

## TRAINING UPDATE

**Lab Location:** GEC, SGAH & WAH  
**Department:** Core

**Date Distributed:** 9/29/2014  
**Due Date:** 10/31/2014  
**Implementation:** 11/1/2014

### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>
<b>Supply Ordering, Receiving and Restocking SGAH.L54, WAH.L52, GEC.L47 v1</b>  <b>Reagent Receipt Log AG.F256.1</b>
<b>Description of change(s):</b>
<p><b>SOP</b> Section 5: Item B.4 - Clarified review of package inserts at time of reagent receipt. Add documentation</p> <p><b>LOG</b> Add column to document pkg insert review</p> <p><b>This revised SOP and log will be implemented on November 1, 2014</b></p>

Document your compliance with this training update by taking the quiz in the MTS system.

**Approved draft for training all sites (version 1)**

Non-Technical SOP

<b>Title</b>	<b>Supply Ordering, Receiving and Restocking</b>	
<b>Prepared by</b>	Robert SanLuis	Date: 8/26/2013
<b>Owner</b>	Robert SanLuis	Date: 8/26/2013

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

<b>Review:</b>		
<b>Print Name</b>	<b>Signature</b>	<b>Date</b>

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### **1. PURPOSE**

This procedure provides instructions for determining inventory levels, ordering and receiving supplies into the laboratory.

### **2. SCOPE**

The procedure includes:

- Method for counting inventory
- Method for ordering supplies
- Receipt Verification
- Restocking of delivered supplies
- Storage Requirements
- Electronic confirmation of receipt of supplies in Stock Clerk

### **3. RESPONSIBILITY**

Staff may be assigned to perform physical inventory, restocking, and storing of supplies within the lab and designated laboratory store rooms.

Designated personnel will be assigned to do the physical inventory, order and receive supplies into the Stock Clerk system.

### **4. DEFINITIONS**

**Stock Clerk:** Software system for ordering and receiving supplies.

**Packing slip:** The shipping document accompanying the supplies, which includes an itemized list of materials pertaining to the contents of a shipment. The slip can be found either the inside or outside of a box.

**Department Past Due List:** This is a report sent out by Chantilly Materials Management department is a daily “Past Due List” Report that indicates supplies that have not been received in Stock Clerk but have been confirmed delivered. The report is emailed to the supervisors and Inventory Control Group Lead for review. The group lead

will use report to make sure all supplies were delivered and to receive all missing receipts high lighted in yellow on spreadsheet.

**PO:** Purchase order number, located on packing slip. It is a 9 digit number always starting with 6710, for example (6710123456).

**Manual Inventory Count Sheets:** A list of all the supplies kept on the laboratories inventory in Stock Clerk.

**Client Supply:** Orders for Materials Management, and Emergency Departments.

**Standing Order:** Orders placed to blanket over a set amount of time, for example 6 months to 12 months. These are reserved for items in which a specific lot is needed for a long duration of time.

**Purchase Requisition in Stock Clerk:** This option is used for items in Stock Clerk that are ordered as needed that are not kept on routine inventory challenge, lot specific, have special notes on them, overnight/ STAT items as well as placing client supply orders.

**Manual Paper Purchase Requisitions:** This is a paper order that will need to be filled out for items that are not available in the Stock Clerk system.

## 5. PROCEDURE

### A. Weekly/Monthly Physical Inventory via Stock Clerk **performed by designated staff only**

#### 1. Weekly/ Monthly Count Process

- a. Log into Stock Clerk
- b. Scroll over to **TRANSACT** located on tool bar
- c. In that window, scroll over to **INVENTORY MANAGEMENT**
- d. To the right a new window will pop up, scroll over to that window to **PHYSICAL INVENTORY**.
- e. A final window will pop up, scroll over and double click over the **MANUAL PI COUNT SHEETS**, and the count sheets screen will pop up.
- f. Once **MANUAL PI COUNT SHEET** page is open, scroll over to the **FACILITY:** box and click on the downward pointing arrow, this will open up a window to select your facilities 3 letter ID. They are indicated below

**Shady Grove Adventist Hospital = EPF**

**Washington Adventist Hospital = EPE**

**Germantown Emergency Center = JAY**

- g. Then scroll over and select the facilities **COST CENTER:** and click on the downward pointing arrow to select the cost center you will need. They are indicated below:

