select a reason from the drop-down list in the 'Comments/Reason' column as to why you are making the credit claim. If 'Other' is selected, you will be contacted to provide further information. All of the above fields are mandatory.

Please note responses in drop down columns can be copied and pasted throughout the rest of the column e.g. for numerous claims for the same credit i.e. UAB.

Request TRANSPORT credit

Request TRANSPORT credit

This option takes you directly to the TRANSPORT entry tab for credit requests relating to Ad hoc, Collect or Emergency delivery charges.

Enter the Request No\Delivery Note Number into column B. The check box will auto populate highlighting any incorrect entries.

Select the most appropriate code from the drop-down list (ADH,COL,EMG) in the 'Credit Code' column (D).

Complete the 'CSM Informed' column (E) to indicate if you have reported the incident to your local customer service manager.

Select a reason from the drop-down list for your claim (column F). Please note if you select 'Other' you will be contacted to provide further information.

	A	B	C	D	E	F
	Hospital Name	Request No \ Delivery Note Number (9 Digits)	Check	Credit Code	CSM Informed	Comments/Reason
1	Royal Devon and Exeter Hospital	T00268931	TRANSPORT NUMBER OK	ADH	No	Order arrived on a routine run
2	Royal Devon and Exeter Hospital	00000000	ERROR, 9 CHARACTERS FOR REQUEST NUMBER	EMG	Yes	Order arrived on a routine run
3	Royal Devon and Exeter Hospital					Order collected with an ad hoc
4	Royal Devon and Exeter Hospital					Routine delivery requested
5	Royal Devon and Exeter Hospital					Other
6	Royal Devon and Exeter Hospital					
7	Royal Devon and Exeter Hospital					
8	Royal Devon and Exeter Hospital					
9	Royal Devon and Exeter Hospital					
10	Royal Devon and Exeter Hospital					
11	Royal Devon and Exeter Hospital					
12	Royal Devon and Exeter Hospital					
13	Royal Devon and Exeter Hospital					
14	Royal Devon and Exeter Hospital					
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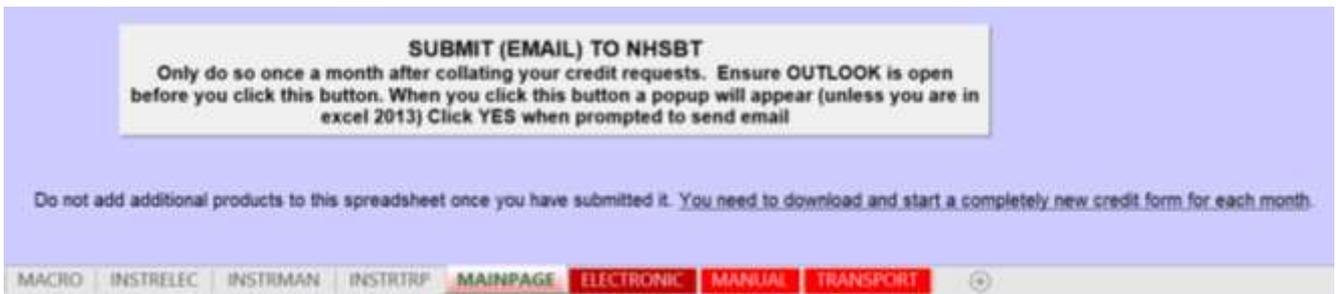
Open Instructions for completing this form Return to MAINPAGE

MACRO | INSTRLEEC | INSTRIMAN | INSTRTRIP | **MAINPAGE** | ELECTRONIC | MANUAL | **TRANSPORT**

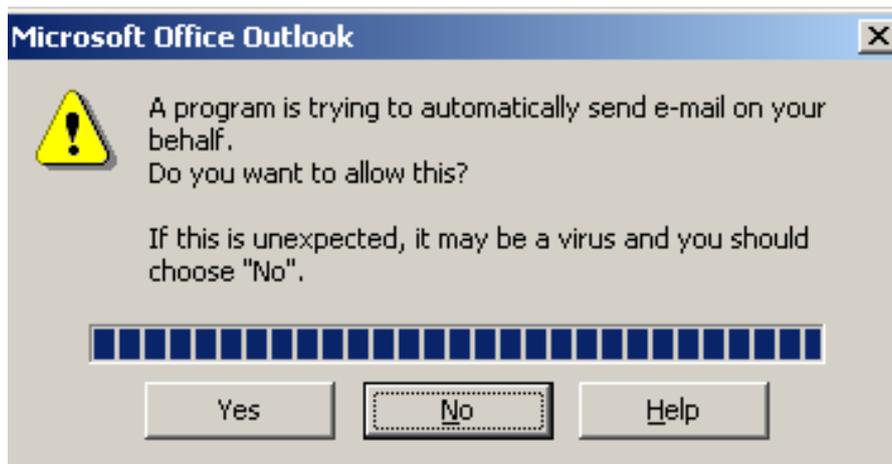
Request Submission

The form can be saved locally, populated over the month and ideally submitted on or before the 22nd of each calendar month.

