Unit 205  Order, receive and store pharmaceutical stock

**Element 1**  Order pharmaceutical stock
**Element 2**  Receive pharmaceutical stock
**Element 3**  Store pharmaceutical stock
Unit 205  Order, receive and store pharmaceutical stock

Element 1  Order pharmaceutical stock
Element 2  Receive pharmaceutical stock
Element 3  Store pharmaceutical stock

Background

The stores, distribution and purchasing area of any pharmacy is central to the workings of the whole department. This is where the supply of medicines for the whole organisation and its patients are ordered, and where the stock is received and stored, ready to send out to hospital wards, hospital departments and internal pharmacy work areas.

It is important that the correct medicine is always in stock when needed for patients. Not having the stock of a medicine and not being able to supply this for patients could affect their treatment and well being.

It is also important that the stock held is in good condition and that it has been stored in the right storage conditions so as not to affect its suitability for patient use. Medicines need to be stored at certain temperatures; in the refrigerator for instance. Some medicines need to be stored separately due to their chemical properties; industrial methylated spirits is an example, as this product is inflammable and a fire risk and needs to be stored in an isolated and ventilated area.

Storing stock in the wrong storage conditions could result in the medicine being weaker or stronger in strength. Either way, this could have a disastrous effect on the patients receiving this medicine, as they would be given the wrong strength and dose of their medicines.

The patients can also expect that the medicines supplied to them have not expired or past their "use by date" as this may also affect the strength of a medicine. Some medicines have a very short shelf life and it is important that this is recognised so that wastage of medicines can be kept to a minimum. It is important to use the short dated stock first to ensure that stock is being supplied and used in turn. This is called stock rotation and stock maintenance is a major part of working in the stores area.

Ensuring that stock is maintained in good condition and rotated according to its shelf life is an essential part of providing an efficient and cost effective service, as every organisation spends a vast amount of its annual budget on medicines for patients.

Correct levels of stock holding need to be carefully calculated and reviewed to ensure that there is neither 'too much' nor 'too little' stock stored on the shelf. The level of stock needs to be a balance between what needs to be ready for supply for the patients and the amount of money that is tied up in the stock holding.

It is also important that stock is stored in a systematic manner. Each store will have its own layout for storing stock and will have a stock location plan. This is essential so that all staff can locate stock quickly and efficiently, especially if a medicine is required urgently.

Therefore, it is essential that when putting stock on the shelf, either if it has been returned from the wards or departments or if it has been received and unpacked from the suppliers or manufacturers, that it is stored in the correct location.
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The stores area is also where all purchased and ordered stock is delivered to the pharmacy department. When the stock is unpacked it is important to check that the correct medicines, correct pack size, strength and quantity have been sent by the supplier, and that it is in good condition. Wrongly sent or damaged stock could result in a delay to the patients’ treatment and could also incur a cost to the department. When unpacking deliveries it is essential that goods and medicines are checked into the department correctly according to the supplier's delivery note and the original pharmacy order.

The person responsible for purchasing pharmacy stock should be informed of any discrepancies in delivered orders. This will enable the goods to be changed or a new supply ordered promptly.

The procurement team will also be responsible for negotiating contracts with suppliers. This allows the organisation to receive larger discounts on goods by committing to an agreed level of purchases to the supplier. These contracts are legally binding agreements between the organisation and the supplier. Contracts may change annually and this will alter the suppliers of stock, which will alter the appearance and possibly the pack size of medicines. Some pharmacy stock will come direct from the manufacturer and some will come from a wholesaler who holds a large quantity of stock, ready to supply on the same working day.

Staff working in stores and distribution are responsible for ensuring the correct receipt of stock, maintaining stock by ensuring good stock rotation and stock control, and that stock is stored in the correct location under the necessary conditions.

Staff are also responsible for ensuring that minimum levels of stock are available and that more stock is ordered as required.

Each ward holds its own supply of regularly used medicines that can be used for more than one patient. This is known as "stock". Many hospital pharmacies operate a top-up system to replenish this stock, providing a reliable and efficient service that accurately reflects the needs of the ward.

Top-up (service)

This is where pharmacy staff identify the stock needs of a ward or department and replenish the stock. An efficient system is important to maintain the smooth running of both the ward and the pharmacy. Running out of stock items can lead to patients missing doses and be disruptive to the wards and pharmacy.

The top-up system will also help to reduce wastage by ensuring that cupboards are not overstocked with unused items, and making sure expiry dates are monitored and that drugs are stored in appropriate conditions. The top-up pharmacy assistant visits the wards and departments on a pre-determined day according to the top-up rota, at a time convenient for the ward and the pharmacy department.

