STACK RESEARCH

RESEARCH DOCUMENTATION WORKSHEET

COA and Lot Verification Checklist

A field-by-field review for keeping a laboratory report tied to the exact sample, configuration, method, and lot it describes.

Record details

Date reviewed: _____

Reviewer: _____

Public product/sample name: _____

Exact configuration: _____

SKU, if shown: _____

Lot, batch, or sample ID: _____

Public record URL: _____

Source PDF URL or filename: _____

1. Match the document

- ☐ Product or sample description matches the public record.
- ☐ Exact configuration or strength matches.
- ☐ Lot, batch, or sample identifier is present.
- ☐ Lot identifier matches the inventory or product record.
- ☐ Report applies to this lot, not a different lot with the same product name.

Unresolved mismatch: _____

2. Identify the source

Laboratory: _____

Laboratory report ID: _____

Laboratory sample ID: _____

Verification code or URL: _____

- ☐ Laboratory name and contact information are shown.
- ☐ Report ID is present on the complete document.
- ☐ Authorized signature or approval field is present.
- ☐ Online verification, when available, matches the report.

3. Follow the dates

Received: _____

Analyzed: _____

Issued: _____

- [ ] Dates appear in a consistent sequence.
- [ ] A corrected or reissued document identifies the current version.

Results and scope

4. Separate the reported fields

Identity

Method: _____

Reported result: _____

- [ ] Identity is not being used as a substitute for purity, quantity, sterility, or another unreported result.

Purity

Method: _____

Reported result and unit: _____

Calculation or reporting basis, if stated: _____

- [ ] Purity is not being presented as total fill amount or measured content.

Measured content, assay, or quantity

Method: _____

Reported result and unit: _____

Reported uncertainty, if stated: _____

- [ ] Units are preserved when the result is quoted.

Additional panels

Panel or analytes: _____

Method: _____

Reported result and limits: _____

- [ ] Only panels expressly included in the source report are represented.
- [ ] "Not detected" remains tied to the stated method and reporting limit.

5. Check method and limitations

- [ ] Technique, instrument, or method identifier is stated.
- [ ] Sample-preparation notes were reviewed.

- [ ] Reporting limits or limits of quantitation were reviewed when provided.
- [ ] Footnotes, qualifiers, and uncertainty remain attached to the result.
- [ ] Missing fields are recorded as unknown rather than inferred.

Key limitation or qualifier: _____

6. Review internal consistency

- [ ] Sample name is consistent across pages.
- [ ] Lot or batch is consistent across pages.
- [ ] Report ID matches the verification record.
- [ ] Units are consistent between data and summary.
- [ ] All pages and footnotes are present.
- [ ] The document is the full report, not a cropped result image.

7. Final disposition

- [ ] Record match confirmed.
- [ ] Clarification required.
- [ ] Rejected because the report cannot be tied to the sample or lot.

Reason or follow-up: _____

Source archived at: _____

Review completed: _____

Scope reminder

A COA supports only the sample, lot, method, dates, and results it reports. It does not establish an unreported purity, quantity, sterility, contaminant panel, regulatory status, suitability, or result for another lot.

This worksheet is for reviewing documentation associated with laboratory research materials. It does not provide dosing, administration, diagnosis, treatment, efficacy, or human- or animal-use guidance. Stack Research materials are for qualified in-vitro and laboratory research only, not for human or veterinary use.

COA center: https://stack-research.com/coa/

Testing and documentation: https://stack-research.com/testing/