**TITLE: TQC Inventory Tasks 4840 LIS-243**

1. **Batch Receiving**
2. QC Item (Controls, Reagents, and Consumables) have been setup in TQC. When batch receiving QC items, the data from the setup programming is used, not Lot Record data.
3. Batch receiving allows you to register multiple lot records at one time.
4. QC item set-up labels are available for use with a barcode scanner.
5. Lot Registration via Batch Receiving

Open the Batch Receiving tab under Lot Records.

* 1. Scan the QC Item Setup record Label with the cursor in the “Search for item record number:” field – OR
  2. Scan the UPC code from the manufacturer if defined in the setup record in the “UPC” field – OR
  3. Enter/Search for the QC item ID in the Item(s) in the ID field. Select all the QC items to be received.
     1. The system adds the QC item(s) to Batch Receiving grid.
     2. Check that the correct item ID and/or item name is correct for each item requested.
     3. The fields with the red X are required entry fields.
  4. Enter the Lot Number. If we have received the same lot number previously, but this is a new shipment, enter the lot number with an additional number (i.e. -1,-2) to differentiate the shipments.
  + Enter the Received date, Expiration Date, Number of units received, and the Purchase unit in the appropriate required fields.
    - View the Status field, “Not Active” displays be default, use the lookup to edit the status to “Testing” or “Active” based on our SOP as needed
    - “Testing” status is used primarily for new lots of control with a Mean/SD result type. This enables new lot correlation/validation to be run with results going into the Testing parameters automatically using the appropriate QC identifier. “Testing” status is not needed for new lots of reagent kits. For reagent kits with a 30 day QC requirement, the scheduler does not track “Testing’ or “Not Active” lots. It will only keep track of “Active” lots.
  + Continue until all items have been entered in the Batch Receiving grid
  + Click the Batch Receiving button at the bottom right corner of the screen.
    - Lot Records are created and saved to the database
      * A green check icon displays in the Processed column for each successful lot record creation
      * A yellow “warning” icon displays in the Processed column for each lot record that was created, but includes missing information. An example of this would be a control lot record is registered in Not Active or Testing status, but does not include Expected Results for at least one parameter listed in the Active Parameters tab.
      * A red “error” icon displays in the Processed column for item that contained an error which prevented the lot record from being created. An example of this would be a control lot record registered in Active Status, but does not include Expected Results for at least one parameter listed in the Active Parameters tab
    - If a box comes up “At least one lot number already exists in the database. Are you sure these lot numbers are correct?”
      * This will appear if it is a current lot number, but a new shipment. For reagent kits, select “NO” and repeat the batch receiving process using the additional number (-1,-2) added tp the lot number.
      * This will appear if a different department is using the same QC material and has previously batch received it. Select “YES” to enter it into your department QC.
      * Recheck the lot number and the other entry fields to make sure the information is correct. If correct, select “YES”, if incorrect, select “NO” and reenter the correct information.

1. **Printing QC Identifier Barcode labels.**

* In Lot Records, select the QC item.
* On the top of the screed select “Record”.
* Select “QC Identifiers”.
* Click the box “Print Labels”.
* Check/uncheck boxes to select which labels are to be printed.
* On the bottom of the screen, the Network printer defaults to M15\_LABLABEL2 or M07\_LABLABEL1. These printers are formatted for larger labels. Use the look up box to change the printer. Use the M30\_Zbloodbank printer, which is formatted for a smaller size barcode label.
* Click the “RUN” box.

1. **Opening and Closing Lot Records**

* The Scheduler will automatically close expired QC items ( controls and reagents) at midnight. It will then automatically open the next expiring available lot number with a “Testing” or “Not Active” status, unless another “Active” lot is available.
* If QC items need to be opened (“Active”) before the current lot expires (EX. If current QC material runs out), or be closed(“Not Active”) before their expiration date, these lots need to be manually closed.
* If you are in “LOT RECORDS” and cannot find any lot records for a particular QC item, click on the “Flags” box in the third line of lot records.

****

When the flags box opens Uncheck(unselect) any boxes which are

checked and click OK. You may narrow your search by choosing your department in the Department drop down box. . Now continue your search in Lot Records. this will list ALL the lot records (Testing,Active, Not Active lots) in TQC