The ward stock list is made up of regularly used items and is agreed by the ward pharmacist, top-up pharmacy technician/pharmacy assistant and ward staff. This team reviews the stock list regularly and each item is assigned a stock level (or quantity) to ensure that the ward has sufficient stock to meet its needs.

As part of your role as a top-up pharmacy assistant you will be responsible for ordering and supplying sufficient stock that the ward will require for a set period of time. It is very important to ensure that the stock levels are correct, as insufficient stock may cause the patients treatment to be affected and cause the nursing staff to leave the ward unnecessarily to collect more stock from the pharmacy.
### Key words and concepts

These definitions are provided to explain how key words and concepts are used in this unit.

<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
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<tbody>
<tr>
<td><strong>Standard Operating Procedures</strong></td>
<td>these are referred to as SOPs and include written protocols or procedures. They state the way your organisation requires tasks to be carried out to ensure a quality pharmacy service is provided, this would include, for example how you should order stock, when stock should be ordered and where it should be stored.</td>
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<td><strong>Stock rotation</strong></td>
<td>this is the process of ensuring the shortest dated stock is used first, care must be taken when receiving, storing or issuing stock.</td>
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<tr>
<td><strong>Special Orders</strong></td>
<td>these include special orders for customers, named patient drugs, clinical trials stock.</td>
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<tr>
<td><strong>Health and Safety</strong></td>
<td>this includes correct moving and handling procedures, safe handling of stock, safe storage of stock and COSHH regulations.</td>
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Knowledge and Understanding

You must show that you know and understand:

For the whole unit

K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

K2 The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.

K3 The importance of maintaining correct accurate documentation.

K4 The different formulation of drugs and why it is important to use the correct formulation and strength.

K5 The difference between branded and generic drugs.

K6 The relevant Health and Safety requirements in respect to the storage and issuing of stock including manual handling.

Reduce risks

K7 The sources and suppliers of stock.

K8 Ordering SOPs and why they are implemented.

Receive stock

K9 Why expiry dates are important.

K10 The importance of only receiving goods identified on the delivery note and to check this against the original order.

K11 The procedures for dealing with damaged or incomplete or incorrect deliveries.

Store stock

K12 The storage requirements for different types of products and why they are important.

K13 The principles of stock rotation.

K14 The signs to look for and how to handle products that are damaged, contaminated or deteriorated.

K15 What to do with out dated or short dated stock.

K16 The importance of maintaining storage areas in good condition.
Activities

1. Find out where your procedures for ordering, receiving and storing pharmaceutical stock are kept. Read the procedures and discuss the important points with your Trainer/Assessor.

2. Draw a 'family tree' and add in the names of all the staff in your stores area. Record and describe the job titles of all the staff identified on the 'family tree'.

3. Discuss with your Trainer/Assessor your role, your limits and responsibilities. Identify and record who you should refer to if you need advice, help or guidance on any part of your work.

4. Draw a map of the layout of the stores and any other areas outside the main department for storing stock.

5. Find out about the different forms of medicines that are found in your store. Describe to your Trainer/Assessor how the different medicine forms are used.

6. Find out about the systems used in your stores that identify the need to order more stock, how to issue stock, how to receive stock and how to book out stock.

7. Discuss with your Trainer/Assessor the times of the day that orders need to be processed by to ensure timely delivery. Describe the difference between a wholesale order and a direct order.

8. Find out the different sources of suppliers that you use for your pharmacy purchasing. Identify your main wholesaler supplier(s). Identify the main delivery times of your wholesale supplier(s).

9. Ask your Trainer/Assessor to observe you carrying out the process of accepting an order into the stores area from a supplier. Discuss the details that must be checked when receiving, unpacking and checking a delivery from a supplier. Describe what you would do if a supplier did not provide a delivery note with the goods. Keep any documentation you have used to put in your portfolio.

10. Describe the special delivery and receipt requirements for the following:
   a) Controlled Drugs
   b) Special Orders
   c) Named patient drugs
   d) Clinical Trials
   Discuss with your Trainer/Assessor the rules and regulations that govern the special requirements for above. Ask your Trainer/Assessor to watch and check for accuracy, you receiving and unpacking an agreed number of orders, including routine orders and the list of medicine types above.
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Activities

11. Describe to your Trainer/Assessor what would be the consequences of booking stock out incorrectly.

12. Find out what you would do if you found a stock item in the incorrect location, e.g. a fridge item on the normal shelf. Identify who you would need to inform and refer this to.

