PHARMACY MEDICINE EXPIRY CONTROL AND STOCK-LOSS PREVENTION TEMPLATE

Medicine Expiry Checklist

Control receiving shelf life, FEFO rotation, routine checks, cold-chain stock, opened and beyond-use dates, near-expiry action, quarantine, returns, secure disposal, and corrective actions.

PHARMACY / LOCATION	CHECKLIST DATE	CHECKER	RESPONSIBLE PHARMACIST

Operational template. Adapt it to applicable pharmacy, medicine, controlled-stock, waste, manufacturer, and local regulatory requirements.

1. Checklist setup, scope, ownership, and expiry rules

1 Confirm the pharmacy or medicine-storage location, checklist date, operating period, responsible pharmacist, checker, reviewer, and escalation contacts. — METADATA + SIGN-OFF

NAME | Enter — TIME | __:__ — SIGNATURE | Sign

Execution tip: Assign clear ownership for checking, quarantine, returns, disposal, system updates, and final approval before the review begins.

2 Define the prescription, over-the-counter, refrigerator, controlled, high-alert, hazardous, returns, quarantine, and waste areas included in the check. — AREA SCOPE CHECKLIST

☐ Included ☐ Verified ☐ Restricted ☐ Evidence

Execution tip: Map every location where medicines are received, stored, prepared, displayed, returned, isolated, or awaiting disposal.

3 Verify the current expiry-control procedure defines date interpretation, first-expiry-first-out rotation, near-expiry thresholds, quarantine, returns, and disposal. — CRITICAL — PROCEDURE VERIFICATION

Current | Incomplete | Missing / expired | Attach record

Execution tip: Use the approved local procedure and product instructions rather than assuming one rule applies to every medicine category.

4 Confirm the approved near-expiry alert windows for each medicine category, supplier arrangement, service model, and location risk profile. — THRESHOLD VERIFICATION

Current | Incomplete | Missing / expired | Attach record

Execution tip: Set alert windows early enough to allow transfer, return, controlled use, or other approved action before expiry.

5 Review previous expired-stock findings, near-expiry losses, missed returns, temperature excursions, recalls, stock variances, and overdue actions. — PREVIOUS FINDINGS REVIEW

Current | Incomplete | Missing / expired | Attach record

Execution tip: Use repeat findings to focus the check on weak categories, locations, shifts, suppliers, or processes.

6 Capture the checklist start time, geo-location, operating status, and approved reference evidence without exposing patient or prescription information. — CRITICAL — GEO-LOCATION + TIMESTAMP + PHOTO

Controlled | Gap found | Expired stock | Add approved photo

Execution tip: Photograph stock status and storage controls only, and avoid labels or records that contain patient-identifying information.

2. Receiving, shelf-life acceptance, and batch capture

7 Verify each sampled delivery was checked for product, strength, dosage form, quantity, batch or lot, expiry date, packaging condition, and supplier documents.

CRITICAL | RECEIVING TRACEABILITY CHECK

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: Trace the physical item to the delivery record and confirm the recorded batch and expiry match the pack.

8 Confirm remaining shelf life at receipt meets the approved acceptance threshold for the medicine category and intended rate of use.

CRITICAL | SHELF-LIFE ACCEPTANCE CHECK

Low risk | Medium risk | High / critical | Quarantine / action

Execution tip: Reject or escalate stock that cannot reasonably be used, transferred, or returned before expiry under normal demand.

9 Check short-dated stock is identified at receipt, recorded, approved, and routed to the correct location or action workflow.

SHORT-DATED STOCK CONTROL

Finding	Owner	Priority	Due	Evidence

Execution tip: Do not place short-dated stock into general inventory without a documented plan and accountable owner.

10 Verify damaged, illegible, tampered, leaking, heat-exposed, or otherwise questionable packs are separated and assessed before acceptance.

CRITICAL | PACK CONDITION INSPECTION

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Treat unreadable or compromised expiry information as an immediate supply risk until authorized assessment is complete.

11 Confirm electronic or manual inventory records capture the correct product, batch or lot, expiry date, quantity, storage condition, and receipt date.

CRITICAL | INVENTORY RECORD VERIFICATION

PHYSICAL | Count
SYSTEM | Count
VARIANCE | Enter
Attach report

Execution tip: Use barcode or system validation where available and correct mismatched expiry data before stock is released.

