
Inventory Transaction Types:

- **Make Units Available** –used to make units “Available” that were discarded, issued, returned, or transferred within the BloodHub inventory.
- **Crossmatch Units** –for units that have been assigned to a patient and not available to regular inventory
- **Issue Units** –used to issue a unit and removed from the regular inventory
- **Discard Units** –used to discard expired products and/or broken plasma products and to request credit as applicable
- **Quarantine Units** –used to quarantine a unit. This status must be applied prior to returning the unit(s) for Quarantine to OneBlood
- **Return Units** –used if units are physically being returned to OneBlood and to request credit as applicable. This transaction provides the option to select a supplier (defaulted to primary distribution hub), Return Reason and automatically creates a pickup request for a OneBlood courier. This transaction return reason must be selected.
 - **Return for Re-Issue** – unit is not expired and can be reshipped to another customer
 - **Return for Quarantine** – unit is to be returned due to Quarantine. Quarantine status must be applied prior to creating transaction.
 - **Return due to Outdate** – DO NOT USE, the Discard Inventory Transaction should be used because expired products are not returned to OneBlood.
- **Transfer Units** - used to transfer units to another hospital and to request credit as applicable. This transaction provides the option to create a pickup request for a OneBlood courier.

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Create an Inventory Transaction:




Follow the steps below to assist customer in creating an inventory transaction:

Step	Action															
1	Select 'Manage Inventory' to the left of the Search Field															
2	<div> <div>Select "Transaction Type" desired and follow table below</div> <table> <tr> <th>If type ...</th><th>Then ...</th></tr> <tr> <td>Make Units Available</td><td rowspan="2">proceed to next step</td></tr> <tr> <td>Crossmatch Units</td></tr> <tr> <td>Issue Units</td><td> <ul style="list-style-type: none"> select "Wait Time" (<i>amount of time that must elapse before product is presumed transfused</i>) from the drop down menu select date units were issued from calendar menu when prompted if entering units issued in the past </td></tr> <tr> <td>Quarantine Units</td><td>proceed to next step to add the status of "Quarantine" prior to creating a "Return for Quarantine" inventory transaction</td></tr> <tr> <td>Discard Units</td><td>select appropriate reason from "Discard Reason" drop down menu</td></tr> <tr> <td>Return Units</td><td> <ul style="list-style-type: none"> select Supplier from "Return To" drop down menu select appropriate reason from "Enter Return Reason" drop down menu <p>Note: Quarantined units, must be set to a "Quarantine" status within BloodHub prior to returning. If the products are out of date, a "Discard" inventory transaction needs to be completed unless the customer is physically returning the expired products to OneBlood</p> </td></tr> <tr> <td>Transfer Units</td><td> <ul style="list-style-type: none"> select "Now" or "In the past" for "Transacted at" section enter the customer that the product(s) are being transferred to in the "Transfer destination:" field select the toggle switch to change from "NO" to "YES" to create a pickup request for a OneBlood courier for "Pickup Needed:" </td></tr> </table> </div>	If type ...	Then ...	Make Units Available	proceed to next step	Crossmatch Units	Issue Units	<ul style="list-style-type: none"> select "Wait Time" (<i>amount of time that must elapse before product is presumed transfused</i>) from the drop down menu select date units were issued from calendar menu when prompted if entering units issued in the past 	Quarantine Units	proceed to next step to add the status of "Quarantine" prior to creating a "Return for Quarantine" inventory transaction	Discard Units	select appropriate reason from "Discard Reason" drop down menu	Return Units	<ul style="list-style-type: none"> select Supplier from "Return To" drop down menu select appropriate reason from "Enter Return Reason" drop down menu <p>Note: Quarantined units, must be set to a "Quarantine" status within BloodHub prior to returning. If the products are out of date, a "Discard" inventory transaction needs to be completed unless the customer is physically returning the expired products to OneBlood</p>	Transfer Units	<ul style="list-style-type: none"> select "Now" or "In the past" for "Transacted at" section enter the customer that the product(s) are being transferred to in the "Transfer destination:" field select the toggle switch to change from "NO" to "YES" to create a pickup request for a OneBlood courier for "Pickup Needed:"
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3	Enter any transaction comments in the "Comments" box as applicable. Note: Comments section applies to the entire transaction and is limited to 255 characters.															
4	Select "Continue" to have the system create an inventory transaction number															

