

Module 3: Inventory Management

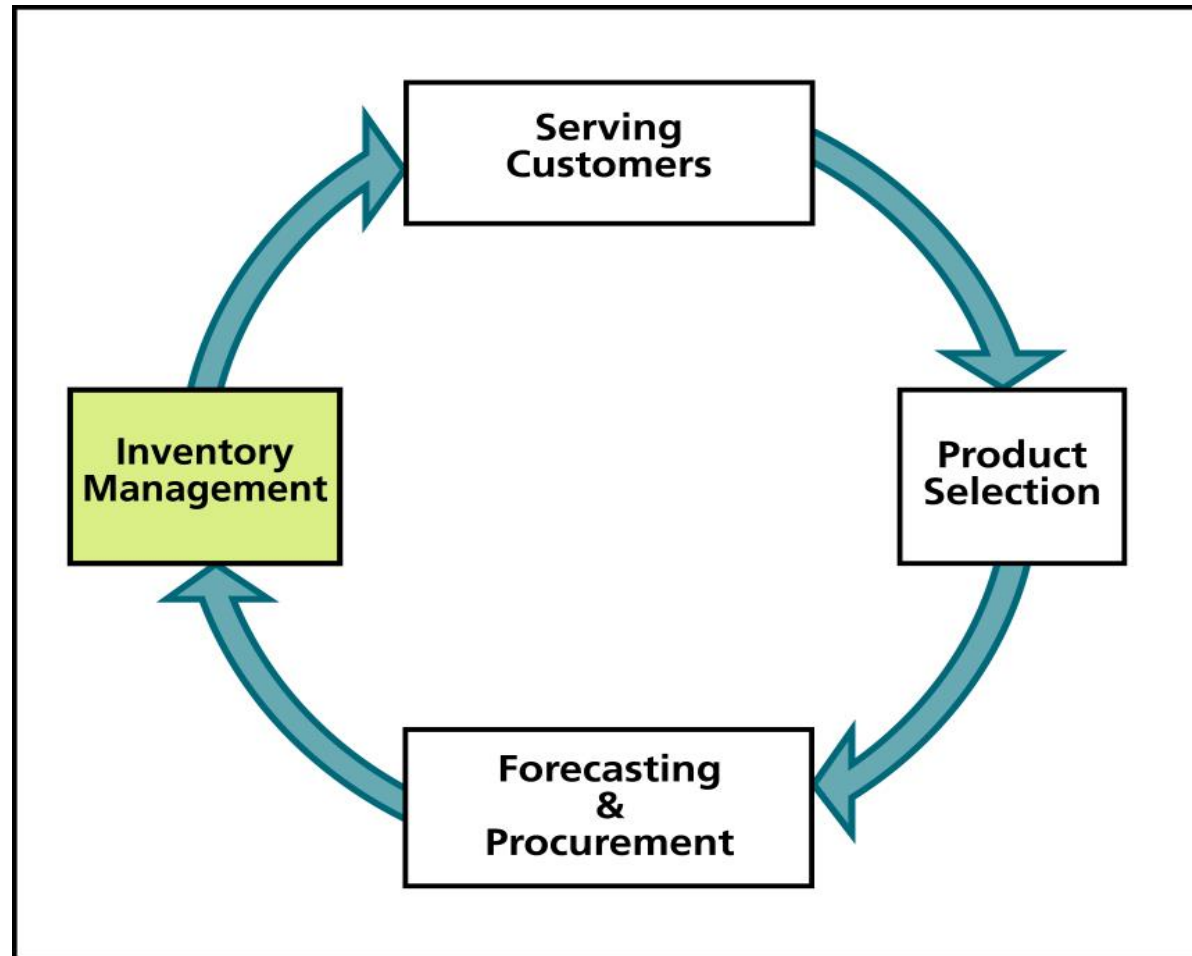
Key Message ...

My lab monitors inventory.

Desired Outcome

- **No over-stocking**
- **No under-stocking**
- **No stock-out**

The Supply Cycle



Inventory Management

The process of receiving, storing and ordering supplies to provide uninterrupted service.



Tasks

- 3.1 - Review inventory log of all equipment and parts
 - Module 5: Creating a Maintenance and QC Log
 - Module 5: Making a Service Call
- 3.3 - Monitor consumption rate and inventory level to determine when and how much to re-order
 - Module 4: Forecasting & Calculating Ordering Amounts

Task

- 3.2 - Review inventory log of all supplies and reagents

Activity: Creating a List of Supplies for a Test

Purpose

To compile a complete inventory list by looking at the total testing process for a given test

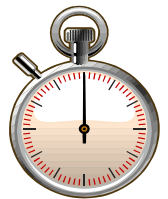
What will you need?

Notepaper and pencil/pen to create your list

What will you do?