12 Review supplier agreements and records for short-dated returns, credits, recalls, rejected stock, transport deviations, and documentation requirements.

SUPPLIER ARRANGEMENT REVIEW

Current | Incomplete | Missing / expired | Attach record

Execution tip: Know the return window and evidence required so near-expiry stock is actioned before supplier deadlines are missed.

3. Storage, first-expiry-first-out rotation, and stock organization

13 Verify medicines are arranged so the earliest approved expiry is selected first within each product, strength, dosage form, and batch group.

CRITICAL | FEFO SHELF INSPECTION

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Check behind and below front packs because later-expiry stock is often placed in front during replenishment.

14 Confirm shelf labels, bins, drawers, cabinets, automated systems, and picking locations make batch and expiry status visible to staff.

LOCATION AND LABEL CONTROL

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Use clear location ownership and avoid mixed or unlabeled stock that makes first-expiry selection unreliable.

15 Check new deliveries are rotated behind earlier-expiry stock and replenishment activity does not hide short-dated packs.

REPLENISHMENT OBSERVATION

Controlled | Partial gap | Non-compliant | N/A

Execution tip: Observe an actual replenishment task or sample recently replenished lines instead of relying only on staff confirmation.

16 Verify returned, damaged, recalled, expired, quarantined, and patient-returned medicines are physically separated from saleable inventory.

CRITICAL | SEGREGATION INSPECTION

☐ Included | ☐ Verified | ☐ Restricted | ☐ Evidence

Execution tip: Use distinct, secured, and clearly labeled areas so unsuitable stock cannot be selected accidentally.

17 Confirm storage conditions follow approved product-label requirements and that heat, moisture, light, contamination, or pest exposure has not shortened usable life.

CRITICAL | STORAGE CONDITION REVIEW

READING | Enter — LIMIT | Approved range — DEVICE | ID — Attach log

Execution tip: Investigate any condition outside approved limits even when the printed expiry date has not been reached.

18 Check shelves, drawers, refrigerators, bins, and automated dispensing locations are clean, organized, not overloaded, and accessible for complete expiry inspection.

STORAGE ACCESSIBILITY CHECK

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Poor access and overcrowding are common reasons hidden expired packs remain undetected.

4. Routine shelf checks, sampling, and near-expiry identification

19 Verify daily, weekly, or monthly expiry checks are completed at the frequency defined for each area and medicine risk category.
SCHEDULE AND COMPLETION REVIEW

Current | Incomplete | Missing / expired | Attach record

Execution tip: Higher-volume, refrigerated, controlled, and high-risk areas may require more frequent checks than general shelves.

20 Confirm the checker scans the complete location, including back stock, overflow, drawers, refrigerators, emergency kits, and low-use items.
CRITICAL | COMPLETE-AREA INSPECTION

☐ Included | ☐ Verified | ☐ Restricted | ☐ Evidence

Execution tip: Use a location map or sequence so no cabinet, basket, shelf, or emergency reserve is skipped.

21 Review a representative sample of products and compare physical expiry dates with the inventory system or expiry report.
CRITICAL | PHYSICAL-TO-SYSTEM SAMPLE

PHYSICAL | Count | SYSTEM | Count | VARIANCE | Enter | Attach report

Execution tip: Include fast-moving, slow-moving, high-cost, high-risk, refrigerated, and recently received medicines.

22 Verify near-expiry products are marked, listed, or system-flagged using the approved threshold without obscuring mandatory product information.
NEAR-EXPIRY IDENTIFICATION

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Use a method that is visible to staff but does not damage packaging or cover the batch, expiry, or instructions.

23 Check dates are interpreted correctly where labels show month and year, full dates, multiple dates, manufacturer dates, or local formats.
CRITICAL | DATE INTERPRETATION CHECK

Low risk | Medium risk | High / critical | Quarantine / action

Execution tip: Escalate unclear or conflicting date information rather than estimating the usable period.

24 Confirm completed checks record area, product, batch or lot, expiry, quantity, status, action, checker, date, time, and reviewer.
EXPIRY LOG COMPLETENESS

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: A tick alone is not enough when near-expiry or expired stock requires traceable action.