13. Find out what 'stock rotation' means. Describe why it is important. Describe what you should do when stock items are found to have a short expiry date.

14. Find out any hygiene, and health and safety issues that may arise while working in your stores.

15. Find out where your procedures for the top-up service are kept. Read the procedures and discuss this with your Trainer/Assessor before training. Briefly describe the key points covered.

16. Describe what the term 'top-up' means. Identify the benefits of providing this service to the wards/departments. Find out the names of the wards/departments in your organisation. Discuss with your Trainer/Assessor each ward/department's medical speciality.

17. Find out where the ward top-up list(s) and rota are kept. Identify who is responsible for organising the top-up rota. List the day and time of your allocated ward/department top-up. Find out what you should do if you are unable to undertake your top-up due to annual leave or sickness. Find out how you would obtain a new copy when your top-up list is full.

18. Find out who the ward pharmacy technician or pharmacist is for your top-up ward/department and introduce yourself. Discuss, and list, with the ward pharmacy technician or pharmacist any do's or don'ts that are specific to this ward, including the best time to undertake your top-up. Ask the ward pharmacy technician or pharmacist to take you to the ward and introduce you to the staff.

19. Draw a map of the layout of the ward and list where the stock is kept. Identify and describe why some medicines (if any) are stored in special locations away from others. Discuss this with your Trainer/Assessor.

20. Describe what happens to excess stock brought back to the pharmacy. Ask your Trainer/Assessor to observe you dealing with this excess stock.
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Activities

21. Familiarise yourself with the names of the medicines on the stock list. Ask your Trainer/Assessor to select 20 medicines from the list, then find them on the ward and ask your Trainer/Assessor to check that you have selected the correct items.

22. Describe what you would do if you found incorrectly stored stock on your ward/department, e.g. a fridge item left out of the fridge. Discuss this with your Trainer/Assessor.

23. When you are on the ward there will be times when you are asked a question by a doctor or nurse that you will be unable to answer. Do not guess or be afraid to admit that you do not know. Find out and record who to refer enquiries to, if an immediate response is required.

24. Role play with your Trainer/Assessor how you would handle a difficult situation which might arise on your ward, e.g. a nurse wanting stock urgently.

25. Discuss with your Trainer/Assessor what health and safety issues may arise during your visit to the ward. Identify and list the types of hazardous materials you might come into contact with. Find out where the fire exits and extinguishers are in the stock areas of the ward and ask the ward staff or your Trainer/Assessor what you must do if there is a fire when you are on the ward.
Questions

K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

• What are your roles and responsibilities relating to storing pharmaceutical stock?

• What are the roles and responsibilities of the other members of your team who are involved in storing pharmaceutical stock?
K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Under what circumstances would you refer to a pharmacy technician when storing pharmaceutical stock?

- Under what circumstances would you refer to a pharmacist when storing pharmaceutical stock?
(continued)

K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Which other healthcare professionals might you refer to when storing pharmaceutical stock?

- Under what circumstances would you refer to these other healthcare professionals when storing pharmaceutical stock?
Unit 205 Order, receive and store pharmaceutical stock

(continued)

K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- What are your roles and responsibilities relating to issuing pharmaceutical stock?

- What are the roles and responsibilities of the other members of your team who are involved in issuing pharmaceutical stock?
Unit 205 Order, receive and store pharmaceutical stock

(continued)

**K1** The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Under what circumstances would you refer to a pharmacy technician when issuing pharmaceutical stock?

- Under what circumstances would you refer to a pharmacist when issuing pharmaceutical stock?
K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Which other healthcare professionals might you refer to when issuing pharmaceutical stock?

- Under what circumstances would you refer to these other healthcare professionals when issuing pharmaceutical stock?
K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- What are your roles and responsibilities relating to receiving pharmaceutical stock?

- What are the roles and responsibilities of the other members of your team who are involved in receiving pharmaceutical stock?
**Unit 205** Order, receive and store pharmaceutical stock

*(continued)*

**K1** The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Under what circumstances would you refer to a pharmacy technician when receiving pharmaceutical stock?

- Under what circumstances would you refer to a pharmacist when receiving pharmaceutical stock?
Unit 205  Order, receive and store pharmaceutical stock

(continued)

K1  The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Which other healthcare professionals might you refer to when receiving pharmaceutical stock?

- Under what circumstances would you refer to these other healthcare professionals when receiving pharmaceutical stock?
Unit 205  Order, receive and store pharmaceutical stock

(continued)

K1  The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

• What are your roles and responsibilities relating to the ordering of pharmaceutical stock?

