



# Healthcare Supply Chain Management Checklist: Inventory & Procurement

## Demand Forecasting & Planning

Review and validate demand forecasts to ensure accurate inventory levels.

### Historical Demand Data (Units)

### Forecast Revision Date

### Forecast Accuracy Rate (%)

### Forecasting Method Used

- ☐ Simple Average
- ☐ Moving Average
- ☐ Exponential Smoothing
- ☐ Statistical Modeling

### Assumptions & Factors Influencing Forecast

Write something...

### Safety Stock Level (Units)

Enter a number...

## Inventory Levels & Stockouts

Monitor current inventory levels and identify potential stockout risks.

### Current Stock Level (Item A)

Enter a number...

### Reorder Point (Item A)

Enter a number...

### Maximum Stock Level (Item A)

Enter a number...

### Stockout Risk (Item B)

- ☐ Low
- ☐ Medium
- ☐ High

### Last Stockout Date (Item C)

Enter date...

### Days of Supply (Item D)

Enter a number...

### Automated Alerts Enabled?

☐ Yes

☐ No

## Supplier Performance & Contracts

Evaluate supplier reliability, pricing, and adherence to contract terms.

### On-Time Delivery Rate (%)

Enter a number...

### Order Accuracy Rate (%)

Enter a number...

### Response Time to Inquiries (Hours)

Enter a number...

### Contract Expiration Date Status

- ☐ Within 3 Months
- ☐ Within 6 Months
- ☐ Within 9 Months
- ☐ Beyond 9 Months

### Last Contract Renewal Date

Enter date...

### Summary of Recent Performance Review

Write something...

### Supporting Documentation (e.g., Audit Reports)

 Upload File

## Procurement Process Adherence

Verify compliance with established procurement policies and procedures.

### Purchase Order Approval Route Followed?

- ☐ Standard Route
- ☐ Exception Route
- ☐ No Approval Required (Unauthorized)

### Approved Spending Limit (USD)

Enter a number...

### Vendor Contract Used?

- ☐ Yes - Existing Contract
- ☐ No - New Contract Required

### Date of PO Approval

Enter date...

### Required Approvals Received?

- ☐ Department Head
- ☐ Finance
- ☐ Legal
- ☐ Other

### Justification for Deviation (if applicable)

Write something...

## Order Management & Tracking

Monitor order status, delivery timelines, and manage any discrepancies.

### Purchase Order Number

Enter a number...

### Order Placement Date

Enter date...

### Order Status

- ☐ Placed
- ☐ Shipped
- ☐ Received
- ☐ Delayed
- ☐ Cancelled

### Estimated Delivery Date

Enter date...

### Tracking Number

Enter a number...

### Shipping Notes/Instructions

Write something...

### Carrier

- ☐ UPS
- ☐ FedEx
- ☐ USPS
- ☐ Other

### Actual Delivery Date

Enter date...

## Receiving & Inspection

Verify receipt of goods, inspect for damage or defects, and reconcile with purchase orders.

### Purchase Order Number

Enter a number...

### Quantity Received

Enter a number...

### Condition of Packaging

- ☐ Excellent
- ☐ Good
- ☐ Damaged
- ☐ Compromised

### Description of Damage (if any)

Write something...

### Items Missing (if any)

- ☐ Item 1
- ☐ Item 2
- ☐ Item 3

### Upload Photo of Packaging/Items (if damaged)

 Upload File

### Lot Number Verified?

- ☐ Yes
- ☐ No

### Date of Receipt

Enter date...