When you are ready to submit your request go to the main page and select 'SUBMIT (EMAIL) TO NHSBT'.



This will automatically start the send process and depending on system settings you may be prompted to allow the process to complete as shown below. Please select 'YES'.



Below indicates a positive confirmation of a submission. A copy of the sent email will also go to your 'Sent Box'.



If the above facility to submit is unavailable then please send as an attachment to bloodcredits@nhsbt.nhs.uk

Credit Codes

Code	Description	When to use (examples)
ADH	Ad Hoc Charge	Ad hoc order arrived on a routine run. Two ad hoc requests were coloaded on to one ad hoc delivery.
COL	Collection Charge	Order was sent on a routine run instead of collected.
CMV	CMV Premium	To be used when a requested CMV negative unit cannot be utilised e.g. due to product damage.
DAC	Damaged Cryo	Visual abnormal or damaged Cryoprecipitate packs e.g. milky/lumpy cryoprecipitate.
DAF	Damaged FFP	Visual abnormal or damaged Fresh Frozen Plasma packs. e.g. split on thaw, discoloured.
DAP	Damaged Platelets	Visual abnormal or damaged Platelet packs e.g. red cell contamination, lipaemic.
DAR	Damaged RBC	Visual abnormal or damaged Red Blood Cell packs e.g. haemolysed RBC, damaged/contaminated in transit.
DAT	Positive DAT	RBC units which are found to be DAT+ during crossmatch which cannot be used and are subsequently discarded.
EMG	Emergency Delivery Charge	Emergency order coloaded onto an ad hoc delivery or sent on a routine run.
HLA	HLA Premium	When the HLA matched product cannot be utilised e.g. due to an inadequate shelf life.
HPA	HPA Premium	When the HPA matched Platelets cannot be utilised e.g. due to damage.
IRR	Irradiation Premium	Use when a requested irradiated product cannot be utilised e.g. damaged product, or when you have been charged for irradiation but it was not requested.
PAC	Packaging Error	Order reconciliation errors, wrong pcm's used, cold chain excursions, label on box incorrect.
REC	Recalled Component	NHSBT initiated recall where the unit is yet to be utilised and is discarded at the hospital.
UAB	Unused Group AB RBC	To claim for expired/unused AB RBC units. Please review your stocks if submitting excessive* UAB claims.
WRC	Washed Red Cells Premium	When the requested washed red cells cannot be utilised e.g. due to damage, cold chain excursion etc.

* excessive considered more than 8 UAB claims per month

List of Comments/Reasons available by Product

Product	Comments/Reason
<p>Cryoprecipitate/ Fresh Frozen Plasma</p>	<ul style="list-style-type: none"> ➤ Split on thaw/Hole in pack ➤ Port Problem ➤ Discoloured/Lipaemic ➤ Lumpy/Aggregates/White Flakes ➤ Labelling/Barcode error ➤ Cold Chain error ➤ Recall ➤ Other
<p>Granulocytes/ Buffy Coats</p>	<ul style="list-style-type: none"> ➤ Adval: CMV/IRR ➤ Visual Abnormality ➤ Pack Defect ➤ Short Expiry ➤ Labelling/Barcode error ➤ Cold Chain error/Wrong PCMs used ➤ Recall ➤ Other
<p>Platelets</p>	<ul style="list-style-type: none"> ➤ Adval: CMV/HLA/HPA/IRR ➤ Hole/Tear in bag ➤ Port problem ➤ Red cell contamination ➤ Discoloured/Lipaemic/Turbid ➤ Aggregates/White flakes ➤ Labelling/Barcode error ➤ Short Expiry ➤ Cold chain error/Wrong PCMs used ➤ Recall ➤ Other
<p>Red Blood Cells</p>	<ul style="list-style-type: none"> ➤ Adval: CMV/IRR ➤ Hole/Tear in bag ➤ Port problem ➤ Damaged/Contaminated in transit ➤ Haemolysed ➤ Clotted ➤ Discoloured/ Lipaemic/ White flakes ➤ DAT positive ➤ Labelling/Barcode error ➤ Short Expiry ➤ Cold chain error/Wrong PCMs used ➤ Recall ➤ UAB ➤ WRC ➤ Other

Please note comments/reasons are product specific and not credit code specific. Each comment will appear regardless of the code chosen. Therefore, please ensure you choose the most appropriate credit code and reason for your credit claim, as this helps with trending. Note both fields are mandatory.

