

Version: 2 FOI Status: Public	Derbyshire County Council – Adult Social Care & Health Maintaining Inventories Guidance for Adult Social Care Offices and Establishments	Originally Issued: July 2019 V2 Issued: October 2024 Review due: October 2026 Author: Quality and Compliance
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Derbyshire County Council - Adult Social Care & Health

Maintaining Inventories Guidance for Adult Social Care Offices and Establishments

Version 2

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Derbyshire County Council Adult Social Care publishes a range of practice guidance documents to support workers managing individual cases. They are written in plain language and give clear and precise guidance detailing how professionals and other relevant parties should respond when dealing with the assessment of people with a learning disability under the Mental Health Act.

If you would like to make any comments, amendments, additions etc please email ASCH.adultcare.policy@derbyshire.gov.uk

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1. General Guidelines

1. A requirement of the county council's financial regulations is that an inventory of property must be maintained at each Adult Social Care department office or establishment using form **CT/INV/2** ([appendix 2](#)). Only one copy of each inventory is to be maintained which should be held in a securely at the location concerned and be available for audit inspection when required.
2. It is important all inventories are kept up-to-date and amendments are made promptly by the responsible officer at each location. Any obsolete items should be formally approved for write off and disposal in consultation with the service manager. An [IT disposal form](#) must be completed using the service desk online portal for all IT equipment such as PCs, laptops, fax machines and USB devices.
3. When there is a change of unit manager at an establishment it is necessary for the inventory to be agreed by both the outgoing and incoming officers with the record signed to evidence this. Where this has not been possible the service manager must act in the capacity of the outgoing officer.
4. Each inventory must be checked on an annual basis by an independent officer who must certify that the required check has been carried out. Any discrepancies in the inventory or items of unserviceable equipment should be reported to the appropriate service manager, or other senior manager designated to undertake this duty, who may authorise the inventory to be adjusted provided that any discrepancies are due to fair wear and tear. Discrepancies will be subject to normal audit scrutiny.
5. Only in exceptional circumstances should the inventory at an establishment be replaced by an entirely rewritten version. For example, this action might be appropriate in the aftermath of a major alteration or refurbishment carried out at an establishment that involves the disposal, or relocation within the building, of a significant number of inventory items. If a new inventory is produced the items on the previous inventory must be reconciled, notes should be made in the old inventory against those items that do not appear in the revised version to indicate the reasons why this is so, for example an item may have been disposed of due to fair wear and tear. These notes should be certified by the service manager. The old inventory must be retained at the establishment and be available for audit inspection for at least three years following the production of the new inventory record.

2. Format of the Inventory

1. One copy of form CT/INV/2 should be completed for each room, group of rooms or defined area at a location which will then form one page of the overall inventory. Each page should be given a unique number.
2. Each entry on form CT/INV/2 must be consecutively numbered in the column headed 'Line'.
3. For each entry the following information should be given:
 - details of the item, to include make and model (if applicable)
 - quantity
 - date of receipt of the item at the location
 - serial number

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- items written off with authority and date and method of disposal (if applicable)

4. Following the annual verification of the inventory at a location, the independent officer concerned must make an entry on form CT/INV/1 ([appendix 1](#)) in the following manner:

- the date on which the inventory was verified
- the signature of the verifying officer
- their designation
- the page and line number of the items verified

3. Which items should be included in the Inventory

1. 'An article ranks for inclusion in the inventory if it:

- is attractive/desirable in the sense that there is an obvious potential for it to be purloined
- is portable
- has a value in excess of £250

The following items should not be recorded in inventories maintained within the Adult Social Care department:

- desks
- chairs
- filing cabinets
- furniture
- bed linen (including hired linen)
- crockery and cutlery
- the personal property of residents and clients

All other items at a location, provided they meet the criteria set out above, must be included in the inventory.

2. Items that have been donated by voluntary organisations or purchased from amenity fund monies, and which meet the criteria set out in (1) above, must be included in the inventory with a note indicating the source of the item.

3. Rented equipment should be included in the inventory.

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Author History

Approval and Authorisation History

Name	Date
Authored by Toni Padley Project Officer	July 2019
Approved and Authorised by Quality Compliance Group	July 2019

Change History

Version	Date	Name	Reason
Version 1	July 2019	Quality and Compliance team	New guidelines required
Version 1a	November 2021	Quality and Compliance team	Review – no changes
Version 2	October 2024	Quality and Compliance team	Review – no changes