

Customer Credit Request Form User Guide



Blood and Transplant

Customer Credit Request Form User Guide

This User Guide is applicable to FRM5219

Customer Credit Request Form User Guide

Table of Contents

Contents	Page
Introduction	3
Where to find FRM5219	4
Getting Started	5
Enabling Macros	5
Tabs Menu	6
Data Entry	6
Wand in a Product	7
Manually enter a Product	9
Request Transport Credit	9
Request Submission	10
Appendix One - Credit Codes	11

Any changes to this document are highlighted.

Customer Credit Request Form User Guide

Introduction

In response to feedback from Hospitals, NHSBT has improved the credit request process.

A new credit form has been developed so that the information can be entered and submitted electronically.

The new form can be found on the [Hospitals & Science website](#)

A signature is no longer required on the form. Once complete email to bloodcredits@nhsbt.nhs.uk. Using the SUBMIT button on the form.

Credit requests submitted on or before the 22nd of each month will be processed by the end of that calendar month. Ideally submit one form for your site each month when possible.

Credit can only be issued to the hospital the components are issued to. If components are transferred between hospitals NHSBT can not credit the receiving hospital.

Do not add additional products to any request form once submitted. A new form needs to be downloaded at the start of each month.

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

Customer Credit Request Form User Guide

Where to find FRM5219

The new form can be found on the Hospitals & Science website following the link below, along with a copy of this user guide.

<http://hospital.blood.co.uk/customer-services/request-for-credit/>

You are here: [Home](#) > [Customer Service](#) > Request for Credit



Request for Credit
Supply Chain Modernisation
Voice of the Customer
Complaints, Compliments and Feedback
Transport
Blood and Transplant Matters

Customer request for credit

- Credit Request Form - [FRM5219](#)
- User Guide - [INF1270](#)

As a result of customer feedback and the need to improve, we implemented a new process in April 2015.

Benefits include:

- Scanning component details directly into the new form
- A reduction in transcription errors resulting in improved efficiency for both Customers and NHSBT
- Removal of the paper-based system
 - form sent by email to bloodcredits@nhsbt.nhs.uk each month
 - on screen confirmation of request sent
 - copy of sent request automatically goes to your 'Sent box'
- Manual entry option available if required

Should there be any reason you can not use electronic version we will continue to accept the paper form ([FRM333](#)) but we will contact you to find out what problems you may be having using the credit request form.

NHSBT will reconcile requests for credit against units issued to hospitals or Trusts, credits will only be provided for units directly issued to an individual hospital or Trust by NHSBT. Credits

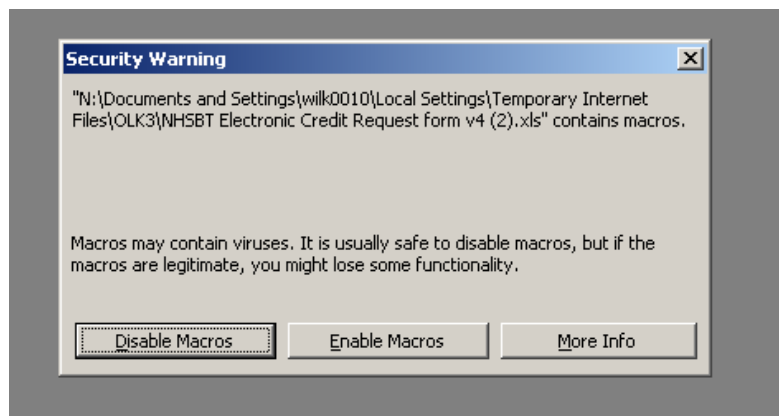
Customer Credit Request Form User Guide

Getting started

The new 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. Page one gives instructions on how to changes 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:

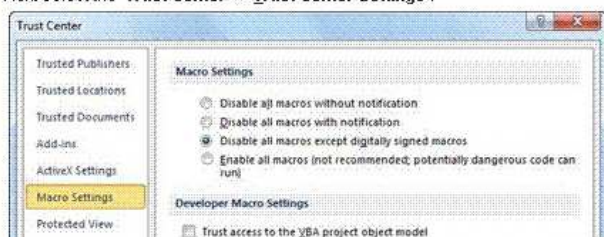
Navigate to the 'Tools' tab, then click 'Macro' and then 'Security'. a Security window will then open.



