MISSING ITEMS & PURCHASING

Keep the shortage visible. Carry the action forward.

Connect missing-instrument exceptions with sourcing, order status and replacement-cost review.



Illustrative imagery

The operational challenge

A missing item can create work across packing, the OR and purchasing. If the shortage is only a handwritten note, the team may repeat the search or reorder without a clear view of the outstanding request.

The SurgiDat approach

SurgiDat records missing instruments during packing and supports exceptions reporting and RFP creation. Purchasing connects the issue with vendor information, document and line status, PO or invoice attachments and instrument pricing history.

The value to evaluate

An identifiable shortage and purchasing record can reduce duplicate follow-up, improve sourcing visibility and support analysis of avoidable replacement costs. Immediate OR return counts add earlier context to loss investigations.

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A practical workflow

01 **Record the exception**
Identify the missing instrument in the packing or count-reconciliation workflow and preserve its operational context.

02 **Review the shortage**
Use the Exceptions report to review short or missing instruments before initiating the appropriate sourcing action.

03 **Follow the purchase**
Manage RFP and order status, review line status and attach the relevant PO or invoice documents.

04 **Review the cost**
Use instrument pricing history and purchase documents to evaluate replacement spend and repeat shortages.

An illustrative scenario

An instrument is missing from a packing. The team reviews the exception and investigates whether it can be recovered before sourcing a replacement. If purchasing is needed, the RFP and order record provide a visible path for follow-up.

Measures for a facility pilot

- Outstanding missing items by age and status
- Replacement spend related to confirmed losses
- Duplicate requests and emergency sourcing frequency

A focused starting point

Select a tray group with recurring shortages. Agree who reviews exceptions, investigates recoverability and creates sourcing requests. Follow a sample issue from first count discrepancy to recovery or documented purchasing outcome.

Scope and interpretation

Purchasing status reflects recorded updates and attached documents. A missing-item record is not proof of where an instrument was lost, nor is a purchase order proof that the replacement has been received.

Start with your workflow

Bring your operational question to a SurgiDat walkthrough. No annual subscription commitment: start and leave when you want.

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