



## QSE 5: Supplier and Inventory Management

Policy	The laboratory purchases and maintains an inventory of equipment, supplies, and reagents used in the path of the laboratory workflow.
Purpose	This policy provides direction for the processes and procedures to effectively work with the Purchasing Department to manage purchase and inventory processes.
Responsibility	<p>The Purchasing Department is responsible for vendor payment and delivery arrangements.</p> <p>The Laboratory Director reviews and approves contract of services to referral laboratories and other services or facilities.</p> <p>The Laboratory Supervisor is responsible for vendor identification, selection, and order processes.</p> <p>The Lead Technologists are responsible for inventory maintenance.</p> <p>The Laboratory Supply Manager is responsible for receiving and storage of inventory.</p>
Selection and Use of Referral Laboratory Services	The laboratory has an established procedure for evaluating and selecting referral laboratories.
Vendor Selection	The laboratory has a system for selecting vendors of equipment, supplies, and services.
Purchasing Supplies and Reagents	The laboratory works with the Purchasing Department to purchase supplies and reagents.
Receiving, Inspecting, Storing, and Managing Supplies and Reagents.	The laboratory has processes and procedures for receiving, inspecting, storing, and managing the inventory of supplies and reagents used in the path of workflow.
Supporting Documents	<p>The following processes support this policy:</p> <ul style="list-style-type: none"> <li>• Use of Referral Laboratory Services</li> <li>• Identifying and Selecting Vendors</li> <li>• Purchasing Supplies and Reagents</li> <li>• Handling Supplies and Reagents</li> </ul>



## Process for Use of Referral Laboratory Services

What Happens	Who's Responsible	Procedures
The laboratory has processes for evaluating and selecting referral laboratories	<ul style="list-style-type: none"> <li>• Laboratory Director</li> <li>• Laboratory Supervisor</li> <li>• Purchasing Department</li> <li>• Referral Laboratory Representatives</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> <li>• Referral Laboratory Test Menu</li> <li>• Laboratory Test Menu</li> </ul>
The laboratory has processes to ensure that the referral laboratory's performance meets all required regulations and standards.	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> </ul>
The laboratory enters into contract with a referral laboratory	<ul style="list-style-type: none"> <li>• Laboratory Director</li> <li>• Laboratory Supervisor</li> <li>• Purchasing Department</li> <li>• Referral Laboratory Representatives</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> <li>• Completing Purchase Orders</li> </ul>
The laboratory maintains a listing of all referral laboratories it uses	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> </ul>
The laboratory maintains a log of all samples sent out to referral laboratories and a record of all tests conducted on each	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> <li>• Specimen Tracking and Handling</li> </ul>
Result reports include the name and address of the referral laboratory and all of the essential elements of the referral laboratory's report without alterations that may impact clinical interpretations	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Use of Referral Laboratories</li> <li>• Result Reporting</li> </ul>



## Process for Identifying and Selecting Vendors for Supplies and Reagents

What Happens	Who's Responsible	Procedures
Inventory lists are created from equipment/methods in use	<ul style="list-style-type: none"> <li>• Lead Technologist</li> </ul>	<ul style="list-style-type: none"> <li>• Test-Specific SOPs</li> <li>• Test Menu</li> <li>• Equipment-Specific Operating Manuals</li> </ul>
Possible vendors are identified and evaluated	<ul style="list-style-type: none"> <li>• Purchasing Department</li> <li>• Laboratory Supervisor</li> </ul>	<ul style="list-style-type: none"> <li>• Purchasing Department Policies and Procedures</li> <li>• List of Approved Vendors</li> </ul>
Vendors are selected	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Quality Manager</li> <li>• Lead Technologists</li> <li>• Purchasing Department</li> </ul>	<ul style="list-style-type: none"> <li>• Purchasing Department Policies and Procedures</li> <li>• List of Approved Vendors</li> </ul>



## Process for Purchasing Supplies and Reagents

What Happens	Who's Responsible	Procedures
Need for purchase of supplies or reagents is identified using inventory lists	<ul style="list-style-type: none"> <li>• Lead Technologist</li> <li>• Laboratory Supply Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Inventory of Supplies and Reagents</li> </ul>
Purchase order is completed	<ul style="list-style-type: none"> <li>• Lead Technologist</li> <li>• Laboratory Supply Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Inventory of Supplies and Reagents</li> <li>• Completing Purchase Orders</li> </ul>
Purchase order is submitted and processed	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Lead Technologist</li> <li>• Laboratory Supply Manager</li> <li>• Purchasing Department</li> </ul>	<ul style="list-style-type: none"> <li>• Completing Purchase Orders</li> <li>• Purchasing Department Procedures</li> <li>• Inventory of Supplies and Reagents</li> </ul>



## Process for Handling Supplies and Reagents

What Happens	Who's Responsible	Procedures
Supplies and reagents are received in the facility	<ul style="list-style-type: none"> <li>• Facility Receiving Department</li> </ul>	<ul style="list-style-type: none"> <li>• Facility Receiving Department Procedures</li> </ul>
Supplies and reagents are received in the laboratory	<ul style="list-style-type: none"> <li>• Quality Manager</li> <li>• Laboratory Supply Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> </ul>
Received supplies/reagents are documented on inventory	<ul style="list-style-type: none"> <li>• Laboratory Supply Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> <li>• Inventory of Supplies/Reagents</li> </ul>
Acceptability of reagents/supplies is determined	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Quality Manager</li> <li>• Laboratory Supply Manager</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> <li>• Quality Control of Supplies and Reagents</li> <li>• Parallel Testing</li> </ul>
Unacceptable reagents/supplies are handled	<ul style="list-style-type: none"> <li>• Laboratory Supervisor</li> <li>• Quality Manager</li> <li>• Laboratory Supply Manager</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> <li>• Quality Control of Supplies and Reagents</li> </ul>
Acceptable supplies and reagents are labeled and stored for future use	<ul style="list-style-type: none"> <li>• Quality Manager</li> <li>• Laboratory Supply Manager</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> <li>• Inventory of Supplies/Reagents</li> </ul>
Supplies and reagents are put in use	<ul style="list-style-type: none"> <li>• Quality Manager</li> <li>• Laboratory Supply Manager</li> <li>• Technicians/Technologists</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving Supplies and Reagents in the Laboratory</li> <li>• Inventory of Supplies/Reagents</li> <li>• Test-Specific SOPs</li> </ul>