



DEPARTMENTAL INVENTORY CONTROL PROCEDURE edited 12-2023

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: This guideline pertains 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 custodial and/or location changes, reporting of lost or stolen property, disposal of equipment and equipment located off campus.

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

Property Control:

Sharon Fusco

Power Plant/Receiving

508.999.8028

PropertyControl@umassd.edu

Facilities POC for Moving of Equipment:

Brian Hadley

508.999.8100

[Complete a Facilities Work Request through QuickLaunch](#)

CITS IT Service Center:

508.999.8790 (x8790)

[Complete a CITS case in QuickLaunch](#)

Forms:

- Change Equipment Location/Custodian Form
- Approval for Home or Off Property Use of University Equipment
- Lost or Stolen Equipment Report
- Asset Disposal Form/Unusable/Obsolete Property
- End of Employment Form

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

<https://www.umassd.edu/administrative-operations-compliance/property-control/>

DEFINITIONS:

Custodian: Individual of which the equipment is assigned to as the primary user of equipment.

Location: Is the building and room number the equipment(asset) is to be located in.

University Asset: Any item purchased using University funds.

Tagged assets: University assets over \$5,000 or any sensitive asset as defined by the Controller.

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

PROCEDURE:

Property Location Change Intra-Departmental:

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 are to be sent via email to Propertycontrol@umassd.edu with the completed "Change Equipment Location/Custodian Form". Emails, in order to be processed must contain all the required information to update the Equipment Asset Record and the completed form. Forms must be completed and signed for changes to be updated. ***There is no need for dept head signatures if asset is staying within the same department.***

Form - Change Equipment Location/Custodian Form

Property Location Change Inter-Departmental: 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. When transferring from one department to another please use the "Change equipment location/custodian" form. ***This form does need to be signed off on by both the releasing and the receiving department. ***

Form – Change Equipment Location/Custodian Form

Departmental Purchases for other Areas/Locations: On occasion departments purchase equipment that will be located in or provided to another department. To insure proper tracking and custodian, include within requisition notes 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/custodian form".

If the Change equipment location/custodian form is not completed the original department that purchased the equipment will continue to have the equipment show up on their inventory records and be responsible for the asset.

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

Equipment Return or Trade: When 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.
- Prior to trading in or returning of Computer equipment the hard drive must be certified by IT Service Center that they have either properly destroyed or wiped clean, of all data, associated hard drives. Contact IT Service Center to schedule a time to have your hard drive destroyed or data cleansed.
 - *Be sure to have CITS sign off on the form prior to sending to Property Control.*

Form - Asset disposal Form "unusable/obsolete"

Equipment Disposal: An "asset disposal 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 Chairperson and Property Control.

- When data holding devices, such as computers, are being disposed of, please enter a case in IT help. Follow the below steps when creating a case.

From the Quicklaunch tab: select IT help. Under "general IT service" select "hardware". Complete the form and select the device if listed. If device is not listed, select "asset or device not listed". Select "the device has a University asset tag". A pop-up box will appear that is called "asset lookup". Enter the tag number in the search box. Select the tag number when it appears. Asset disposal forms must be completed, signed and uploaded into IT help with the case.

- Prior to disposal of Computer equipment, the hard drives must be certified by IT Service Center that they have either properly destroyed or wiped clean, of all data, associated hard drives. CITS will determine if asset can be re-purposed and identify the new custodian on the disposal form. By creating a case in IT help, this process is started.
 - *Be sure to have CITS sign off on the form prior to sending to Property Control.*
- Submit form to Property Control and if requested they will enter a work order to have the equipment picked up and disposed.

- Form needs to be signed by Dean, Department Head/Chair or Director

Form - Unusable/Obsolete Property Form

Home Off Site Approval Form: Tagged assets removed from campus, must have this completed form. All signatures are required for individuals to remove assets from campus. "Approval for Home or Off Property Use From". is needed for all tagged university equipment and inventory with the exception of: laptops, iPads, tablets and cellular phones. These devices do not require the completion of a "Home Off Site Approval Form. If this form is not completed and it is discovered that an individual has removed University Equipment, it will be deemed an unauthorized removal of equipment and the appropriate actions to recover equipment will be taken.

Form - Home or Off-Site Approval From

Lost or Stolen Equipment: In the event that tagged inventory is lost, stolen or unaccounted for, departments/ individuals are required to complete a "Lost, Stolen, or Unaccounted for Equipment Report". When completing this form, a police report must be completed. If asset was lost or stolen off campus, a report must be filed with police at location of theft. When returning to campus, this form must be completed and a reporting is to happen with UMD Police. Once form is completed and report has been filed, paperwork is then sent to propertycontrol@umassd.edu

- It is the responsibility of the Custodian of the equipment and Department Staff to notify their director and Public Safety immediately should the equipment become lost or stolen.
- If the equipment was stolen off campus, the employee/Department must go to the nearest Police station with jurisdiction 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 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 \$5,000" 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 a Department Inventory Tracking spreadsheet.