Pair up with the person next to you

- Work with your partner to list all the required supplies for a routine urinalysis with microscopy.
- Group the supplies by the testing phases (pre-analytical, analytical, and post analytical).



10 minutes

Tasks

- 3.4 - Enforce good stock management practices
 - Proper storage
 - Stock cycling
 - Inspection of incoming orders
- 3.5 - Inspect quality of existing inventory and dispose of expired test kits, reagents, supplies, and equipment according to policy

Activity: What's Wrong with this Storeroom?

Purpose

To inspect a simulated storeroom and identify areas for improvement

What will you need?

Notepaper and pencil/pen to record issues

What will you do?

Divide into groups of 4-6

- Each group takes turns to examine the storeroom and write down issues observed.



2 minutes

Activity: Did You Receive What You Ordered?

Purpose

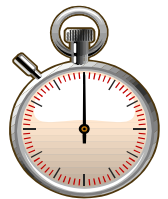
To compare the purchasing document with the shipping invoice and the items received.

What will you need?

Pencil/pen to update the inventory record

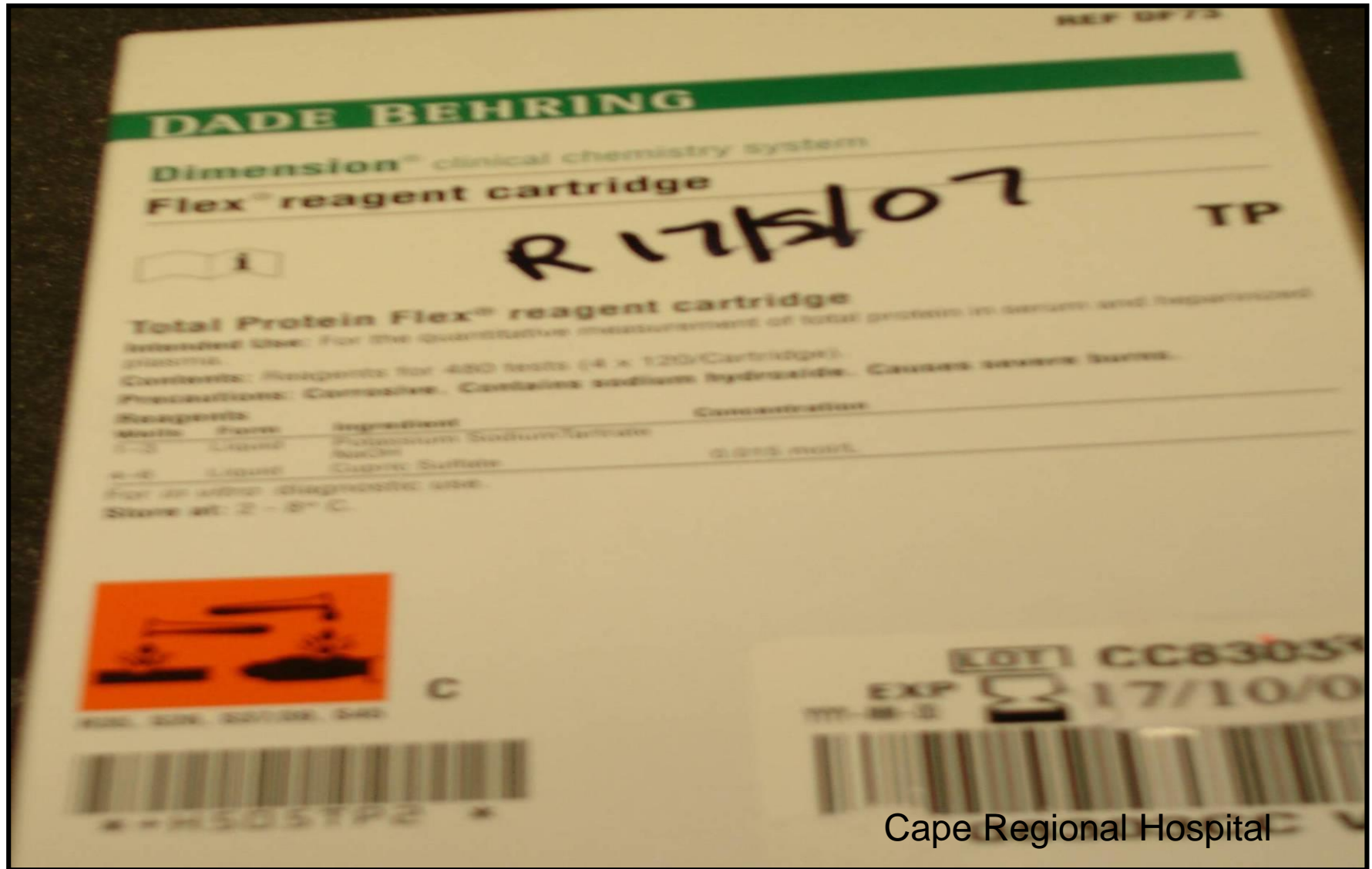
What will you do?