**SGAH-EPF - 6713850**  
**WAH-EPE - 6713825**  
**GEC-JAY - 6713860**

- h. Next click on the **SEARCH** button and count sheets will open up
- i. Finally select **PRINT** and a window will pop up, select your desired printer and click on **PRINT** button.
- j. The Supervisor or Inventory Group Lead will then distribute the count sheets to designated trained staff on Friday of every week, and all counts must be completed and handed in by Noon on every Monday.
- k. The Count Sheets are organized as followed:
  - WAH: locations are organized by bench
  - SGAH: locations are organized by room location
  - GEC: locations are organized by room location

**Notes:**

- When counting the tech must verify the unit of measure is correct the units of measure are designated as: (**EA=Each, CA=Case, CT=Carton, KT=Kit, PK=Pack, GS=Gross, BG=Bag, ST=Set.**) This will be located at the far right side of the manual count sheet, next to where the count is written down.
- To designate a proper count, the rule is, if a box or carton is open it is considered in use and is not counted, this is crucial for proper inventory to be kept. For blood bank antisera, the bottle is counted as 1 if it is  $\geq$  half full and 0 if it is  $<$  half full.
- Blood bank uses a separate sheet for weekly inventory to avoid over ordering of standing items.

2. Inputting Manual Count Sheets **only done by designated staff member**

- a. Log into Stock Clerk
- b. Scroll over to **TRANSACT** located on tool bar
- c. In that window scroll over to **INVENTORY MANAGEMENT**
- d. To the right a new window will pop up, scroll over to that window to **PHYSICAL INVENTORY**.
- e. A final window will pop up, scroll over and double click over the **MANUAL PI COUNT SHEETS**, and the count sheets screen will pop up.
- f. Once **MANUAL PI COUNT SHEET** page is open, scroll over to the **FACILITY:** box and click on the downward pointing arrow, this will open up a window to select your facilities 3 letter ID. They are indicated below

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- g. Then scroll over and select the facilities **COST CENTER:** and click on the downward pointing arrow to select the cost center you will need. They are indicated below:

**SGAH-EPF - 6713850**  
**WAH-EPE - 6713825**  
**GEC-JAY - 6713860**

- h. Next click on the **SEARCH** button and count sheets will open up.
- i. Once opened you will see the cursor blinking in the first line on the right of the screen, match it up with the manual count sheet submitted by staff and input the count. **Note: do not press enter to proceed to next line it will trigger the print prompt.**
- j. To input the next count, you can left click on the next line down with your mouse, press the tab key, or use the arrow down key.
- k. Repeat until all counts are entered.
- l. Once completed select **Save Counts**, you will be prompted with a box that states Save successful the new P/I counts have been saved as account transactions.

### 3. Inventory Group Lead Count Verification

- a. Select **Transact** then **Inventory Management**, then **Physical Inventory**, then **PI Edit Post Transactions**.
- b. The section is named the **Physical Inventory Transaction Report**. Select the appropriate location (EPE, EPF, or JAY)
- c. Once form is loaded select **View**, Sort once on this screen to find the row on the right named "**cf\_cost\_variance.**", then select **ok**.

**Note: This option will organize the Physical Inventory Transaction Report to show the most used items based on total usage and cost. Any items with a cost difference >\$1,000.00 will be recounted and reviewed.**

- d. Once review and recounts have been completed select the **POST** box and Stock Clerk will post counts completing the inventory count and inputting process.

### 4. Ordering via Physical Inventory **performed by designated staff only**

- a. After the counts have been posted select the **Suggested Inventory Report** option. Select appropriate Facility and Cost Center.
- b. Go through each selection and determine if an item needs to be reordered for that week. System will show the last time the item was ordered.
- c. Once desired items are selected for reorder click the box marked **release Created PReqs**.
- d. Click on **Process** button, you will be prompted that the order exceeds your dollar authority and requires approval, choose **ok** and **complete**.
- e. Once all orders are complete, notify Supervisors and Director so orders can be approved via urgent Email.

