Field Tool Theft Prevention and Inventory Control Standard Operating Procedure

1.0 Objective & Scope

The objective of this procedure is to prevent the theft and loss of field tools by implementing a rigorous check-in/check-out system, maintaining real-time inventory visibility, and enforcing accountability among all personnel who handle company tools. This SOP applies to all warehouse staff, field technicians, and supervisors who issue, receive, or transport tools to and from job sites.

Scope includes all portable power tools, hand tools, specialty equipment, and accessories valued over $50 CAD. The goal is to achieve 100% accountability for every tool at all times and reduce annual tool loss to less than 1% of total tool inventory value.

2.0 Required Systems, Tools & Materials

- SupplyGrid WMS or equivalent inventory management system with tool tracking module
- Barcode scanner (Zebra TC21 or equivalent) or mobile device with scanning app
- Tool tags (durable barcode or RFID labels) for each individual tool
- Lockable tool crib or cage with controlled access
- Tool check-out/check-in log (digital or paper backup)
- Employee ID badges with barcodes for identification
- Tamper-evident seals for toolboxes and gang boxes
- Digital camera or smartphone for documenting tool condition
- Clipboard, pen, and incident report forms for manual backup

3.0 Safety & Handling Precautions

- High-visibility vest and steel-toed boots required in all tool crib and warehouse areas.
- Use proper lifting techniques when handling heavy tools or toolboxes over 20 kg.
- Ensure all power tools are disconnected from power sources before tagging or scanning.
- Report any damaged or malfunctioning tools immediately to the supervisor.
- Never leave tools unattended in unsecured areas; always lock tool cribs and gang boxes.
- Do not share personal login credentials for the inventory system.

4.0 Step-by-Step Procedure

1. Log into the SupplyGrid WMS and navigate to the 'Tool Inventory' module.
2. Scan the barcode on the employee's ID badge to initiate a check-out or check-in transaction.

3. For check-out: scan the barcode on each tool being issued. Verify the tool name, serial number, and condition against the system record.

4. If the tool is new or has no existing barcode, create a new asset record in the system: enter tool type, brand, model, serial number, purchase date, and assign a unique barcode label.

5. Affix the barcode label to a clean, dry surface on the tool (avoid moving parts or heat sources). For small tools, attach the label to the storage case.

6. Take a clear digital photo of the tool showing its condition and upload it to the asset record.

7. For check-in: scan the tool barcode, then scan the employee badge. Inspect the tool for damage, missing parts, or excessive wear. Update the condition status in the system.

8. If a tool is returned damaged, create a 'Damaged' status in the system, attach a red quarantine tag, and place the tool in the designated repair/ quarantine area.

9. At the end of each shift, run a 'Pending Returns' report in the WMS to identify any tools not checked in. Contact the assigned employee immediately.

10. Conduct a weekly physical audit of 10% of the tool inventory, comparing physical counts to system records. Focus on high-value and frequently used tools.

11. If a tool is reported lost or stolen, immediately update its status to 'Missing' in the system, notify the warehouse supervisor, and file an incident report within 24 hours.

12. For tools stored in gang boxes on job sites, assign a unique lock and key to each box. Record the key assignment in the system and require daily sign-off by the responsible technician.

5.0 Verification & Discrepancy Reporting

1. After each check-in or check-out transaction, verify that the system count for that tool matches the expected quantity (1 for serialized tools). If a discrepancy is found, re-scan the tool and employee badge.

2. During weekly audits, if the physical count differs from the system count by more than one tool, escalate to the Inventory Manager immediately.

3. For any tool found missing without a check-out record, treat it as a potential theft. Secure the area, review access logs, and interview the last known user.

4. Document all discrepancies on the 'Tool Discrepancy Report' form, including tool ID, expected location, actual location, last known user, and any relevant notes.

5. Submit the completed discrepancy report to the Warehouse Manager within 2 hours of discovery. The manager will initiate an investigation and determine if a police report is required.

6. If a tool is recovered after being reported missing, update its status to 'Available' only after a full inspection and approval from the supervisor.