**Purpose:**

This procedure provides instructions for printing the daily operations reports that help manage inventory, track samples, and determine blood utilization. Daily Operations Reports will include all blood storage locations defined in Sunquest (SQ) unless otherwise specified at the AREA prompt. These reports are accessed through Smart Term, in the Roll and Scroll function, and not in the GUI function in Sunquest.

**General information:**

All reports can be printed to printer #413 or printed to the screen as printer #0.

**Procedure:**

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| **Report** | | **Report Definitions:** |
| **BBR1** | **Expired Crossmatch List** | * Printed daily to determine which crossmatches need to be extended or released. The list is used as a reference for removing unit tags from the units. * If a crossmatch needs to be extended, use Blood Order Processing to update the expiration period (EXX). * After all updates are completed, use BEC (Release Expired Crossmatches) function to release the units. The system then changes the unit status from allocated (AL) to released (RL) and returns the units to inventory. |
| **BBR2** | **Product List** | * Printed for reconciliation of location inventories:   + E.D. Refrigerator   + ALNW Coolers   + TSL |
| **BBR4** | **Expired Blood Product List** | * Printed daily to determine which products (if any) have expired but have not been removed from inventory. |
| **BBR5** | **Issued, Unreported Units List** | * Printed daily to determine if any units remain in an issued status, but have not been moved to Final Issued. |
| **BBR7** | **QA Report** | * List of all QA failures. |
| **BBR12** | **Short outdate summary** | * List of all blood components expiring within 14 days. * Printed daily for RBCs, platelets, and thawed plasma * Printed monthly for frozen products |
| **BBR13** | **Inventory Summary Report** | * Units in inventory, by status, component, group and type. * Excludes Directed/Autologous units |

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| **Step** | **SQ Function** | **Action** |
| **BBR14** | **Patient/Unit Pending Log** | * Option 1 lists all accession numbers in which UO exceeds UA, and all accession numbers that have incomplete patient/unit testing * Option 3 lists all accession numbers in which units allocated and/or issued exceeds units ordered |
| **PL** | **Pending Log** | * Patient/Unit Pending Log is a list of patient orders with incomplete patient/unit testing |
| **Compiling Reports** | | |
| **1** | **BBR1 - Expired Crossmatch List** | Log into SmarTerm and in Function prompt enter BBR   * Select option 1 (Expired Crossmatch List) * At “Hospital” prompt, Enter “H” and return twice * Hospital Selected will show as “H”. Enter A to accept. * At “Location” prompt, Hit Enter, then A to accept.   Print and review the list, updating any that are appropriate.  Visually check allocation shelf as not all expired crossmatches appear on report. These will need manual removal in BOP |
| **2** | **BEC** | Hit ENTER again at the Printer Prompt, and return to Main Function Prompt   * Enter BEC * At “Hospital” prompt, Enter “H” and return twice * Hospital Selected will show as “H”. Enter A to accept. * Screen prompt: “expired crossmatches to be released for hospital(s) Harborview Medical Center”. * At the “Confirm (Y/N) prompt, do one of the following: * Enter Y to release all crossmatches for HMC * Enter N or Press RETURN for the N default to cancel the action.   This function will only remove crossmatched units appearing on the expired crossmatch report. Units that do not appear on this report but are found through visual inspection must be removed in BOP. |
| **3** | **BBR2 –**  **Product List** | Log into SmarTerm and in Function prompt enter BBR   * Select appropriate SQ printer. * Select option 2 (Product List) * At “Hospital” prompt, Enter “H” and return * At “Area” prompt, Enter appropriate location:   + EDH: E.D. Refrigerator   + Boeing: Coolers * Enter twice through Hospital ID and Hospital Selected. * Display shows “H: EDH”. * Enter A to accept. * Enter through “Earliest Expiration date” and “Earliest Expiration Time” * At Status Breakdown, Enter Y * Enter through Component Groups Requested and ABO/Rh * Print Detail: Y * Units with Product Testing: C (Complete) * Active Units Only: Y * Enter A to accept   Utilize report for inventory management as indicated by SOP. |
| **Step** | **SQ Function** | **Action** |
| **4** | **BBR4 - Expired Units List** | Log into SmarTerm and in Function prompt enter BBR   * Select option 4 (Expired Products List) * At “Hospital ID” prompt, enter “H” and return * At Area prompt, return to default to ALL active areas added. * At “Hospital ID” prompt, return * Hospital Selected will show as “H: noarea”. Enter A to accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * Print and review expired products list. Physically resolve by locating and finalizing unit status. * Report any discrepancies to TSL manager or Lead. |
| **5** | **BBR5 - Issued, Unreported Blood Product List** | Log into SmarTerm and in Function prompt enter BBR   * Select Option 5. (Issued, Unreported Blood Products) * At Hospital prompt, Enter “H” and return * At Area prompt, Return to default to ALL Active areas added. * At “Hospital ID” prompt, return * Hospital Selected will show as “H”. Enter A to accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * Print and review the IUL. * Correct Attribute billing prior to running function BIF. * Change Units not transfused or any units that should not be changed to “Issued, Final” to appropriate status before running function BIF (Blood Issued Final) which puts all issued units as final transfused, and charges them. |
| **6** | **BIF** | Log into SmarTerm and in Function prompt enter BIF   * At Hospital prompt, Enter “H” and return * At Area prompt, Return to default to ALL Active areas added. * At “Hospital ID”, return * Hospital Selected will show as “H”. Enter A to Accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * The following prompt is displayed: “Blood Product Unit Issues to be finalized. * Confirm (Y/N)” * Enter Y or N as appropriate. |
| **7** | **BBR7 - QA Report** | Log into SmarTerm and in Function prompt enter BBR.   * Enter 7 for report to run. * Select H for HID and RETURN twice. * Enter A for Accept. * At “Type of Report” prompt, Enter F for Full Report. * The start date is required. Enter T for today or if applicable, run a range with T-7 for weekly, etc. * Leave for Manager review. |

