

A clearer stock picture.

A practical guide to laboratory inventory and purchasing handovers.

First edition · 2026 · Free to share with your team

Use this guide alongside your laboratory's approved procedures, supplier storage instructions and local requirements. It covers operational records, not clinical decisions.

01 / RECEIVING STOCK

Start with a record you can follow.

Check the delivery against the order before recording it as available. Keep the item, batch and expiry information together so another person can identify the same stock later.

- Record the item name, supplier, quantity and unit of measure.
- Capture batch or lot numbers, expiry dates, receipt date and storage location.
- Check condition and storage requirements using your approved receiving procedure.
- Record discrepancies and hold unsuitable stock for the appropriate review.

Before you finish: could a colleague find the delivery, identify its batch and understand any hold or discrepancy from the record alone?

02 / DAILY REVIEW

Make the next stock decision visible.

A short review is most useful when it ends with an owner and a next step. Look at the stock needed for scheduled work, usable batches and outstanding deliveries.

- Review low-stock items against expected work and supplier lead times.
- Check approaching expiry dates and any quarantined or recalled batches.
- Identify unresolved adjustments, waste or usage not yet recorded.
- Assign an owner to each issue and record when it needs a follow-up.

Use the batch-selection method in your laboratory's procedure. Do not assume the oldest receipt and the earliest expiry always refer to the same batch.

03 / STOCK COUNTS

Resolve a difference before changing the number.

A shelf count and a system record can disagree for several reasons: timing, units, unlogged usage, a misplaced batch or an actual loss. A clear reconciliation records which explanation applies.

1. Define the count scope, location and cut-off time.
2. Count by batch and unit, keeping held stock separate from usable stock.
3. Review receipts, usage and adjustments around the cut-off.
4. Recount significant differences and follow the approval procedure for adjustments.
5. Record the reason, reviewer and action taken.

Watch the units: a box, vial and millilitre are different quantities. Keep conversions explicit.

04 / PURCHASING

Give the approver enough context.

A useful purchase request explains what is needed and why. Connect the request to usable stock, expected demand and any existing order before asking for approval.

- Identify the exact item, requested quantity and unit.
- State the need-by date and the operational reason.
- Check open orders to avoid ordering the same stock twice.
- Include the supplier quotation, delivery terms and relevant budget.
- Follow your laboratory's approval rules before placing the order.

When the order is received, link the receipt back to the request and record any outstanding quantity.

05 / SHIFT HANDOVER

Leave a clear starting point for the next person.

Keep the handover short enough to read and specific enough to act on. Include stock risks, unresolved delivery issues and requests waiting for a decision.

A simple handover format

Item & batch	Which stock or order needs attention?
Current position	What is available, held or still expected?
Next action	What needs to happen, and by when?
Owner	Who is following it up?
Record	Where can the next person find the supporting information?

Keep patient information and other confidential details out of shared operational handovers unless your approved process requires them and controls access appropriately.