5. Refrigerated, frozen, temperature-sensitive, and cold-chain medicines

25 Inspect refrigerated and other temperature-sensitive medicines for printed expiry, batch, quantity, and first-expiry-first-out arrangement.

CRITICAL | COLD-CHAIN EXPIRY INSPECTION

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Check every basket, door area, secondary container, backup refrigerator, and temporary storage location.

26 Verify temperature records, alarms, calibration status, excursions, and product assessments support continued use through the recorded expiry period.

CRITICAL | TEMPERATURE HISTORY REVIEW

READING | Enter — LIMIT | Approved range — DEVICE | ID — Attach log

Execution tip: A valid printed expiry date does not override an unresolved storage excursion or product-quality concern.

27 Confirm short-dated cold-chain medicines have a documented use, transfer, return, or quarantine plan that preserves required conditions.

CRITICAL | SHORT-DATED COLD-CHAIN ACTION

Finding	Owner	Priority	Due	Evidence

Execution tip: Include transport time, receiving confirmation, monitoring, and authorized acceptance at the destination.

28 Check opened multi-dose containers, insulin, vaccines, eye drops, liquids, or similar products carry approved opening or discard dates where required.

CRITICAL | OPEN-DATE LABEL CHECK

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: Apply the correct post-opening or in-use period from approved instructions, not only the manufacturer expiry on the unopened pack.

29 Verify backup, emergency, outreach, transport, or insulated-container stock is included in expiry checks and remains traceable to location and owner.

MOBILE AND BACKUP STOCK REVIEW

☐ Included ☐ Verified ☐ Restricted ☐ Evidence

Execution tip: Temporary and seldom-used stock is easy to miss and should appear on the same expiry-control schedule.

30 Confirm expired or excursion-affected cold-chain stock is immediately isolated, temperature-controlled where required, and assessed before return or disposal.

CRITICAL | COLD-CHAIN QUARANTINE CONTROL

Finding	Owner	Priority	Due	Evidence

Execution tip: Preserve evidence and storage conditions until an authorized disposition decision is documented.

6. Opened, reconstituted, compounded, repackaged, and prepared medicines

31 **Verify every opened or first-used medicine that requires an in-use period carries the opening date, calculated discard date, initials, and storage instructions.**

CRITICAL | OPEN-DATE AND DISCARD-DATE CHECK

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: Do not rely on memory or the outer carton when the in-use period begins after opening.

32 **Check reconstituted medicines carry the preparation date and time, approved beyond-use or discard date, storage condition, and preparer identification.**

CRITICAL | RECONSTITUTION LABEL CHECK

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: Calculate the date from approved product instructions and remove any item with missing or uncertain preparation information.

33 **Verify compounded or prepared medicines use an approved beyond-use date that is distinct from the manufacturer expiry of ingredients.**

CRITICAL | BEYOND-USE DATE VERIFICATION

Current | Incomplete | Missing / expired | Attach record

Execution tip: Check the formulation record, preparation conditions, packaging, storage, and authorized dating rule.

34 **Confirm repackaged, unit-dose, compliance-pack, or relabeled medicines retain traceable product, strength, batch or lot, expiry or beyond-use date, and quantity.**

CRITICAL | REPACKAGING TRACEABILITY CHECK

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: The new label must preserve enough information to trace and control the medicine throughout its assigned usable period.

35 **Inspect partial packs, loose units, samples, emergency trays, ward or clinic supplies, and returned stock for clear identity and usable-date status.**

CRITICAL | PARTIAL AND DISTRIBUTED STOCK CHECK

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Quarantine any unit whose identity, batch, storage history, or expiry status cannot be confirmed.

36 **Verify opened, prepared, or repackaged medicines are removed promptly when their in-use or beyond-use date is reached, even if the original pack expiry is later.**

CRITICAL | IN-USE EXPIRY REMOVAL

Finding	Owner	Priority	Due	Evidence

Execution tip: Configure reminders or daily checks for products whose usable period changes after opening or preparation.

7. Controlled, high-alert, hazardous, recalled, and quarantined medicines

37 Verify controlled medicines are checked for expiry within secured storage and reconciled to the authorized register or inventory balance.

