Status Active PolicyStat ID 10749943

Beaumont

Origination	11/30/2021
Last Approved	11/30/2021
Effective	11/30/2021
Last Revised	11/30/2021
Next Review	11/30/2023

Document Contact	Colette Kessler: Mgr, Division Laboratory
Area	Laboratory-Chemistry
Applicability	Royal Oak

Inventory Control - Automated Chemistry, Royal Oak

Document Type: Procedure

I. PURPOSE AND OBJECTIVE:

The purpose of this document is to provide the Automated Chemistry Section staff with instructions for receiving inventory.

II. PROCEDURE:

A. **Receive deliveries from In-House Distribution**

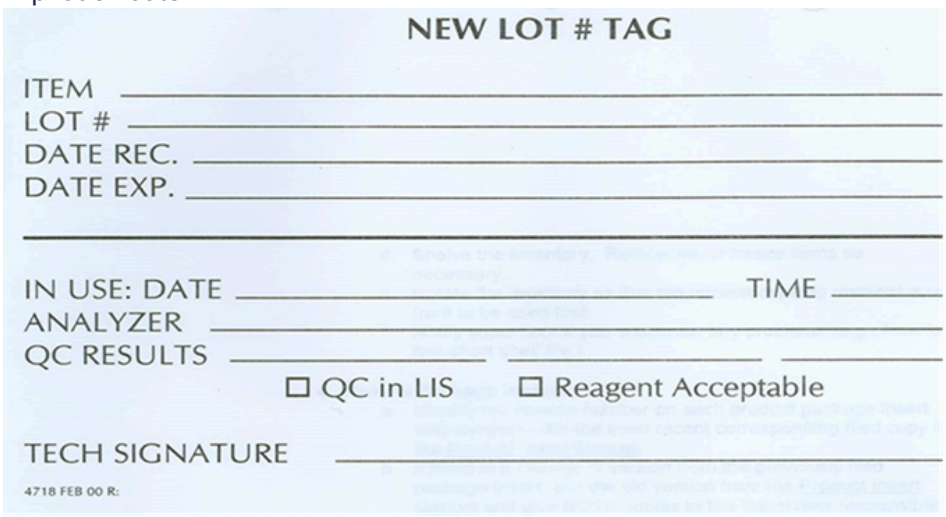
1. Sign receivers with your name and date and return one copy to In-House Distribution delivery person.
2. Check-in the inventory if time and staff are available.
3. Otherwise, deliver inventory to appropriate storage (room temperature, refrigerator or freezer) until it can be checked in.
4. Place receiver on Lab Assistant's desk with a notation where stock can be located, so that it can be checked in.

B. **Check inventory of received deliveries**

1. It is expected that inventory be checked in on the date of arrival.
2. Count and verify on receiver as "OK" for each item of inventory. Note any quantity shortages or back ordered items.
3. Sign and date the verified receiver.
4. Alert the Lab Assistant over inventory of any problems.
5. The Lab Assistants over inventory in Core and STAT Labs are typically responsible to check in inventory. However, the manager may delegate to any Lab Assistant/Tech at the workstation whenever assistance is required, to tag lot numbers, date/receive the items, and shelve stock.

C. **Date and stock received items**

1. Date each item with receipt date, using date gun or special labels.
2. Be aware of any product insert sheets or flags from Manufacturer on stock boxes indicating that there may have been a storage or procedural requirement change. Notify manager immediately in this case.
3. Tag the entire lot received with an inventory *New Lot # Tag*. (See sample below). Note the following on the lot tag:
    a. Item (product name)
    b. Instrument associated with this product
    c. Lot #
    d. Date received
    e. Expiration date


NEW LOT # TAG

ITEM _____
LOT # _____
DATE REC. _____
DATE EXP. _____

IN USE: DATE _____ TIME _____
ANALYZER _____
QC RESULTS _____ _____ _____
☐ QC in LIS ☐ Reagent Acceptable

TECH SIGNATURE _____

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4. Stamp the New Lot # Tag with red "**NEW LOT**" stamp to *differentiate* new lots from new shipments of the current lot # in stock.
5. New lots require Lot-to-Lot comparison before use (See Reagent and Calibration Standards Lot-to-Lot Comparisons).
6. Tape off entire shipment to segregate from other lots in use.
7. Shelve the inventory. Refrigerate or freeze items as necessary.
8. Rotate the inventory so that the earliest expiring material is up front to be used first.
9. Notify manager if you encounter any problems (e.g. new lot has short shelf life, items intended to be frozen were received at room temp, etc.).

D. **Review Package Inserts**

1. Deliver package insert to respective Lead Tech whenever incoming stock is flagged with an alert.
2. Lead Tech will review the product package insert for any changes in storage or procedural requirements.

E. **Lab Assistant, Inventory to reconcile with Purchase Order/Blanket Order Binder**

1. Initial and note item receipt date in the Purchase Order/Blanket Order Binder.
2. File completed receivers.
3. Review Purchase Order Binder weekly for any outstanding orders and investigate delays in receipt.
4. Notify ordering manager of problems (e.g. STAT delays or routine items 2-3 weeks past due).

F. **Evaluate New Lot**

1. New reagent lots/shipments must be evaluated before they are put into use (see Reagent and Calibration Standards Lot-to-Lot Comparisons).

G. **Open New Inventory**

1. Verify the current lot shipment has been depleted.
    a. **REMOVE** the attached *New Lot # Tag* from packaging upon entering a new lot or shipment of product.
    b. Remove all tape from the entire shipment that is ready for use. Verify with "New Lot Ready for Use" sticker
    c. Complete and SIGN the *New Lot # Tag*. Include the following:
        i. In Use Date/Time
        ii. Analyzer
        iii. Quality Control (QC) results where applicable
        iv. Note that QC has been documented in the Laboratory Information System (LIS)
        v. Indicate QC acceptability
        vi. Tech signature

H. **Document Completed Lot Tags**

1. Locate the *Reagent Lot Tag Excel file* for the current year on SharePoint.
2. Document introduction of the new lot or new shipment: Transfer the lot tag data into the corresponding product inventory sheet in the *Reagent Lot Tag Excel file*.
3. Recycle lot tags (recycle bin) that have been documented and checked.

Approval Signatures

Step Description	Approver	Date
Medical Director	Ann Marie Blenc: System Med Dir, Hematopath	11/30/2021
Policy and Forms Steering Committee Approval (if needed)	Colette Kessler: Mgr Laboratory	11/30/2021

Policy and Forms Steering Committee Approval (if needed)	Gail Juleff: Project Mgr Policy	11/30/2021
Lab Chemistry Best Practice Committee	Qian Sun: Tech Dir, Clin Chemistry, Path	11/30/2021
Lab Chemistry Best Practice Committee	Elizabeth Sykes: System Med Dir, Chemistry	11/30/2021
	Colette Kessler: Mgr Laboratory	11/30/2021