Completing a Miscellaneous Charge/Credit Form

Purpose

This SOP is to inform customers on how to complete the LifeServe form for miscellaneous charges and/or credits (**LS-FORM-5717**).

Procedure

Step	Action
1	Complete the Customer line using the full facility name.
2	Check the Charge or Credit line depending upon whether a charge needs to be affixed or whether credit needs to be given.
3	Document the date. NOTE: if credit is being requested please include the date of the original invoice number where the charge occurred
4	Document the Product E-code and/or service code
5	Document the quantity.
6	Document the Description of the service that needs to be charged or credited by checking the appropriate line. Note: If Other is checked, please explain the service for charging or crediting. Note: If credit is being requested please provide the original invoice number where the charge occurred, if available.
7	Document the unit number.
8	**If…** / **Then…** No other credits, charges / Proceed to step 9.

		or unit numbers involved	
		Other credits, charges or unit numbers involved	Repeat steps 3 through 7.
9	Document the reason for Charge or Credit by checking the appropriate line. Note: If Other is checked, please document the reason.		
10	Document the ID of the hospital staff completing the form and date		
11	Email the form to is_department@lifeservebloodcenter.org or fax to 1.515.883.3267 Note: email is the preferred method of sending the form.		