1. **Manually Opening a Lot Record.**
2. From the Launch bar select “Inventory”.
3. Select “Lot Records”. enter search criteria to narrow the search. (EXAMPLE: enter Department, Lot record number>>>>).
4. Click the OPEN icon on the second line in the top left corner of the screen ( it looks like an opening folder).
5. Select the QC item and lot number (if more than one lot is listed).
6. Click the EDIT icon ( located next to the OPEN icon).
7. On the top line, click “LOT ACTIONS”. A drop down box opens. Click “Open Lot”.
8. The OPEN Lot box will appear. If this is the correct lot to open, click the “Open Selected Lots” box on the bottom right corner of the screen. If it is not the correct lot, click “cancel” box and start over.
9. All records included in the grid will be Statused as “Active”, and the “O” flag will be set for the lot record. A system generated “[OPEN]” action will be automatically attached to the lot record, documenting the date, time and the tech performing the close lot action. An additional “Open Lot” Action is not required by the system, however the ability to manually add the action is available, and can be required.
   * + Once the Open Lot function is complete, a green “checked” icon displays in the Select column to indicate the lot was successfully opened, no errors, or warnings for the lot were detected.
     + If a yellow “warning” icon displays in place of the green “checked” icon, the lot record was successfully opened, however data is missing from a non-required field. Users should place the mouse over the warning icon to view the tool tip. This will indicate what item should be reviewed/updated to clear the warning.
     + If a red “error” icon displays in place of the green “checked” icon, the lot record was NOT successfully opened, as data is missing from a required field, or some other error has occurred. Users should place the mouse over the error icon to view the tool tip. This will indicate what item should be reviewed/updated to clear the error.

* 1. As part of the process, the system displays a prompt when at least one other Active lot record exists for the QC items of the lot records selected. “Would you like to close the record(s)?” Users can close the Active lot record previously in use by clicking Yes.
     + If “No” is selected, the selected lots remain active and the process ends.
     + Selecting “Yes” will open the Close Lot tab with the next available lot record for the appropriate QC items loaded to the Close Lot grid.
       - Select the desired records by placing a check in the Select column, and then click the Close Selected Lots button.

1. **Manually Closing a Lot Record**
2. From the Launch bar select “Inventory”.
3. Select “Lot Records”. Enter search criteria to narrow the search. (EXAMPLE: enter Department, Lot record number…..).
4. Click the OPEN icon on the second line in the top left corner of the screen ( it looks like an opening folder).
5. Select the QC item and lot number (if more than one lot is listed).
6. Click the EDIT icon ( located next to the OPEN icon).
7. On the top line, click “LOT ACTIONS”. A drop down box opens. Click “Close Lot”.
8. The Close Lot box will appear. If this is the correct lot to close, click the “Close Selected Lots” box on the bottom right corner of the screen. If it is not the correct lot, click the “cancel” box and start over.
9. A TQC message box may appear stating “At least one pending or nonverified QC order exists for this lot record. Would you like to open these orders in Result Entry to review, cancel result, or verify before closing?”

- Click yes and proceed to the pending of nonverified QC orders. Perform any necessary procedures on these non-completed orders.

- When finished, repeat the “Close Selected Lots” procedure again. If the TQC message box appears again but you feel that all the pending orders have been rectified, click “NO” and finish closing the lot.

1. All records included in the grid will be Statused as “NotActive”, and the “C” flag will be set for the lot record. A system generated “[CLOSE]” action will be automatically attached to the lot record, documenting the date, time and the tech performing the close lot action. An additional “Close Lot” Action is not required by the system, however the ability to manually add the action is available, and can be required.
   * + Once the Close Lot function is complete, a green “checked” icon displays in the Select column to indicate the lot was successfully closed, no errors, or warnings for the lot were detected.
     + If a yellow “warning” icon displays in place of the green “checked” icon, the lot record was successfully closed, however data is missing from a non-required field. Users should place the mouse over the warning icon to view the tool tip. This will indicate what item should be reviewed/updated to clear the warning.
     + If a red “error” icon displays in place of the green “checked” icon, the lot record was NOT successfully closed, as data is missing from a required field, or some other error has occurred. Users should place the mouse over the error icon to view the tool tip. This will indicate what item should be reviewed/updated to clear the error.
2. As part of the process, the system displays a prompt when at least one other Active lot record exists for the QC items of the lot records selected. “Would you like to open the record(s)?” Users can open the next available lot record by clicking Yes.
   * 1. If “No” is selected, the selected lots remain Closed (not Active or Testing) and the process ends.
     2. Selecting “Yes” will open the Open Lot tab with the next available lot record for the appropriate QC items loaded to the Open Lot grid.
        1. Select the desired records by placing a check in the Select column, and then click the “Open Selected Lots” button.
3. When opening or closing lots, the system automatically checks other lots for that particular QC item. When you successfully close a lot manually, the system will automatically bring up the “Open Lot” box with the “Not Active”/Testing” lot listed for that QC item. You will be asked if you wish to open the ‘Nor Active/Testing” lot. If you say “Yes:, you can immediately open the new lot by clicking the “Open Selected lots” box. “Save” your changes. The same will occur when you successfully open a lot manually. The “Close Selected” box will automatically appear and you will be able to click the “Close Selected Lots” box for the current ACTIVE lot.

**Reference:**

SOFT TQC Module Version 10-3.6.5