Module 4: Procurement Management

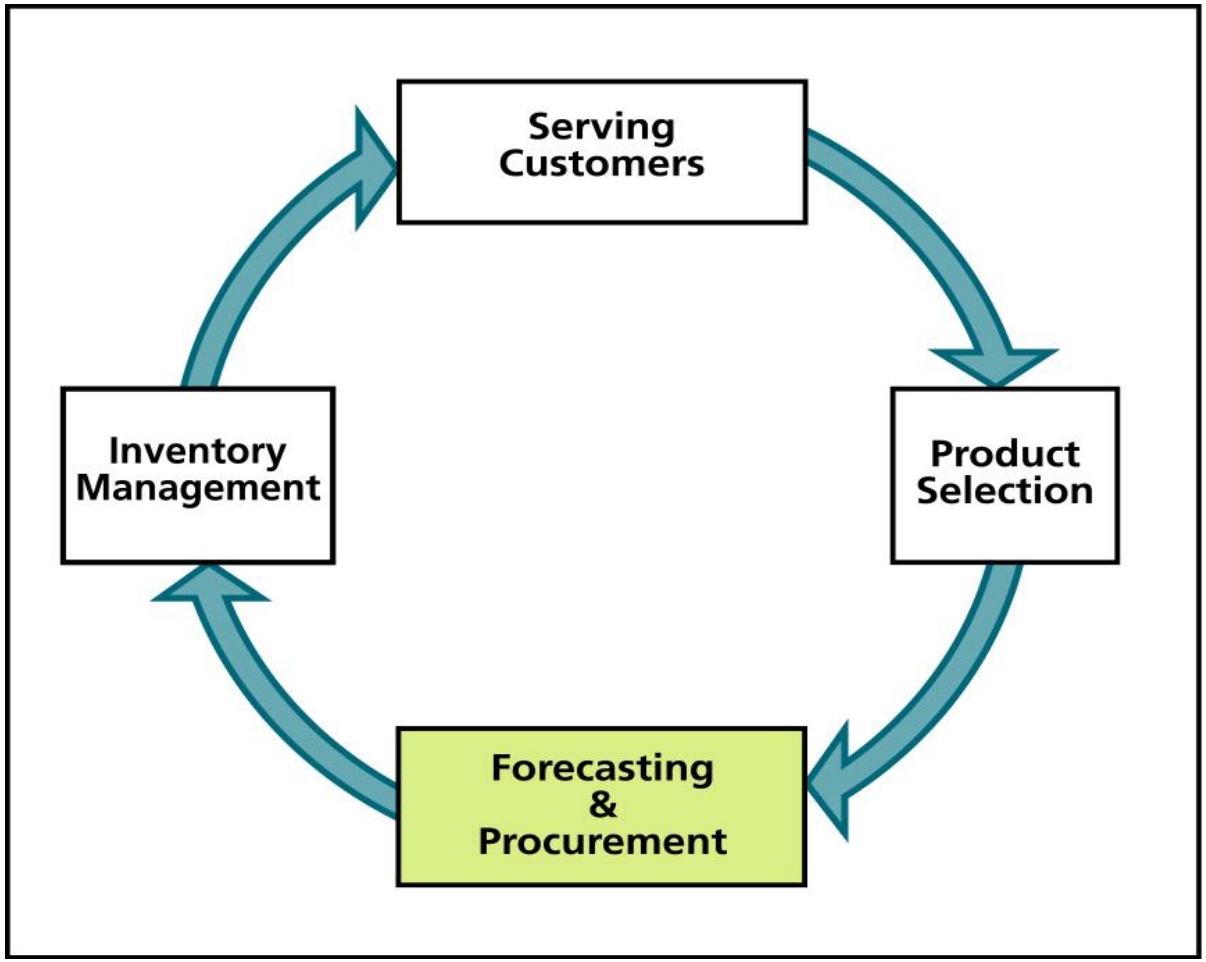
Key Message …

My lab maintains adequate supplies and reagents.

Desired Outcome

Fresh supplies are always available for continuous care.

The Supply Cycle



Remember the Task from Module 3?

- 3.3 - Monitor consumption rate and inventory level to determine when and how much to re-order

Tasks

- 4.1 - Accurately evaluate needs for equipment, supplies, and reagents taking into consideration past patterns, present trends, and future plans
- 4.2 - Place orders as necessary in accordance with needs and budgetary constraints

Ensuring the ‘IN’ and never the ‘OUT OF’ describes your stock.