• What are the roles and responsibilities of the other members of your team who are involved in the ordering of pharmaceutical stock?
Unit 205 Order, receive and store pharmaceutical stock

(continued)

K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Under what circumstances would you refer to a pharmacy technician when ordering pharmaceutical stock?

- Under what circumstances would you refer to a pharmacist when ordering pharmaceutical stock?
K1 The limits of your own authority and when to refer to a pharmacist or pharmacy technician.

- Which other healthcare professionals might you refer to when ordering pharmaceutical stock?

- Under what circumstances would you refer to these other healthcare professionals when ordering pharmaceutical stock?
NVQ Level 2 Pharmacy Services award Underpinning Knowledge Manual

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Questions

K2 The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.

- What procedures are in place in your department and organisation relating to storing pharmaceutical stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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(continued)

K2  The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.

- What procedures are in place in your department and organisation relating to issuing pharmaceutical stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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(continued)

K2 The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.

- What procedures are in place in your department and organisation relating to receiving pharmaceutical stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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(continued)

K2  The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.

- What procedures are in place in your department and organisation relating to ordering pharmaceutical stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
Questions

K3 The importance of maintaining correct accurate documentation.

- What documentation must be maintained in your workplace?

- Why is it important to maintain correct accurate documentation?
  - What could happen if this documentation was not accurately maintained?

- What are your roles and responsibilities in maintaining this documentation?

- What are the roles and responsibilities of the other members of your team in maintaining this documentation?
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Questions

K4 The different formulation of drugs and why it is important to use the correct formulation and strength.

- What different drug forms are used in your organisation?
- Under what circumstances are these different drug forms used?

- Why is it important to order the correct drug form?
- What could happen if you ordered the incorrect drug form?
Unit 205  Order, receive and store pharmaceutical stock

(continued)

K4 The different formulation of drugs and why it is important to use the correct formulation and strength.

- Why is it important to receive the correct drug form?
- What could happen if you received the incorrect drug form?

- Why is it important to issue the correct drug form?
- What could happen if you issued the incorrect drug form?
Unit 205  Order, receive and store pharmaceutical stock

(continued)

K4 The different formulation of drugs and why it is important to use the correct formulation and strength.

- Why is it important to order the correct drug strength?
- What could happen if you ordered the incorrect drug strength?

- Why is it important to receive the correct drug strength?
- What could happen if you received the incorrect drug strength?

- Why is it important to issue the correct drug strength?
- What could happen if you issued the incorrect drug strength?
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Questions

K5  The difference between branded and generic drugs.

• What is meant by a generic product?

• What is meant by a branded product?

• Under what circumstances must you order a branded product?

• Why is it important to order a branded product in these circumstances?
  • What could happen if you did not order a branded product in these circumstances?
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(continued)

K5  The difference between branded and generic drugs.

- Under what circumstances must you receive a branded product?
- Why is it important to receive a branded product in these circumstances?
- What could happen if you did not receive a branded product in these circumstances?

- Under what circumstances must you issue a branded product?
- Why is it important to issue a branded product in these circumstances?
- What could happen if you did not issue a branded product in these circumstances?
Questions

K6 The relevant Health and Safety requirements in respect to the storage and issuing of stock including manual handling.

- What are the Health and Safety requirements in respect to the storage of pharmaceutical stock which are relevant to your job role?
- What are the key points covered in these requirements?

- What are your duties for health and safety in the workplace as required by these requirements?

- Why is it important that you follow these requirements?
- What could happen if you did not follow these requirements?
K6 The relevant Health and Safety requirements in respect to the storage and issuing of stock including manual handling.

- What are the Health and Safety requirements in respect to issuing pharmaceutical stock which are relevant to your job role?
- What are the key points covered in these requirements?

- What are your duties for health and safety in the workplace as required by these requirements?

- Why is it important that you follow these requirements?
- What could happen if you did not follow these requirements?
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(continued)

K6 The relevant Health and Safety requirements in respect to the storage and issuing of stock including manual handling.

- What hazardous material do you come into contact with in your job role?
- How can you identify these materials?
- What special precautions do you need to take when working with these materials?
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(continued)

K6  The relevant Health and Safety requirements in respect to the storage and issuing of stock including manual handling.

- What manual handling legislation is in place in your organisation and department?
- What are the key points covered in this legislation?

- What are your duties for health and safety in the workplace as required by this legislation?

- Why is it important that you follow this legislation?
  - What could happen if you did not follow this legislation?