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 | INSTRLEEC | INSTRMAN | INSTRTRP | MAINPAGE | ELECTRONIC | MANUAL | TRANSPORT

Customer Credit Request Form User Guide

Tabs Menu



There are several tabs within the form. These can be grouped in to two sections

- Instruction Tabs (Grey)
 - MACRO- How to change macro settings
 - INSTRLEC- Electronic entry
 - INSTRMAN- Manual entry
 - INSTRTRP- Transport section

- Data Entry Tabs (Red)
 - MAINPAGE- Your details
 - ELECTRONIC- Scan details on to form
 - MANUAL- Manual entry for those tricky buggers
 - TRANSPORT- charges

Data Entry (red fields indicate mandatory completion)

BLOOD AND COMPONENT CREDIT REQUEST FORM

1. Your hospital Pulse Code

2. Date of submission (drop down menus)

3. Your email address (replaces signature)

Please enter your Pulse No in the yellow box ->

Please choose month and year in the yellow boxes ->

Please enter your email address should we need to contact you in yellow box ->

WAND in a product

MANUALLY enter a product

Request TRANSPORT credit

SUBMIT (EMAIL) TO NHSBT
 (Only do so once a month after collating your credit requests) A popup will appear - click YES when prompted to send email.

MACRO INSTRLEC INSTRMAN INSTRTRP MAINPAGE ELECTRONIC MANUAL TRANSPORT

Once you have entered details in sections 1-3 select appropriate entry method

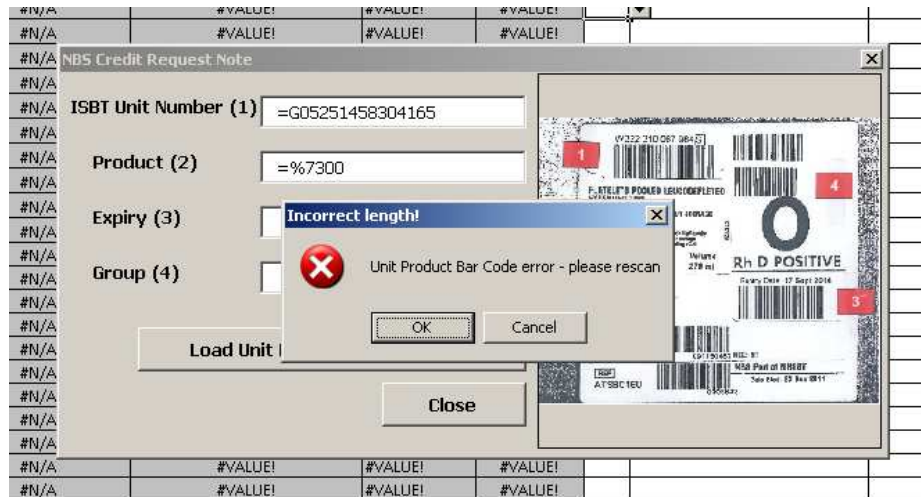
WAND in a product

MANUALLY enter a product

Request TRANSPORT credit

Customer Credit Request Form User Guide

Scan out of order and a warning will highlight the error. Click 'OK'. Go back to relevant box and re-scan data.



NB The alphanumeric format of the barcode will look similar to below. This is not an error



5) When data fields are complete click here to upload data in to the form (if you do not want to submit data press close)

Customer Credit Request Form User Guide

MANUALLY enter a product



This option takes you directly to the MANUAL entry tab.

Enter details using drop down menus where provided or type directly into cells

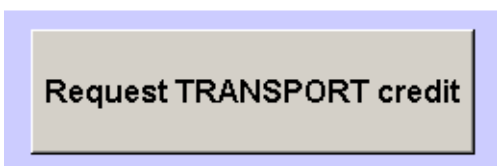
A	B	C	D	E	F	G	H	I
	Product Type	Product	ISBT 128 Unit Number (14 digits)	Check	Expiry Date (dd/mm/yy)	Group	Returned	Credit Code
ospital	Cryo	CRYO (NON UK) MB REMOVED PACK 1						
ospital								
ospital								
ospital								

If there is any reason you can not select options matching the product use the lines at the bottom of the page.

If you wish to have credited is not in the above drop down lists, please enter in FULL the product type, name and details in the rows below.								
ospital								
ospital								

If the data is incorrect the cell will be highlighted in red. Please check and re-enter.

Request TRANSPORT credit



This option takes you directly to the TRANSPORT entry tab for credit requests relating to incorrect Adhoc or Collect charges

Simply enter the Request No\ Delivery Note number and the 'Check' column will self populate.

Select the appropriate code from the drop down list in the 'Credit Code' column.