**Note: This step is critical for timely delivery of supplies.**

## B. Supply Receipt Process

1. When the supplies are delivered, remove the packing slip(s). These may be located:
  - a. On the outside of the box.
  - b. Inside the box of supplies.
2. Verify all of the supplies that are delivered match with the packing slip and check for additional paperwork in each box. Save all paperwork with the packing list.
  - a. Ensure the number and quantity of items is correct.
  - b. If the supplies received match the packing slip, indicate the match by checking off the item line.
  - c. Make any necessary changes on the packing slip, like changing the quantity of an item received. For example, if the packing slip stated 1 of a product was delivered and instead 3 were delivered make a note on the actual packing slip with your initials and date.
  - d. “back ordered” items should be indicated on the slip.
3. Once all of the items have been verified, initial and date the packing slip at the bottom of the page. Place in designated drop box located in the lab.
4. Review the package insert for each reagent received.
  - a. Ensure that the version and revision date of the current package insert (located in the package insert binder) match the version and revision date of the new package insert.
  - b. Document the checking of the package insert revision date by inserting Y or N on the Reagent Receipt Log.
  - c. If the package insert is different, make a copy of the current and new inserts and forward to the technical specialist or supervisor for review and SOP update as necessary.
5. Stamp/ Tag each box with the date and time the supplies were received
  - a. **Blood Bank** – All deliveries are made directly to Blood Bank and are inspected and verified by blood bank staff members per procedure, “Reagent Receipt and Acceptance”.
  - b. **Chemistry** – Each reagent and calibrator box requires an orange “**Do not use this lot**” label which designates the item is a new lot and/or new shipment of existing lot and requires further testing. Rotate new stock behind the old lots stock.
  - c. **Microbiology**
    - 1) Each box of Microbiology plates require an orange “**Do not use this lot**” label.
    - 2) Store refrigerated items in designated locations only
      - At SGAH - in the walk-in refrigerator on designated shelves and record expiration date on the side of each box.
      - At WAH - All new microbiology plates are stocked in the morgue. Obtain the morgue key located on the key ring hanging on the wall in processing. Place items on designated shelves and record expiration date on the side of each box.

- 3) QC forms or other package inserts which are received with the packing slip must be kept and given to the designated Micro tech to file.
  - 4) Any media placed in the laboratory refrigerator requires a “**Do not use this lot**” label, to indicate further testing is necessary before use.
6. Store and shelve the supplies according to requirements, in designated location.
    - a. Frozen items should be stored first, ensuring they are stored at appropriate temperature. There are 2 different freezers at all 3 sites.
    - b. Refrigerated items stored next
    - c. Room temperature supplies are stored last.
  7. Supplies should be shelved / stored to rotate stock, meaning older supplies moved to the front and newer items placed behind.
  8. Allow 18 inches clearance from ceiling when stocking supply shelves. LH750 Diluents cubes, 20L saline cubes, and NERL water boxes may only be stacked a total of 4 each high.
  9. Notify the Supervisor or **Group Lead** staff verbally, that the supplies are ready to be stored and/or shelved.
  10. While restocking a new product, you need to check the expiration dates of the older stock on hand to ensure nothing expired ever gets into use. Dispose of all expired products and notify supervisor and inventory control group lead so counts can be adjusted.
  11. Documentation
    - a. Complete the Reagent Receipt Log with the name, lot number, and receipt information.

Names of Check in Logs:

**SGAH and WAH Check In Logs**

1. Chemistry Reagents A-F Check In Log
2. Chemistry Reagents G-Z Check In Log
3. Calibrator Check In Log
4. Quality Control Check In Log
5. Serology Check In Log
6. Miscellaneous, Chemistry, Hematology, Urinalysis, Coagulation Check In Log
7. Microbiology Media Log In (SGAH: Form posted on Walk In Refrigerator, WAH: Form located in Microbiology Department)

**GEC Check in Logs**

1. Reagent Check-in Logbook I: Chemistry Flexes, Chemistry Calibrators, BNP Calibrators, iSTAT Calibrators
2. Reagent Check In Logbook II: Chemistry Controls, Hematology Controls, Cell Chex, ESR, Coag Controls, Urinalysis Controls, iSTAT controls BNP controls



3. Reagent Check in Logbook III: Serology Kits, Multistix, Urinalysis  
Reagents All iSTAT Cartridges

- b. Write all supplies requiring cross checks and lot to lot verification onto the designated white board located in the lab.