- What manual handling issues do you encounter in your job role?
Questions

K7 The sources and suppliers of stock.

- What sources and suppliers can be used to order pharmaceutical stock?
- Which of these sources and suppliers do you use to order pharmaceutical stock?
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(continued)

K7 The sources and suppliers of stock.

- Under what circumstances is stock ordered from pharmaceutical companies?
- What are the reasons for this?

- Under what circumstances is pharmaceutical stock ordered from wholesalers?
- What are the reasons for this?
Questions

K8 Ordering SOPs and why they are implemented.
See K2 The procedures that apply to storing, issuing, receiving and ordering pharmaceutical stock.
K9 Why expiry dates are important.

- Why is it important to check the expiry of the drugs you receive?
- What could happen if you received an expired drug?

- Why is it important to check the expiry of the drugs you issue?
- What could happen if you issued an expired drug?

- What do the following terms mean?
  - Use before
  - Do not use after
  - Expires
  - Use by
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Questions

K10 The importance of only receiving goods identified on the delivery note and to check this against the original order.

- Why is it important that you only receive goods identified on the delivery note?
- What could happen if you received goods which were not identified on the delivery note?

- Why is it important that you check the goods received against the original order?
- What could happen if you did not do this?
Questions

K11 The procedures for dealing with damaged or incomplete or incorrect deliveries.

- What procedures are in place in your department for dealing with damaged deliveries?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
K11 The procedures for dealing with damaged or incomplete or incorrect deliveries.

- What procedures are in place in your department for dealing with incomplete deliveries?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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(continued)

K11  The procedures for dealing with damaged or incomplete or incorrect deliveries.

- What procedures are in place in your department for dealing with incorrect deliveries?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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Questions

K12 The storage requirements for different types of products and why they are important.

- Which pharmaceutical products that you come into contact with in your job role have special storage requirements?
- How can you identify these pharmaceutical products?
- How should these pharmaceutical products be stored?
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(continued)

K12 The storage requirements for different types of products and why they are important.

- Why is it important that these pharmaceutical products are stored correctly?
- What could happen if these pharmaceutical products are not stored correctly?

- What implications could there be for the patient if these pharmaceutical products are not stored correctly?
Questions

K13 The principles of stock rotation.

- What is meant by stock rotation?
- What does stock rotation entail?

- Why is it important to rotate stock?
- What could happen if this did not occur?
Questions

K14 The signs to look for and how to handle products that are damaged, contaminated or deteriorated.

- How could you tell that a product was damaged?
- What are the signs to look for?

- How should damaged products be handled?
- What are the reasons for this?
### Unit 205 Order, receive and store pharmaceutical stock

(continued)

**K14** The signs to look for and how to handle products that are damaged, contaminated or deteriorated.

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<td>How could you tell that a product was contaminated?</td>
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<td>•</td>
<td>How should contaminated products be handled?</td>
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<td>What are the reasons for this?</td>
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</table>
K14 The signs to look for and how to handle products that are damaged, contaminated or deteriorated.

- How could you tell that a product had deteriorated?
- What are the signs to look for?

- How should products that have deteriorated be handled?
- What are the reasons for this?
Questions

K15 What to do with out dated or short dated stock.

- What procedures are in place in your department and organisation for dealing with out dated stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
K15 What to do with out dated or short dated stock.

- What procedures are in place in your department and organisation for dealing with short dated stock?
- What are the key points covered in these procedures?

- Why is it important that you follow these procedures?
- What could happen if you did not follow these procedures?
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**Questions**

**K16** The importance of maintaining storage areas in good condition.

- Why is it important to maintain storage areas in a good condition?

- What could happen if storage areas were not maintained in a good condition?

- How are storage areas maintained in a good condition in your workplace?
K16 The importance of maintaining storage areas in good condition.

- What are your roles and responsibilities in maintaining storage areas in a good condition?

- What are the roles and responsibilities of the other members of your team in maintaining storage areas in a good condition?
**Unit 205 Order, receive and store pharmaceutical stock**

(continued)

**K16** The importance of maintaining storage areas in good condition.

- What should you do if a spillage occurs in your workplace?
- Where are spill kits located in your department?
- What is contained in these spill kits?
- Under what circumstances should these spill kits be used?
Questions

Understand why drug companies perform 'drug recalls' and how this is managed within stock control systems.  
(from the NVQ Level 2 Knowledge and Understanding Framework for unit 205)

- Under what circumstances do drug companies perform 'drug recalls'?

- How are drug recalls managed within stock control systems?