Enter additional detail in the 'Comments/Other Reason' Column

	Request No\ Delivery Note Number (9 Digits)	Check	Credit Code	Comments/Other Reason
Hospital	H00489658	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H00489659	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H00489660	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H00489661	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H00489662	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H00489663	ADHOC TRANSPORT NUMBER OK	ADH	
Hospital	H002541	ERROR, 9 CHARACTERS FOR REQUEST NUMBER	ADH	
Hospital				

If the data is incorrect the cell will be highlighted in red. Please check and re-enter.

Customer Credit Request Form User Guide

Request Submission

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

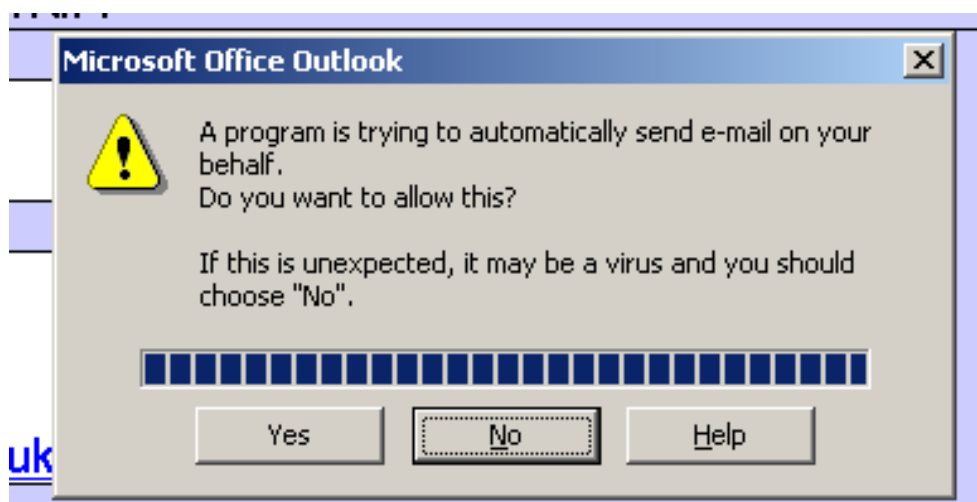
When you are ready to submit your request go to the main page and select 'SUBMIT (EMAIL) TO NHSBT'.

SUBMIT (EMAIL) TO NHSBT

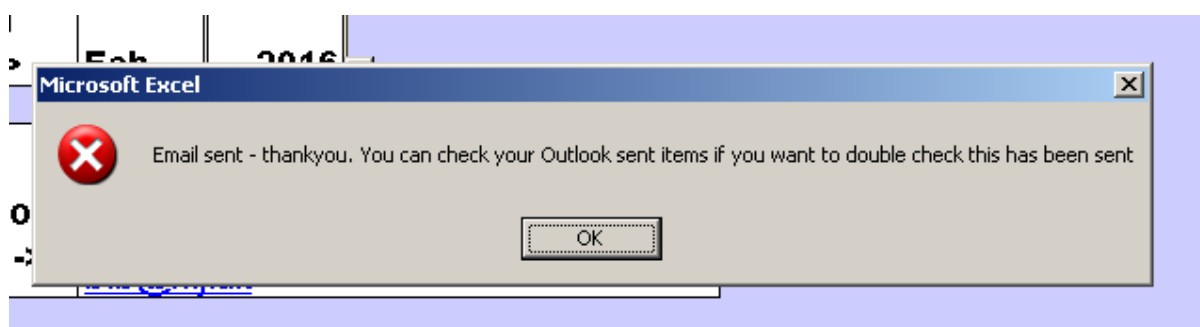
(Only do so once a month after collating your credit requests) A popup will appear - click YES when prompted to send email.

Do not add additional products to this spreadsheet once you have submitted it. [You need to download and start a completely new credit form for each month.](#)

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'



Positive confirmation of 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

Customer Credit Request Form User Guide

Appendix One

Credit Code	Description
ADH	Ad Hoc Charge
CMV	CMV Premium
CRP	Damaged Platelets
COL	Collection Charge
DAC	Damaged Cryo
DAF	Damaged FFP
DAR	Damaged RBC
DAT	Positive DAT
HLA	HLA Premium
IRR	Irradiation Premium
†MIS	Miscellaneous
*PAC	Packaging Error
REC	Recalled Component
UAB	Unused Group AB RBC
WRI	Incorrect Component Received
WRC	Washed Premium

†MIS- When using this code please supply additional details in the comments column

*PAC-Packing Error to be used for any events involving cold chain excursions, packing errors, damaged transport boxes.

Customer Credit Request Form User Guide