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| **Step** | **SQ Function** | **Action** |
| **8** | **BBR12 – Short Outdate Summary** | **Daily:**  Log into SmarTerm and in Function prompt enter BBR   * Select Option 12 (Short Outdate Summary) * At Hospital prompt, Enter “H” and return * At Area prompt, return to default to ALL Active areas added. * At “Hospital ID”, return * Hospital Selected will show as “H”. Enter A to Accept. * Enter through “Earliest Expiration date” and “Earliest Expiration Time” * At Status Breakdown, Enter Y * Enter through Component Groups Requested * Enter A to accept   **Monthly:**  Log into SmarTerm and in Function prompt enter BBR   * Select Option 12 (Short Outdate Summary) * At Hospital prompt, Enter “H” and return twice * Hospital Selected will show as “H”. Enter A to Accept. * Enter T+14 at “Earliest Expiration date” * Enter through “Earliest Expiration Time” * At Status Breakdown, Enter Y * Enter PLSG and CRYG at Component Groups Requested * Enter A to accept |
| **9** | **BBR13 - Inventory Summary Report**  **BBR20 – Directed /**  **Autologous Units** | Log into SmarTerm and in Function prompt enter BBR.   * Select Option 13 (Inventory Summary)   + Enter H at Hospital prompt   + Enter A to accept*.* * At Area prompt, return to default to ALL Active areas added. * At “Hospital ID”, return   + Hospital Selected will show as “H”. Enter A to Accept.   + At Component/Type/Group prompt, return through to default to all. * Enter A to accept.   + Units will be listed in categories by status and by component type and group and type.   + Reconcile against physical counts.   + Use BBR 2 to research discrepancies. * To print Auto and Directed units, select BBR 20.   + Select option 20 (Auto/Directed)   + Enter H at Hospital prompt, Hit enter twice   + Enter A to accept*.* * Hospital Selected will show as “H”. Enter A to Accept. * Enter through Hosp. No., Component Type/Group, and Status * Enter A to accept. * Screen will display your request for all patients * Enter A to Accept * Screen will display your request for all components and statuses. * Enter A to Accept. |

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| **Step** | **SQ Function** | **Action** |
| **10** | **BBR14 - Patient/Unit Pending Log** | Log into SmarTerm and in Function prompt enter BBR.   * Enter 14 for Report to run. * Select H for HID and return again. Then use A to Accept. * Next prompt is the worksheet to run. Enter HBBG. Return again and A to accept. Select #1 for by Accession Number or #3 for By Unit Number * Option 1, resolve all accession numbers that list units with incomplete testing. If testing was added and is no longer needed, it may be cancelled with the code YBBCAN. * Option 3, resolve all listed discrepancies between Units Ordered (UO) and Units Allocated (UA). |
| **11** | **Pending Log (PL)** | Log into SmarTerm and in Function prompt enter PL.   * Use Yesterday’s date as start date, and end date with current time, or use dates as appropriate for your needs. * Accept the default response for the following prompts: preliminary results, AD comments, rack numbers, expanded comments * Enter A in include CID data. * At the (A)ll (R)eceived (U)nreceived prompt enter R * Enter through Hospital ID(s) * ENTER HBBG for Worksheet(s). * Press enter until you see “accept” and press enter again to print the report |

**References:**

Standards for Blood Banks and Transfusion Services, Current Edition. American Association of Blood Banks. AABB Press, Bethesda, MD.

Blood Bank User Guide, Misys Laboratory