List of Comments/Reasons available for Transport claims

Credit Code	Comments/Reason
ADH/COL/EMG	<ul style="list-style-type: none">➤ Order arrived on a routine run➤ Order coloaded with an ad hoc➤ Routine delivery requested➤ Other

All credit requests are checked and the decision to pay it is at NHSBTs discretion.

Be aware that there is a 3-month time limit to claim ALL credits.

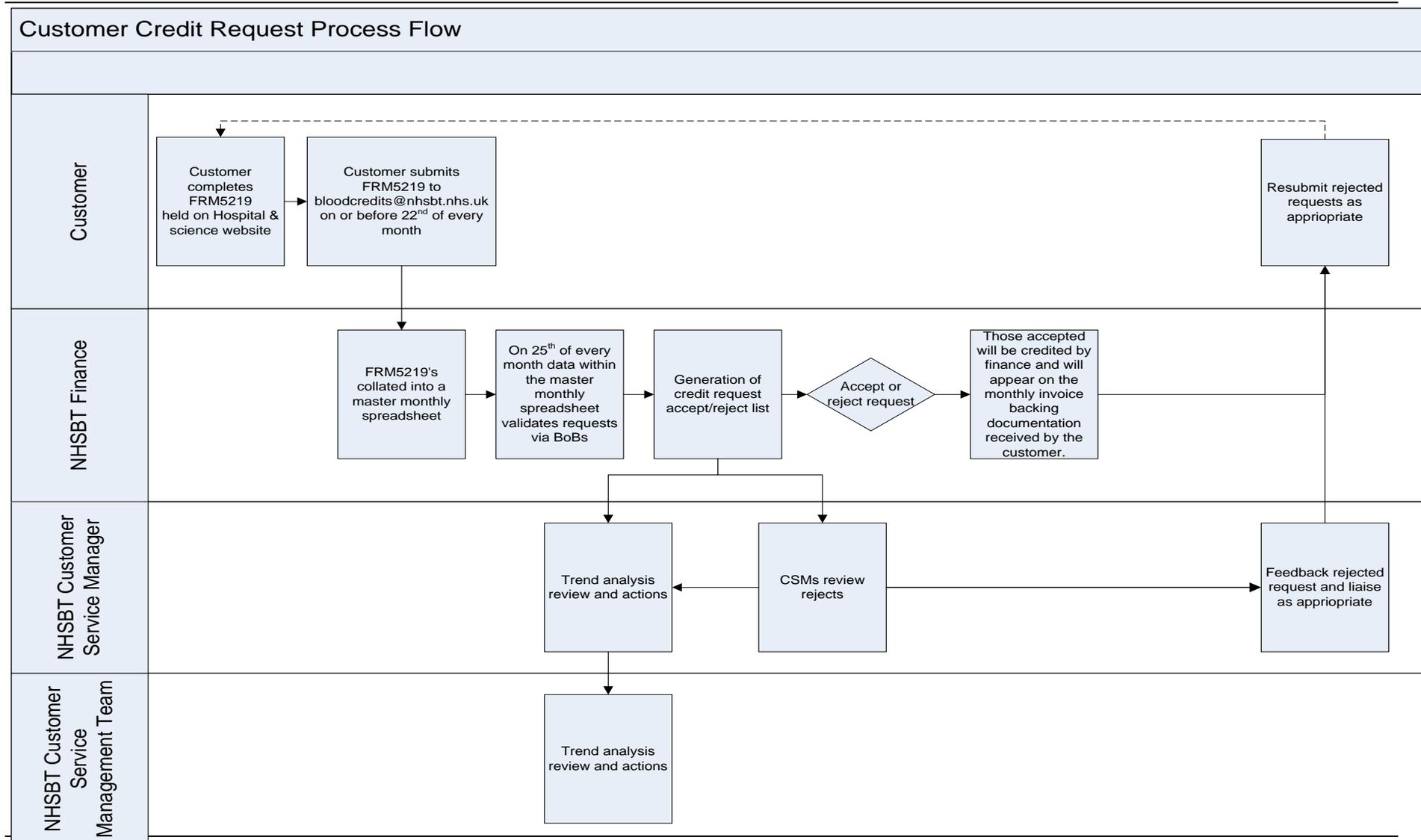
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