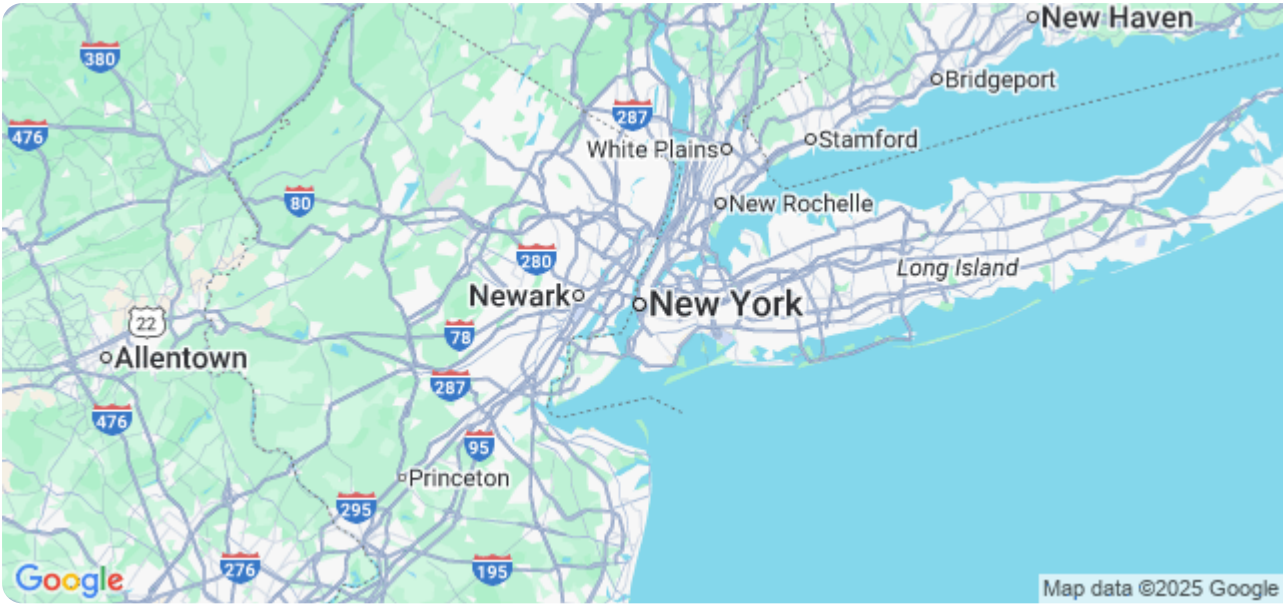
## Storage & Handling

Ensure proper storage conditions, FIFO rotation, and adherence to safety protocols.



Storage Area

 Set My Current Location



Temperature (°C)

Enter a number...

Humidity (%)

Enter a number...

FIFO Rotation Status

- ☐ Compliant
- ☐ Needs Improvement
- ☐ Non-Compliant

Proper Containment Used?

- ☐ Yes
- ☐ No

### Last Inspection Date

Enter date...

### Handling Comments/Observations

Write something...

## Inventory Accuracy & Cycle Counts

Conduct regular cycle counts to maintain accurate inventory records.

### Cycle Count Date

Enter date...

### Item Quantity on Hand

Enter a number...

### System Quantity on Hand

Enter a number...

### Discrepancy Found?

☐ Yes

☐ No

### Quantity Discrepancy (if applicable)

Enter a number...

### Discrepancy Explanation (if applicable)

Write something...

### Resolution Required?

☐ Yes

☐ No

### Resolution Notes

Write something...

### Cycle Counter Signature

## Waste & Obsolescence Management

Identify and manage expired or obsolete inventory items.

### Expiration Date of Item

Enter date...

### Quantity of Expired/Obsolete Item

Enter a number...

### Reason for Obsolescence

- ☐ Product Discontinued
- ☐ Regulatory Change
- ☐ Slow-Moving Item
- ☐ Damage/Defect

### Detailed Description of Waste/Obsolete Item

Write something...

### Supporting Documentation (e.g., Expiration Report)

 Upload File

### Disposal Method

- ☐ Recycling
- ☐ Return to Vendor
- ☐ Secure Disposal
- ☐ Other

### Notes on Disposal (if 'Other' selected)

Write something...

# Security & Access Control

Verify appropriate security measures are in place for inventory storage and access.

## Access Levels Granted (e.g., Admin, Restricted)

- ☐ Admin
- ☐ Restricted
- ☐ Read-Only

## Number of Authorized Personnel

Enter a number...

## Last Access Review Date

Enter date...

## Authentication Method (e.g., Password, Biometric)

- ☐ Password
- ☐ Biometric
- ☐ PIN

## Notes on Access Restrictions or Special Permissions

Write something...