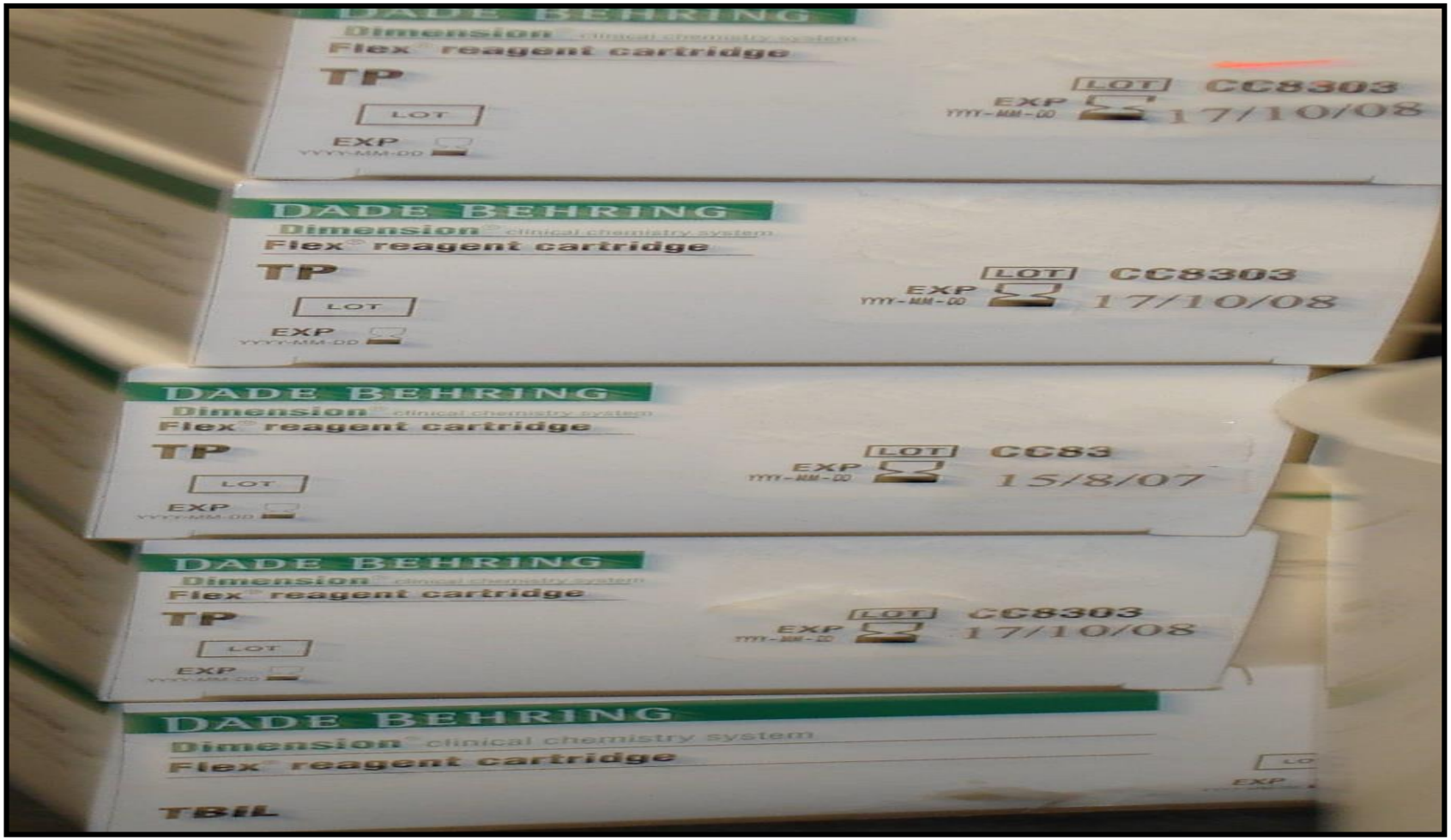
Forecasting and Calculating Ordering Amounts

Perform a "Stock/Inventory Count"

- **What is it?** Physically counting each item in the stock
- **When is it done?** Recommended at the beginning of each month at minimum
- **Who does it?** A designated person

How much on-hand stock is there for total protein?

