

Medication Inventory Management for Healthcare Practices

Healthcare practices 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. Some offices have minimal medication inventories (due to limited demand, state regulations, or other factors), while others maintain substantial inventories.

Regardless of the scale of a healthcare practice’s medication inventory, functional, well-maintained, and well-documented systems and processes are necessary to ensure patient safety and prevent errors. These systems and processes should account for issues related to storage, security, documentation, and safety processes and auditing.

The following checklist, intended for healthcare practices, offers strategies to address key safety precautions for medication inventory management as well as opportunities to identify areas for improvement.

	Yes	No
Storage		
Is a designated staff member responsible for ensuring that the practice’s medication storage areas are organized and maintained?	<input type="checkbox"/>	<input type="checkbox"/>
Do medication storage areas have adequate space to accommodate the inventory without being cramped?	<input type="checkbox"/>	<input type="checkbox"/>
Are medication storage areas well-lit and temperature controlled?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
<i>Storage (continued)</i>		
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"/>
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 practice 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 practice's emergency preparedness plans include protocols for protecting the medication inventory during an emergency (e.g., power loss, flooding, etc.), including protocols for handling emergencies outside of standard business hours?	<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 medication samples, 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"/>
As much as possible, are products shelved at eye level 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"/>

	Yes	No
Storage (continued)		
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"/>
Does your practice’s medication inventory storage method account for which products need to be used first based on expiration date?	<input type="checkbox"/>	<input type="checkbox"/>
Security		
Has your practice established specific and measurable procedures to safeguard the medication inventory?	<input type="checkbox"/>	<input type="checkbox"/>
Are all medication storage areas, including the cabinet or closet for samples, kept locked?	<input type="checkbox"/>	<input type="checkbox"/>
Are controlled substances, high-alert medications, syringes, needles, and prescription pads secured 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"/>
Do staff members take precautions to prevent the unauthorized use of discarded medications?	<input type="checkbox"/>	<input type="checkbox"/>
Is your facility manager and/or building security team aware of your after-hours emergency response protocol, and do designated staff members know the appropriate procedures for accessing the building after hours?	<input type="checkbox"/>	<input type="checkbox"/>
Documentation		
Does your practice have detailed guidance and written policies for logging, storing, and monitoring the medication inventory (including samples)?	<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"/>

	Yes	No
<i>Documentation (continued)</i>		
Does your practice 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 pediatric and adult versions of the same medication or vaccine labeled clearly to avoid confusion?	<input type="checkbox"/>	<input type="checkbox"/>
When medications and samples are received, administered, or dispensed, is all pertinent information documented electronically or in hard copy? ¹	<input type="checkbox"/>	<input type="checkbox"/>
Do healthcare providers in the practice document the provision of samples in patients’ health records?	<input type="checkbox"/>	<input type="checkbox"/>
Does the practice have a process for tracking patients on high-risk medications and documenting their dosages, prescriptions, refills, and lab orders/results?	<input type="checkbox"/>	<input type="checkbox"/>
Do all dispensed medications (including samples) have detailed labels that include the drug name, patient’s name, date, strength, dosage, frequency, quantity, and expiration date?	<input type="checkbox"/>	<input type="checkbox"/>
Are warning or label enhancements used for products with potentially confusing 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"/>

¹ Documentation should include, as applicable, the name of the drug/product; the date it was received, administered, or dispensed; the patient’s name; the quantity; the manufacturer and lot number; and the healthcare provider’s name.

	Yes	No
Safety Processes and Auditing		
Are procedures in place for interacting with pharmaceutical representatives and accepting sample medications?	<input type="checkbox"/>	<input type="checkbox"/>
If your practice has a medication inventory management system, does it 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"/>
Has your practice designated a staff member to routinely audit the medication inventory for expired items, including items kept in procedural areas and exam rooms?	<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 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"/>

Resources

For additional information and more detailed guidance about 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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