



DEPARTMENTAL INVENTORY CONTROL PROCEDURE

Purpose: To assist the campus community to ensure compliance with University policy (Trustee Doc T96-073) regarding the safe management of fixed assets under the control of the university.

Scope: These guideline pertain to all property, real and personal, under the control of the University of Massachusetts Dartmouth.

Responsibility: It is the responsibility of the Departments to notify Property Control of all location changes, reporting of lost or stolen property, disposal of equipment and equipment located off campus. The following are the guidelines for each.

Department Inventory POC: Each UMass Dartmouth department has to assigned an inventory POC, who is the liaison between the department and the property office for inventory matters. Inventory coordinators assist in the maintenance of inventory controls over equipment in their areas with the direct support of the property office.

Property Control :

Gary Gula
Power Plant/Receiving
508.999.8028
ggula@umassd.edu

Facilities POC for Moving of Equipment:

David Macedo
Foster Admin Bldg
508.999. 8100

Forms:

- Change Equipment Location and/or Department Form
- Approval For Home or Off Property Use of University Equipment
- Lost or Stolen Inventory
- Return or Trade In
- Unusable Obsolete Property
- Usable Surplus Property
- Department Inventory Tracking Spreadsheet

All related forms are located on Property Control's Website.

<http://www.umassd.edu/administrativeservices/propertycontrol.cfm>

DEFINITIONS:

Custodian: Individual of which the equipment will be assigned as the primary user of equipment.

Location: Is the building and room equipment is to be located in.

Usable Equipment: Equipment that is still of value, is of condition that allows for reuse and would reasonably be of interest to another department.

Unusable Obsolete Equipment: Equipment that is no longer capable of reasonably performing its intended function, it of such age and wear that no useful life remains.

PROCEDURE:Property Location Change:

Once equipment has been tagged and inventoried, it should not be removed from its assigned accountable department, custodian or location, building or area without notifying the Property Control Office. Requests can be sent by email to ggula@umassd.edu or using the “Change Equipment Location and/or Department Form”

If emailing and there is a change in Department the email request should come from either the Dean, Department Head/Chair or Director. All required information in the form should be included in the email.

Form - “Change Equipment Location and/or Department Form”

Departmental Purchases for other Areas/Locations: On occasion departments purchase equipment that will be located or provided to another department. To insure proper tracking and stewardship, within the requisition in the notes indicate the ultimate custodians name, department and location. If this is not possible at the time of the order, an internal transfer of assets, after purchase needs to be completed using the “Change Equipment Location and/or Department Form”.

- Complete form indicating new location, Department and custodian. Be sure to include tag # of equipment being transferred.
- Form needs to be signed by Dean, Department Head/Chair or Director

Form - “Change Equipment Location and/or Department Form”

Equipment Return or Trade: When a equipment is traded in or returned to a supplier that has been tagged and inventoried by the University the equipment must be removed from the inventory database. This will ensure that the University is not carrying in inventory equipment that is no longer in its possession or control. The signature of the Dean, Department Head/Chair or director is required.

Form - Return or Trade-In of Equipment

Equipment Disposal: A “Declaration of Unusable Obsolete Property Form” needs to be completed when equipment is deemed to be obsolete or unusable. This form requires the signature of the person requesting removal, Department Chair person and Property Control.

- If you require moving services please contact facilities to coordinate pick up disposal of equipment.
- Computers and electronic equipment will be put into recycling center for the recycling of equipment. This is for equipment that will not go into land fill, but will not be re used by another department within the University.
- Indicate with in reason for disposal if equipment is to be disposed of or if should go into recycling.
- Form needs to be signed by Dean, Department Head/Chair or Director

Form - “Declaration of Unusable Obsolete Property Form”

Usable Surplus Inventory:

Usable surplus inventory is equipment that is still of value, is of condition that allows for reuse and is to be either inventoried within the department using UMD’s Freebay website or centrally in Property Controls Surplus inventory.

Surplus Inventory – Property Control

The “Declaration of Usable Surplus Inventory Form” should be used for Equipment that is going to be stored in Surplus Inventory. The department will need to coordinate with Facilities and Property Control to have equipment transferred to surplus inventory.

Form - “Declaration of Usable Surplus Inventory Form”

*This form is not to be used for equipment that is going to be located off Campus.

Surplus Inventory – Located In Department

Log inventory into UMD “Freebay”, listing equipment for use by other departments. Supplies and certain equipment should be listed here and maintained within the department. Examples of surplus office supplies and equipment are as follows:

Paper	Post Its	Toner Cartridges
Pencils	Adding Machines	Chairs
Desks	Computers	

See website for more information.

Home Off Site Approval Form: All laptop's and equipment removed from campus must have a completed and signed by all required individuals a "Approval for Home or Off Property Use Form". This includes all university equipment and inventory. If this form is not completed and it is discovered that an individuals has removed University Equipment, it will be deemed an unauthorized removal of equipment and the appropriate actions to recover equipment will be taken.

Form - "Approval for Home or Off Property Use Form"

Lost or Stolen Equipment: In the event that tagged inventory is lost or stolen departments/individuals are required to complete and submit to Property Control a "Lost or Stolen Inventory Report".

- It is the responsibility of the employee if equipment was located off campus and Department Staff to notify their director and Public Safety immediately should the equipment become lost or stolen.
- The employee/Department must go to the nearest Police station from where it was stolen and complete a Police Report detailing the incident.
- Once the report is complete you must notify and provide University's Public Safety Office with a copy of the report.
- Department/ Individuals are required to complete a Lost or Stolen Equipment form and submit to property control with a copy of the police report.

Form – Lost Stolen Equipment

Department Inventory "Purchases under \$1,000" with no tags: Departments, as the custodian of these assets, are required to keep inventory records of all equipment purchased using Account codes 763250 - Non Capital Equipment and 765250 - Federal Non Capital Equipment. These items should be recorded and tracked utilizing the Department Inventory Tracking spreadsheet.