

Medication Inventory Management for Hospitals and Healthcare Facilities

Hospitals and healthcare facilities maintain various types of medications, vaccines, and supplies (collectively referred to as “medication inventory” in this checklist) depending on their patient populations and the services they provide. Regardless of the scale of an organization’s medication inventory, functional, well-maintained, and well-documented systems and processes are necessary to prevent errors and ensure patient safety.

Systems and processes should account for issues related to medication storage, security, documentation, and safety processes and auditing. The following checklist is intended to help hospitals and healthcare facilities evaluate whether they have implemented appropriate safeguards for managing their medication inventories. The tool may prove useful for identifying best practices already in place as well as areas for improvement.

| | Yes | No |
|---|--------------------------|--------------------------|
| <i>Storage</i> | | |
| Do medication storage areas have adequate space to accommodate the inventory without being cramped? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are medication and supply storage areas well-lit and temperature controlled? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are medications, vaccines, and products that require refrigeration or freezing stored at the appropriate temperatures (per manufacturers’ guidance) in purpose-built storage units? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
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| <i>Storage (continued)</i> | | |
| Do refrigerators and freezers that store medication inventory have temperature monitoring devices that are monitored according to Centers for Disease Control & Prevention (CDC) guidance ? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are staff members prohibited from storing any other items (e.g., food and beverages) in refrigerators and freezers used for medication inventory storage? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are efforts made to protect the power supply to medication storage units (e.g., plugging in only one storage unit per outlet, using safety lock plugs or outlet covers, and posting “Do Not Unplug” warning signs to alert staff, the cleaning crew, electricians, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization have a procedure for handling temperature excursions, and are staff members trained to identify excursions quickly and take action? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do your organization’s emergency preparedness plans include protocols for protecting the medication inventory during an emergency (e.g., power loss, flooding, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are staff members trained on medication inventory storage and handling protocols, including emergency procedures? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are controlled substances, high-alert drugs, and vaccines kept separate from each other and the rest of the medication inventory? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are products shelved with their labels facing forward for easy identification? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are products in the inventory separated if they (a) have names that sound similar, (b) have similar packaging, or (c) are the same product but have different routes of administration? | <input type="checkbox"/> | <input type="checkbox"/> |
| When new medications are added to the inventory, are they compared with the existing inventory to identify potential “look-alike, sound-alike” issues? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are storage trays/bins/containers clearly labeled, and do they each hold only one type of product? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
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| Storage (continued) | | |
| Does your organization’s medication inventory storage method account for which medications need to be used first based on expiration date? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization have adequate numbers of automated dispensing cabinets (ADCs) that are easily accessible to appropriate staff? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is ADC inventory determined based on patient needs, prescribing patterns, utilization, and safety considerations? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is ADC inventory reviewed and replenished on a routine basis? | <input type="checkbox"/> | <input type="checkbox"/> |
| Security | | |
| Has your hospital or healthcare facility established specific and measurable procedures to safeguard the medication inventory? | <input type="checkbox"/> | <input type="checkbox"/> |
| Has your organization implemented policies, procedures, and security safeguards to prevent drug diversion ? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are all medication storage areas locked to control access? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are controlled substances, high-alert medications, syringes, needles, and prescription pads kept in restricted areas? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is access to restricted areas limited to designated and appropriately trained and credentialed staff members? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization limit the number of people authorized to order controlled substances? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is a policy in place that assigns separate accountability for ordering and receiving controlled substances? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization have a requirement that at least two individuals validate and provide signatures/dates confirming that received orders of controlled substances match invoices and documentation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are security processes in place to prevent unauthorized access to ADCs? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|---|--------------------------|--------------------------|
| Security (continued) | | |
| Do staff members comply with all policies for witnessing and wasting narcotics? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do staff members take precautions to prevent the unauthorized use of discarded medications? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are nonpharmacy personnel prohibited from entering the pharmacy when it's closed? | <input type="checkbox"/> | <input type="checkbox"/> |
| Documentation | | |
| Does your hospital or healthcare facility have detailed guidance and written policies for logging, storing, and monitoring the medication inventory? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are accurate and detailed records kept for all medications that are prepared and dispensed? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are medication storage unit temperatures documented according to CDC guidance and your organization's prescribed frequency? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization maintain an accurate, current list of its high-alert medications and products with potential "look-alike, sound-alike" issues? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are "look-alike, sound-alike" issues communicated to practitioners and appropriate staff members routinely and when new products are introduced into the inventory? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are all medications prepared onsite labeled correctly and consistently? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are pediatric and adult versions of the same medication or vaccine labeled clearly to avoid confusion? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do all dispensed medications have detailed labels that include the drug name, patient name, date, strength, dosage, frequency, quantity, and expiration date? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are all medication containers (e.g., syringes, bowls, vials) that are taken to patient care areas labeled with the medication name and strength/concentration? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|---|--------------------------|--------------------------|
| <i>Documentation (continued)</i> | | |
| Are warning or label enhancements used for medications with problematic names or packaging? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are multidose vials labeled with an open date and properly discarded according to manufacturers' requirements? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is all staff training related to medication inventory storage and handling, including training on emergency procedures, documented in employees' personnel files? | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Safety Processes and Auditing</i> | | |
| Does your organization's medication inventory management system help detect low inventory levels for ordering purposes and to alert staff about possible medication and supply shortages? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are providers aware of any mandatory inventory reporting requirements related to medications or vaccines? | <input type="checkbox"/> | <input type="checkbox"/> |
| In the event of medication or supply shortages, is a process in place to identify the safest alternatives and educate practitioners about the products? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your organization utilize barcode medication administration (BCMA) as part of its inventory control system? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are medication inventories in the pharmacy and patient care areas routinely audited to verify inventory, remove expired/discontinued products, and identify issues such as mislabeling? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are controlled substances routinely audited, and are staff members aware of the appropriate procedures for reporting loss or theft of drugs to appropriate local, state, and federal authorities? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are BCMA processes and logs audited for compliance and to identify system gaps and barriers? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|--|--------------------------|--------------------------|
| <i>Safety Processes and Auditing (continued)</i> | | |
| Are override reports from ADCs reviewed regularly to identify inappropriate overrides? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are expired medications and products removed from the inventory and disposed of according to drug class and local/state regulations? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the process for discarding expired medications prevent unauthorized access to these items? | <input type="checkbox"/> | <input type="checkbox"/> |

Resources

For additional information and more detailed guidance on medication safety and inventory management, visit the [Institute for Safe Medication Practices](#) for a variety of tools and resources. Additionally, see the CDC's [Vaccines and Immunizations](#) webpage for recommendations related to vaccine storage and handling.

This document does not constitute legal or medical advice and should not be construed as rules or establishing a standard of care. Because the facts applicable to your situation may vary, or the laws applicable in your jurisdiction may differ, please contact your attorney or other professional advisors if you have any questions related to your legal or medical obligations or rights, state or federal laws, contract interpretation, or other legal questions.

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