- Read aloud the physical item's description
- Participate in role-plays calling the vendor to reconcile issues
- Update inventory records
- Participate in the classroom's discussion

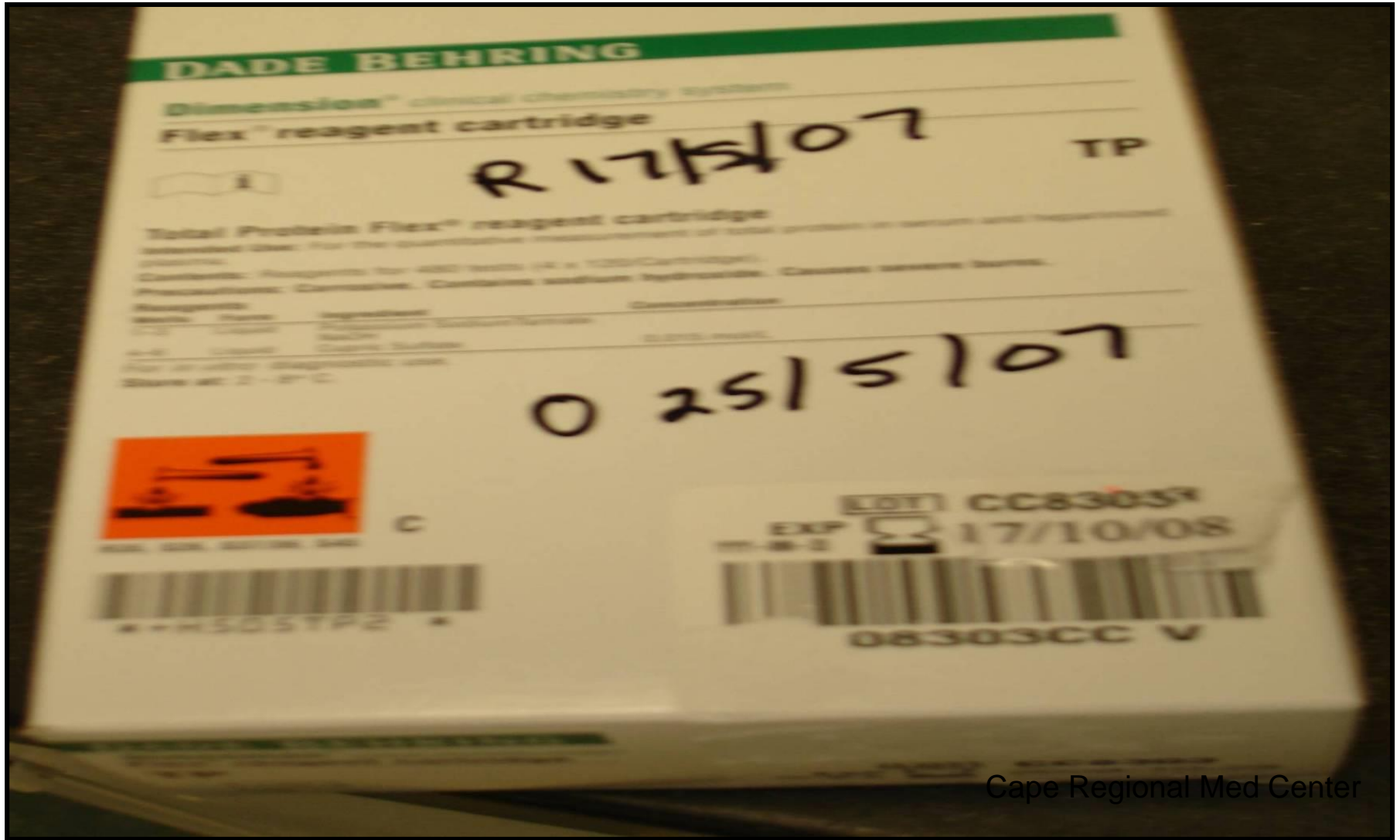


40 minutes

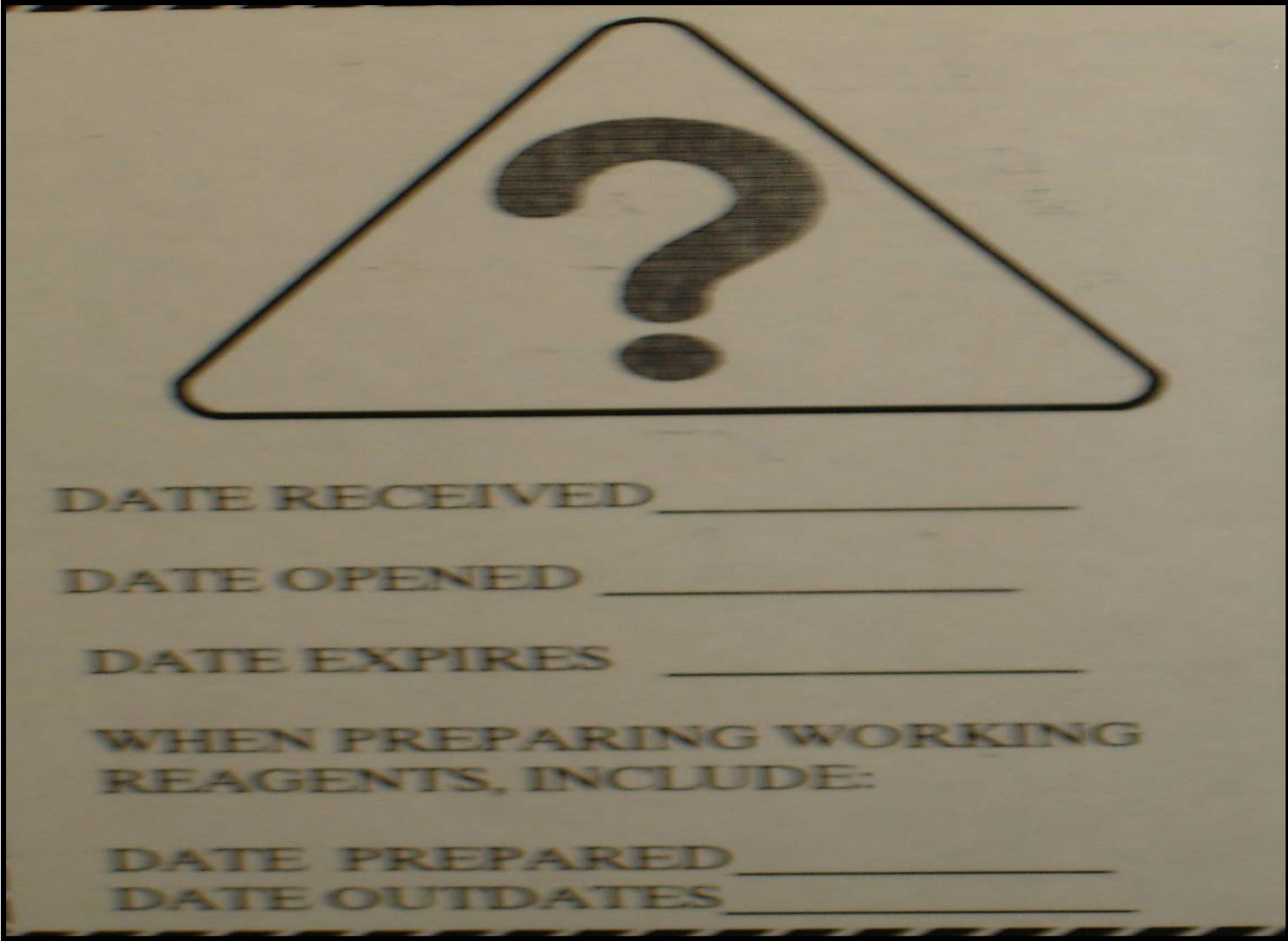
Date of Receipt



Opened Date



Managing Dates



Activity: What Would You Do?

Purpose

To integrate the module's lessons and apply them to the case scenario.

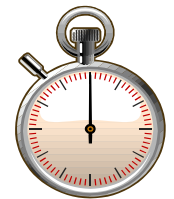
What will you need?

Handout: Case Study Scenarios

What will you do?

Divide into groups of 4-5

- Select a spokesperson for your group
- Formulate specific action steps to address the scenario from the Handout.
- The group's spokesperson presents the proposed steps during the 2 minute class report.



5 minutes

What Would You Do?

You walk into the store room and see six cubes of diluent ready to expire next week. You know from the last order and physical inventory that this should not be the case. When you check the analyzer, you see the diluent currently in-use has an expiration date of six months from now. After reviewing the reagent log, you realize that the lot number with the longer expiration date has been used on the analyzer for the past several months.

- How will you handle the current situation?
- What steps will you take to prevent this situation from reoccurring?
- How will you monitor future inventory cycling of stock to ensure the corrective action is effective?

Tasks

- Review inventory log of all equipment and parts
- Monitor consumption rate and inventory level to determine when and how much to re-order
- Review inventory log of all supplies and reagents
- Enforce good stock management practices
 - Proper storage
 - Stock cycling
 - Inspection of incoming orders
- Inspect quality of existing inventory and dispose of expired test kits, reagents, supplies, and equipment according to policy