Stock Count Performed on 6/1/2008



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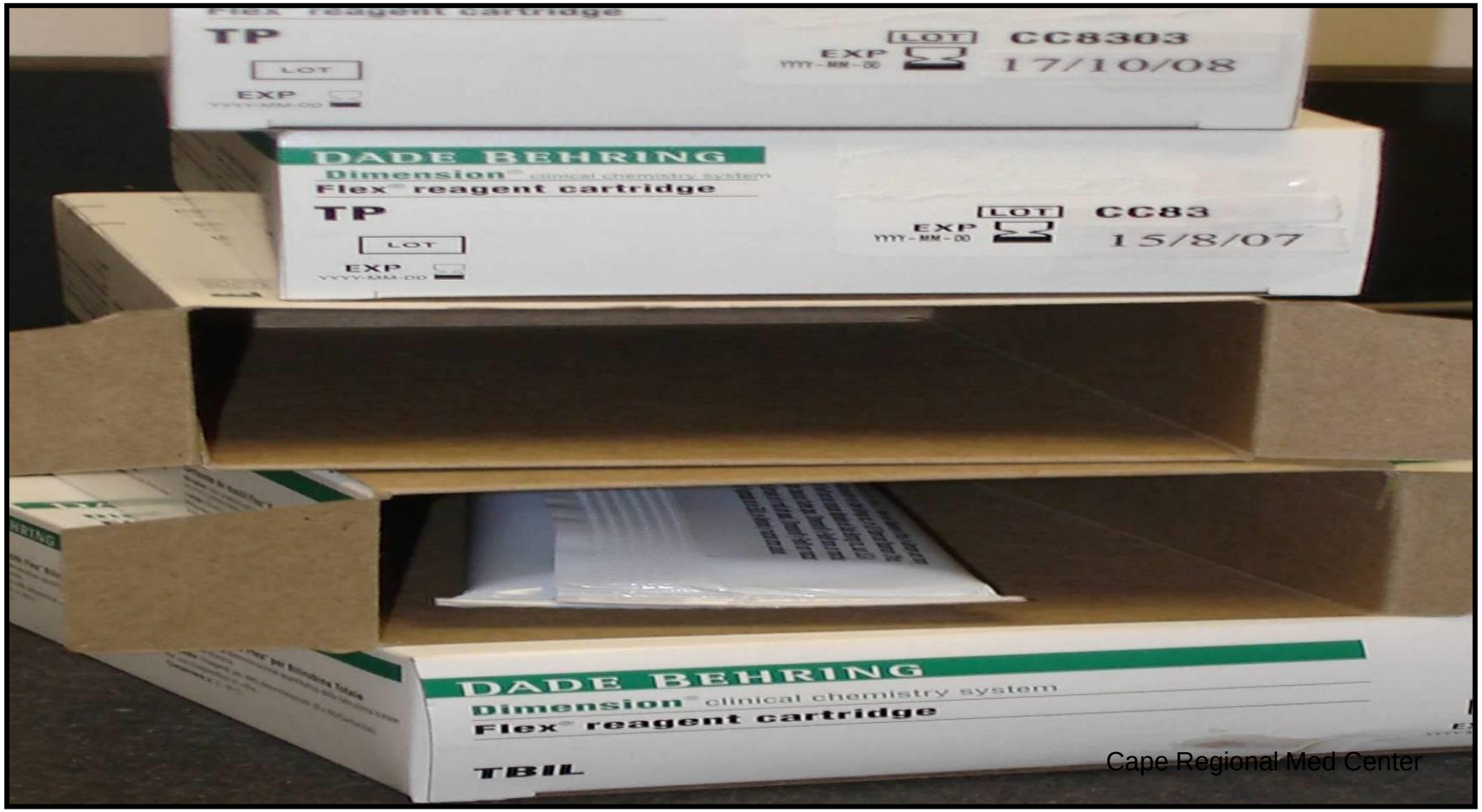
How much is actually there?



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Activity: Forecasting & Calculating Order Amounts

Purpose

To forecast and determine reorder levels and calculate the amount to be ordered

What will you need?

- Job Aid: Calculating Supplies
- Worksheet 1: Urinalysis
- Worksheet 2: Glucometer

What will you do?

- Simple arithmetic used in the Worksheets 1 & 2
- Participate in the classroom's discussion
- Work in groups of 2-3 to complete Worksheet 1
- Complete a 10 minute homework assignment using Worksheet 2 that will be reviewed the next day

15 minutes

Tasks

- 4.3 - Monitor procurement orders
  - Cross-Cutting: Creating a Management Calendar
  - Module 3: Did You Receive What You Ordered?
- 4.4 - Appropriately document and maintain accurate records of all purchase orders and requisitions
  - Module 3: Did You Receive What You Ordered?

Activity: Workstation Set-up

Purpose

To create and organize an efficient and productive workstation using elements developed from each module.

What will you do?

- Participate in the classroom's discussion
- Integrate key concepts from earlier activities

What will you need?

Laboratory Accreditation Preparedness Checklist

15 minutes

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 Handout.
- The group's spokesperson presents the proposed steps during the 2 minute class report.

5 minutes

What Would You Do?

You recently received an inventory order of chemistry reagents. Your current refrigerator is so overcrowded that the controls can barely fit. You are also aware that your facility will extend hours and will add another ART clinic day. In light of these changes, you forecast a significant increase in the amount of reagents that will need to be ordered. This refrigerator will be unable to hold the required inventory. You need management to purchase another refrigerator before the next ordering cycle.

- What information can you provide management that will support your equipment request?
- What steps must you take to purchase this new refrigerator?
- Management explains they do not have available funds. What alternative solutions can you propose to address your upcoming situation?

Tasks

- Accurately evaluate needs for equipment, supplies, and reagents taking into consideration past patterns, present trends, and future plans
- Place orders as necessary in accordance with needs and budgetary constraints
- Monitor procurement orders
- Appropriately document and maintain accurate records of all purchase orders and requisitions