CRITICAL | CONTROLLED-STOCK EXPIRY COUNT

PHYSICAL | Count · SYSTEM | Count · VARIANCE | Enter · Attach report

Execution tip: Complete the count with authorized staff and document any variance, seal issue, or unexplained pack status immediately.

38 Confirm expired controlled medicines remain secured, clearly identified, separately recorded, and inaccessible for dispensing pending authorized disposal.

CRITICAL | CONTROLLED-STOCK QUARANTINE

Low risk · Medium risk · High / critical · Quarantine / action

Execution tip: Maintain custody, access records, and disposal documentation according to applicable requirements.

39 Check high-alert, hazardous, cytotoxic, narcotic, biological, or other special-risk medicines use appropriate expiry controls, segregation, PPE, and handling.

CRITICAL | SPECIAL-RISK MEDICINE CONTROL

☐ Included · ☐ Verified · ☐ Restricted · ☐ Evidence

Execution tip: Do not combine special-risk waste or returns with general medicine stock unless the approved process specifically allows it.

40 Verify recall and safety-alert checks identify affected product, batch or lot, expiry, quantity, location, patient or supply trace where applicable, and disposition.

CRITICAL | RECALL TRACEABILITY TEST

Trace complete · Partial trace · Trace failed · Attach record

Execution tip: Test one recent alert or a simulated recall to confirm the location can find and isolate affected stock quickly.

41 Confirm recalled, suspect, counterfeit, tampered, damaged, temperature-affected, and expired medicines use distinct quarantine status and documentation.

CRITICAL | QUARANTINE STATUS REVIEW

Good condition · Near expiry / monitor · Expired / action · Add evidence

Execution tip: Different statuses may require different investigation, reporting, return, or disposal routes.

42 Review access logs, stock adjustments, witnesses, destruction records, and approvals for expired special-risk medicines awaiting or completing disposition.

CRITICAL | RESTRICTED DISPOSITION RECORD

Current · Incomplete · Missing / expired · Attach record

Execution tip: Ensure quantity and custody remain traceable from removal through final authorized disposition.

8. Near-expiry action, transfer, return, supplier credit, and waste prevention

43 Review the current near-expiry report and confirm every listed product has an owner, quantity, batch, expiry, location, action, and deadline.

NEAR-EXPIRY ACTION REGISTER

Finding	Owner	Priority	Due	Evidence

Execution tip: Prioritize by time remaining, patient demand, value, storage risk, and supplier return deadline.

44 Verify transfer between locations is approved, demand-based, traceable, and completed early enough for safe use before expiry.

CRITICAL | TRANSFER VERIFICATION

Trace complete | Partial trace | Trace failed | Attach record

Execution tip: Confirm the destination accepts the batch, quantity, expiry, storage condition, and accountability before dispatch.

45 Check supplier return, credit, replacement, or reverse-logistics requests are raised within the eligible window and supported by required evidence.

SUPPLIER RETURN REVIEW

Current | Incomplete | Missing / expired | Attach record

Execution tip: Track the request through pickup, acknowledgement, credit, rejection, or other final outcome.

46 Confirm near-expiry medicines are not promoted, supplied, or transferred in a way that conflicts with professional judgment, policy, patient need, or local requirements.

CRITICAL | SUPPLY DECISION REVIEW

Low risk | Medium risk | High / critical | Quarantine / action

Execution tip: Expiry reduction must never override patient safety, adequate treatment duration, storage, counseling, or lawful supply.

47 Review high-value or recurring near-expiry items for ordering, forecasting, pack size, minimum stock, supplier lead time, and demand-planning changes.

WASTE PREVENTION ANALYSIS

PHYSICAL | Count — SYSTEM | Count — VARIANCE | Enter — Attach report

Execution tip: Separate one-time anomalies from purchasing or stocking patterns that repeatedly create avoidable expiry loss.

48 Verify approved donation, redistribution, or alternative-use routes meet eligibility, traceability, remaining shelf-life, storage, authorization, and documentation rules.

CRITICAL | REDISTRIBUTION ELIGIBILITY CHECK

Current | Incomplete | Missing / expired | Attach record

Execution tip: Do not move stock through informal channels or where the receiving party cannot verify quality and lawful use.

