



**INVENTORY AND SUPPLIES  
PROCESS**

EFFECTIVE DATE 10/1/2013

**SOP 8.5**

SIGNATURE: \_\_\_\_\_

A handwritten signature in black ink, appearing to be "R. P.", is written over a horizontal line.

PROPOSED BY: Office Coordinator

**PURPOSE**

The INVENTORY AND SUPPLIES PROCESS, as part of the INTERNAL COMMUNICATIONS PROCESSES, is to ensure that there is a process for handling the ordering and receipt of supplies and equipment in a targeted, designated and streamlined fashion.

**SCOPE**

The INVENTORY AND SUPPLIES PROCESS applies primarily to the Fiscal Operations Department and is relevant to all staff when ordering supplies and equipment.

**PROCEDURE**

The Fiscal Operations Department is responsible for ordering of all supplies and inventory control for CSS, with approval from the President. The procedure includes the following steps:

Current Employees:

1. As the need for supplies occurs, including routinely used office supplies, emails are sent by individual staff members to the Fiscal Operations Department designee with requests for supplies such as new printer ink cartridges, pens, folders, etc.
2. If the employee is on-site at the Home Office, the Fiscal Operations Department designee will check on-site supplies prior to ordering. If supply is not on hand, or if the request is made from a remote/external employee, Fiscal Operations Department designee will compile a list of supplies needed. The Fiscal Operations Department designee obtains monthly approval from the President and orders supplies.
3. If there is a request for specialized items or supplies, for example a scanner, the Fiscal Operations Department designee will request approval from the President.



4. Fiscal Operations Department designee will communicate with Employee regarding approval or denial.
5. If approval is obtained from the President, Fiscal Operations Department designee will proceed with the order.
6. If the request is denied, Fiscal Operations Department designee, President or employee may offer a suitable alternative.
7. Office supplies are purchased through a Staples contract. The Fiscal Operations Department designee will review the Staples options and try to obtain the best item for pricing. Office supplies are delivered to the Home Office.
8. If an item is not received, employee shall provide written communication to the Fiscal Operations Department designee to ensure follow up on the item.
9. When items are ordered for the office and employees, the Fiscal Operations Department designee will maintain user manuals, warranty information, etc., as needed.
10. When an employee resigns, the Fiscal Operations Department designee will obtain all equipment and unused supplies and will clean the computer for reissue if possible.
11. Fiscal Operations Department designee maintains a catalogue of returned and available equipment for the CSS Office.

***New employees:***

1. The Fiscal Operations Department designee provides the President with a comprehensive listing of equipment and supplies for the new employee. The President approves the list or amends as needed.
2. The Fiscal Operations Department designee places the order for new employee supplies and equipment and tracks the inventory as assigned to the new employee.
3. The Fiscal Operations Department designee provides new employees with an acknowledgement receipt of equipment form for signature. The form shall be maintained by both the Fiscal Operations Department designee and the Legal Department.

**DOCUMENTATION / VERIFICATION**

All ordering of supplies is tracked through the Fiscal Operations Department designee with the vendor order/receipt documentation. All inventory control is documented through the Fiscal Operations Department designee and maintained at the following location:

*Location of documentation:*

- Staff equipment inventory binder in the Fiscal Operations Department designee's office

*Supporting documentation included with this process:*



1. Sample CSS supplies inventory
2. Sample email requesting supplies

### **DOCUMENT HISTORY**

Orig. Date Feb. 2013

Rev. Sept. 2013

Rev. February 2016

Rev. March 2017

### **REVIEW AND APPROVAL**

Reviewer of the INVENTORY AND SUPPLIES PROCESS is as follows:

Reviewed By: Management Team

Date: 3/2/17

Approved By: President: David L. Cash, Jr.

Date: 3/2/17

The effective date is as of the date signed above. Processes are consistently reviewed and revised as necessary throughout the term. The INVENTORY AND SUPPLIES PROCESS may be implemented as currently written and will be formally evaluated and revised as necessary going forward.