**POLICY**

* The Canadian Blood Services (CBS) Blood Component and Product Disposition Report must be completed and submitted to CBS by the 10th working day of every month. See http://dispositioninventory.blood.ca to access the report and the User Guide.
* Associated month end duties include utilization reports of inventory management and Service/Non Service Units

**PROCEDURE:**

1. Collect the following forms:
   * 1. -Blank IHL-TMD-VII Monthly Inventory Balance Worksheet –Ouellette
     2. -IHL-TMD-VII Daily Inventory Balance Form-Ouellette (form #4-1758) from the 1st day of the month you are balancing and the 1st day of the new month. i.e. Balancing Aug: need Aug 1 and Sept 1.
     3. Completed IHL-GEN Hematopathology units: Transfusion Medicine -Ouellette
2. **MONTHLY INVENTORY BALANCE USING: IHL-TMD-VII Monthly Inventory Balance**

**Worksheet-Ouellette**

The final balance of all blood components must correlate physical count of each component on the first day of the present month.

* 1. Record the Month and Year at the top of the form
  2. Print ‘Disposition tab’ from the ‘Inventory excel file’
  3. Print the ‘utilization tab’ from the ‘WRO TM Daily Units’ folder for the month you are balancing. (Ensure that everything has been entered from CBS and transfer slips)
  4. Open the ‘Transfusion record excel file’ for the month you are balancing. Check over the Transfusion Record (Logbook) for any errors/omissions. Ensure that all patients have at least a “1” in the month end ‘issue column’ ( will not have anything when products are sent to other hospital)
  5. Ensure that the ‘blue line’ should not be on the 1st. Should be at 2300hr the 30/31st. No blue line until balancing on the 2nd
  6. Units Transfused-In the RBC tab- Sum the ‘IP’, ‘OP’, ‘RDU’ and ‘ER’ columns separately on the spreadsheet after the last entry and add together to get the total # of PC’s transfused. \* subtract the (total # transfused – total # returned). This represents your total # transfused for PC’s. This would be the same for all other blood products as well. Any discards will be captured in the disposition tab as wasted. Enter # PC’s transfused at the top of the IHL-TMD-Monthly Inventory Balance Worksheet-Ouellette
  7. Patients Transfused- Sum the ‘patient’s transfused ‘column for PC’s and each blood component (PLT’s, APC’s, AFH, FP, AFP, CRYO, and CSP). These values will be used when completing the CBS Blood Component and Product Disposition report.
  8. Complete the IHL-TMD- Monthly Inventory Balance Worksheet-Ouellette by filling in appropriate boxes with information from the Transfusion Record, Disposition tab and utilization printouts. Balance the components in each column - RBC, PLT Pooled, PLT Apheresis Plasma – FFP, FP, ACD FFP, Plasma – APHERESIS, CSP, CRYO, Autologous PC/FP, :
     + 1. Record the On hand first of month using the first of the month Daily Inventory Balance form
       2. Record the ON HAND end of month using the first of the month Daily Inventory Balance form
       3. ADD - Received from CBS
       4. ADD - Received from OH (other hospitals)
       5. SUBTRACT - Transfused
       6. SUBTRACT – Outdated
       7. SUBTRACT – Broken
       8. SUBTRACT – CBS recall
       9. SUBTRACT – Other discards
       10. SUBTRACT – to OH
       11. Final total – must match the ON HAND – end of month. The final balance must correlate with the number of each component in the refrigerators, incubators, and freezers on the first day of the present month.
  9. On IHL-TMD- Monthly Inventory Balance Worksheet-Ouellette - for RBC’s and PLT’s (PPOOL and AP5), indicate the ABO types of wasted products in appropriate boxes.
  10. If you are not balancing- Verify CBS packing and transfer slips against #’s entered in utilization report and that the inventory for expired/discarded matches what it is the disposition tab. Also ensure that the ‘issue’ has been assigned for every patient in the transfusion log.
  11. Correct utilization spreadsheet electronically if necessary. Verify/correct disposition report, and transfusion record electronically with corrected utilization report.

**3.0 CBS BLOOD COMPONENT DISPOSITION REPORT – UNIT DISPOSITION:**

Complete and submit CBS month end report by the 10th working day of the month. . See http://dispositioninventory.blood.ca to access the report and the User Guide.

*\*Extra info required:*

* Number of patients transfused
* Specific blood groups for all outdated components
* Broken vs. wasted vs. other product disposition

1. **TM CLINICAL LEAD MONTHLY CONSULTATION REPORT:**

Fax completed pathology consult report – (IHL-GEN Hematopathology units: Transfusion Medicine -Ouellette ) to number on bottom of form

1. **SERVICE AND NON SERVICE UNITS:**

Service and non service units are to be completed by the 15th of every month and submitted to Lab Manager. See IHL-TMD-I Daily and Monthly Workload Units –Ouellette,

IHL-TMD-I Additional Items to Add for Month End Units-Ouellette , IHL-I Tips for Documenting Units-All Staff-Ouellette, and IHL-TMD-TM MIS Units Legend