9. Expired stock quarantine, records, return, and secure disposal

49 Verify every expired medicine found is removed from saleable or dispensable stock immediately and placed in the approved quarantine location.

CRITICAL | IMMEDIATE EXPIRY CONTAINMENT

Finding	Owner	Priority	Due	Evidence

Execution tip: Record the exact product, batch, expiry, quantity, source location, finder, date, and time at removal.

50 Confirm expiry quarantine areas are secured, labeled, organized, access-controlled, protected from leakage or diversion, and separated by risk category where required.

CRITICAL | QUARANTINE AREA INSPECTION

Good condition | Near expiry / monitor | Expired / action | Add evidence

Execution tip: Expired stock must remain identifiable and inaccessible for accidental selection or unauthorized removal.

51 Check expired-stock records reconcile physical quantity to inventory adjustments, controlled registers, return notes, waste records, and financial write-offs.

CRITICAL | EXPIRED-STOCK RECONCILIATION

PHYSICAL | Count
SYSTEM | Count
VARIANCE | Enter
Attach report

Execution tip: Investigate every mismatch before the batch is returned, transferred to waste custody, or destroyed.

52 Verify patient-returned medicines are not returned to saleable stock and follow the approved take-back, custody, privacy, and disposal process.

CRITICAL | PATIENT-RETURN CONTROL

Low risk | Medium risk | High / critical | Quarantine / action

Execution tip: Protect personal information and prevent returned medicines from re-entering the supply chain.

53 Review return, collection, transport, handover, destruction, or disposal records for authorized party, date, quantity, medicine category, witnesses, and certificates.

CRITICAL | DISPOSITION DOCUMENTATION REVIEW

Current | Incomplete | Missing / expired | Attach record

Execution tip: Retain traceable proof from pharmacy quarantine through final authorized disposition.

54 Confirm disposal follows applicable local requirements, product instructions, hazardous-waste controls, environmental safeguards, and approved take-back routes.

CRITICAL | DISPOSAL COMPLIANCE VERIFICATION

Current | Incomplete | Missing / expired | Attach record

Execution tip: Do not use a generic disposal method for controlled, hazardous, cytotoxic, pressurized, refrigerated, or other special-category medicines.

10. Reporting, root cause, corrective action, verification, and sign-off

55 Summarize expired and near-expiry items by product, batch, quantity, value, location, medicine category, cause, and disposition status.

EXPIRY SUMMARY REPORT

PHYSICAL | Count — SYSTEM | Count — VARIANCE | Enter — Attach report

Execution tip: Use consistent categories so trends can be compared across periods and locations.

56 Escalate any expired medicine found in saleable stock, supplied to a patient, unaccounted controlled item, failed quarantine, or missing disposal evidence.

CRITICAL — CRITICAL INCIDENT ESCALATION

Finding	Owner	Priority	Due	Evidence

Execution tip: Follow the approved patient-safety, recall, incident, regulatory, and communication process without delay.

57 Assign every finding an owner, priority, due date, escalation route, required evidence, reviewer, and closure criteria.

CORRECTIVE-ACTION ASSIGNMENT

Finding	Owner	Priority	Due	Evidence

Execution tip: Make each action specific enough that a different reviewer can verify completion objectively.

58 Complete root-cause review for repeat or material expiry loss and define prevention across ordering, receiving, storage, rotation, systems, training, and supervision.

ROOT-CAUSE AND PREVENTION PLAN

Finding	Owner	Priority	Due	Evidence

Execution tip: Separate immediate stock removal from the process change needed to prevent recurrence.

59 Verify action closure through reinspection, system correction, stock reconciliation, return or disposal evidence, staff observation, and authorized approval.

CRITICAL — CLOSURE VERIFICATION

Finding	Owner	Priority	Due	Evidence

Execution tip: Reject closure based only on a comment when physical, system, custody, or disposal evidence is required.

60 Record the overall checklist status, unresolved restrictions, next review date, checker, reviewer, responsible pharmacist approval, date, time, and signature.

CRITICAL — APPROVAL + SIGNATURE

NAME | Enter — TIME | __:__ — SIGNATURE | Sign

Execution tip: Do not approve while expired stock remains uncontrolled or a critical medicine-safety risk has no containment and accountable owner.