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Create an Inventory Transaction, *continued*:

Continue following the steps below to assist customer in creating an inventory transaction:

Step	Action						
5	<p>Enter product associated with transaction</p> <table border="1"> <thead> <tr> <th>If product is ...</th><th>Then ...</th></tr> </thead> <tbody> <tr> <td>physically available to scan</td><td> <p>Scan the unit number and product code into the available fields and proceed to next step</p> <ul style="list-style-type: none"> • If BloodHub doesn't automatically enter the ABO and expiration date: <ul style="list-style-type: none"> – select Green "+ Add" – select the product blood type from the drop down menu – select the product's Expiration date from the calendar menu • Do NOT scan the Expiration date of the product. If scanned, the current date will be automatically applied to the unit and a CRM – Customer Service Opportunities Service Order will need to be submitted containing the unit number, product code and the correct expiration date. • The OneBlood BloodHub support team will submit a support ticket with BloodHub to modify the unit </td></tr> <tr> <td>not physically available to scan</td><td> <p>Select the ellipsis button  and proceed to the next step</p> <p>Note: "Available, Crossmatch, and Quarantined Units" listing will display</p> </td></tr> </tbody> </table> <p>Notes:</p> <ul style="list-style-type: none"> • Units ordered, verified properly and shipped through BloodHub are made available within the customer's BloodHub Available Inventory once the order is set to a Delivered Status. • If the entire unit number and/or product code are not entered correctly, a warning message displays, asking the user if the unit number and product code are correctly entered. The user has the option to select "No, it is wrong!" and enter the information in the correct format. The user will never select "Yes, it is correct.". Units must be in ISBT format. Units not in ISBT format will appear under BloodHub Inventory in the "No Product" tab: Investigate the error and fix the unit. 	If product is ...	Then ...	physically available to scan	<p>Scan the unit number and product code into the available fields and proceed to next step</p> <ul style="list-style-type: none"> • If BloodHub doesn't automatically enter the ABO and expiration date: <ul style="list-style-type: none"> – select Green "+ Add" – select the product blood type from the drop down menu – select the product's Expiration date from the calendar menu • Do NOT scan the Expiration date of the product. If scanned, the current date will be automatically applied to the unit and a CRM – Customer Service Opportunities Service Order will need to be submitted containing the unit number, product code and the correct expiration date. • The OneBlood BloodHub support team will submit a support ticket with BloodHub to modify the unit 	not physically available to scan	<p>Select the ellipsis button  and proceed to the next step</p> <p>Note: "Available, Crossmatch, and Quarantined Units" listing will display</p>
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not physically available to scan	<p>Select the ellipsis button  and proceed to the next step</p> <p>Note: "Available, Crossmatch, and Quarantined Units" listing will display</p>						
6	<p>Select the check box for the desired unit(s) and chose "Select"</p> <p>Note: Verify the Unit # and Product Code are correct</p>						
7	<p>Select the toggle switch from "NO" to "YES" to Request Credit as applicable</p>						
8	<p>If applicable:</p> <ul style="list-style-type: none"> • Read and, if agree to terms, select the "I agree to these terms." check box • Certify that products are acceptable for transaction on the transaction confirmation screen <p>Note: Customer needs to complete proper documentation for returns/transfers.</p>						

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Create an Inventory Transaction, *continued*:

Continue following the steps below to assist customer in creating an inventory transaction:

Step	Action	
9	Follow the table below per the appropriate transaction option:	
	To ...	Then ...
	Continue transaction	select “Continue”
	Cancel transaction	<ul style="list-style-type: none">• select “Cancel Transaction”<ul style="list-style-type: none">– “Cancel Transaction?” message appears notifying user the pending transaction will be cancelled and the data will need to be reentered• select “Yes, I’m Sure” or “No, Go Back”
	Save a pending transaction	<ul style="list-style-type: none">• select “Save Pending Transaction”<ul style="list-style-type: none">– a webpage message appears, notifying user that the AVAILABLE transaction will be saved as pending.<ul style="list-style-type: none">▪ the pending transaction can be viewed from the Transaction List and by selecting the Pending tab.• select “OK”<ul style="list-style-type: none">– select desired Transaction Number from the Pending tab to proceed with transaction when Transaction List appears
	Note: Transactions not processed completely will automatically be placed in “Pending” status. Pending transactions need to be monitored.	
10	Verify the accuracy of the transaction	
	If the transaction is ...	Then select ...
	correct	“Confirm”
	incorrect	“Edit Transaction”
11	Select “f5” to refresh screen Note: The QR Label will display on the packing slip for returns and transfer inventory transactions with a pickup request	
12	Print Transaction as applicable Note: Return and Transfer inventory transactions must be printed, completed and accompany the unit(s)	
13	Complete the ‘Packing Slip’ section of printout to include: <ul style="list-style-type: none">• Product being packed• Visual Inspection• Initial/Date Note: Notify OneBlood Distribution personnel if returning Quarantine units The completed BloodHub printout/packing slip must accompany the unit(s) being returned or transferred	

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Completing a Pending Transaction:

Follow the steps below to complete a pending transaction.

Step	Action
1	Select the “Inventory” tab to the left of user name
2	Select the “Transaction Listing” link
3	Select the “Pending” tab
4	Select respective Transaction Number
5	Refer to Step 5 of “Create an Inventory Transaction” section

Error Message in Electronic Inventory:

An error message may appear during the electronic management of inventory.

If Message is ...	Then explanation is ...
Red	Hard Limit: Product status is unacceptable for current transaction
Yellow	Soft Limit: Product status is acceptable for current transaction but may require additional action

Inventory Summary

Select the “Inventory” tab to the left of user name

- The Inventory summary is categorized by product type:
 - RBCs
 - Frozen
 - Platelets
 - No Product
 - Units not within ISBT format will appear under BloodHub Inventory in the “No Product” tab: Please contact bloodhub@oneblood.org for OneBlood to investigate the error and fix the unit(s).
- Total number of units are listed by product and by blood type

Note: If any units are cross-matched or quarantined, the respective icon is displayed

Inventory Detail:

Follow the steps below to view the inventory detail:

Step	Action
1	Select the “Inventory” tab to the left of user name
2	Select the “Unit Listing” link on the Inventory Summary page Notes: <ul style="list-style-type: none">• Inventory Summary is categorized by product type: Platelets, RBC, Frozen and No Product• Units not within ISBT format will appear in the “No Product” tab: Notify OneBlood Distribution personnel to investigate the unit.
3	Chose the respective Unit Number and select “View Audit Trail” to view the details concerning an individual unit

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Transaction Listing:

Follow the steps below to view the transaction listing:

Step	Action
1	Select the “Inventory” tab to the left of user name
2	Select the “Transaction Listing” link on the Inventory Summary page Note: The date range is defaulted to “Today”. The list can be filtered by another date option by selecting from the drop down menu
3	Viewing Transactions: <ul style="list-style-type: none">• Select the “Completed” tab to view a completed transaction<ul style="list-style-type: none">– Transactions are listed separated by transaction type• Select the “Pending” tab to view a pending transaction.<ul style="list-style-type: none">– Select respective transaction number to access a pending transaction to finalize, cancel, or edit the transaction• Select the “Presumed Transfused” tab to view units reported to the blood center as presumed transfused<ul style="list-style-type: none">– Units are presumed Transfused by the selected Wait Time chosen when the unit was Issued in BloodHub