**Special Instruction: (QC Lot Verification) If an unexpected or new QC lot is received, immediately notify the lab's technical specialist, inventory group lead, and supervisor and they will advise you on how to proceed.**

C. Stock Clerk Receipt Process **performed by designated staff only with Stock Clerk access.**

1. Sign on to **Stock Clerk**
2. The next screen will have a menu across the top of the screen.  
Select **TRANSACT**.
  - a. Select **Inventory Management**
  - b. Select **Receiving**
  - c. Select **Receiving Entry**
3. At the **QUERY FOR RECEIVING A PO** screen, type in the **PO number**. The **PO number** is usually indicated in the **CUSTOMER PURCHASE ORDER** box.
  - a. **WAH, SGAH & GEC PO numbers** start with **67100**.
  - b. The list of items ordered under the designated **PO number** will be highlighted in **blue** when you click on the line.
  - c. Place the pointer on the highlighted line and click the mouse twice.
  - d. The items that have not been received will be listed.
  - e. Check the **item number** listed on **the packing slip** against the **Item ID** or the **Catalog# on the screen**.
  - f. Enter the quantity received in the **RECV QTY** space.
  - g. Press **SAVE**
  - h. If the Receipt Confirmation Notes comes up, enter the date the item was received. Tab over to Packing slip # and enter the order reference number, order number, or invoice number.
  - i. If the PO is a standing order, select the correct date the item was received.
4. Select **PRINT RECEIPT SUMMARY REPORT**. Press **OK**
5. Print the report and attach it to the PO.
6. The PO and confirmation will be boxed for storage at Iron Mountain. They are retained onsite for 1 year, then sent for offsite storage for an additional 6 years (total storage 7 years).
7. Repeat for each PO.

D. Purchase Requisition Orders via Stock Clerk by designated staff only

1. Select **Transact, Purchase Requisition**, next prompt click on **new** button
2. This will open the manual purchase requisition screen, you will need the following information
  - facility

- stock clerk number
  - cost center
3. Enter the information in the appropriate fields, then verify the unit of measure is correct to prevent over or under ordering.
  4. If STAT, check the box marked **urgent**.
  5. Click **Release**, when complete.
  6. If order is stat or urgent contact Chantilly's purchasing department to inform them of the order. You will need 13 digit requisition number located in the upper left hand corner of the screen.

#### E. Manual Purchase Orders (paper)

1. Used to order items not available in Stock Clerk system.
2. Complete form with information for the vendor, requester, and item (description, catalog number, quantity and pricing if available)
3. Orders must be approved and signed by the Laboratory manager or above.
4. Fax orders to Chantilly purchasing department. Or submit via email through electronic fax. **PURCHASING FAX Number: 703-802-7050**

#### F. Client Supply Ordering

1. Orders are submitted via email to the Inventory Control Group Lead, and to Laboratory Director
2. Via **Stock Clerk**, access the purchase requisition as described above in section D above.
3. This will open the manual purchase requisition screen, you will need the following information
  - a. Facility (EPE for WAH, EPF for SGAH, JAY for GEC)
  - b. Cost Centers for Client Supplies

6713851 SGAH Client Supply  
6713853 SGAH ER Department  
6713826 WAH Client Supply  
6713861 GEC Client Supply

4. On the Attn line located underneath the facilities address, you must type what department the client supply order is for. (**Examples: SGAH ER DEPT, SGAH MATERIALS MANAGEMENT, WAH ER DEPARTMENT, WAH MATERIALS MANAGEMENT, GEC ER DEPT.**)
5. On the buyers note line you need to type: "**NOT STAT- NOTE ATTN LINE**" (This will mark the order so it will be flagged for the corporate buyer so the order is processed and delivered to the correct department.)
6. In the notes section located underneath the product description: **NOT STAT-NOTE ATTN LINE: (insert desired location)**
7. Mark the order as **STAT** to ensure the attention line is flagged for the buyer.
8. You will need the requisition number located in the upper left hand of the order. It is a 13 digit number that always starts with 67100, for example (67100-xxxxxxxx.)

9. Click **Release** when complete, and then proceed to call the purchasing department in Chantilly to inform them that the order is a client supply order. **PURCHASING Phone Number: 703-802-7120**

6. **RELATED DOCUMENTS**  
Reagent Receipt Log (AG.F256)

7. **REFERENCES**  
None

8. **REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
000	8/21/14	Section 5: Item B.4 - Clarified review of package inserts at time of reagent receipt. Add documentation Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13.	C. Bowman	R. SanLuis

9. **ADDENDA AND APPENDICES**  
None

