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: 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 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 assign 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:
Sharon Fusco
Power Plant/Receiving
508.999.8028
PropertyControl@umassd.edu

Facilities POC for Moving of Equipment:
James Jerue
508.999. 8100
jjerue@umassd.edu

CITS IT Service Center:
Library Room 440
508.999.8790 (x8790)
Itscenter@umassd.edu

Forms:
- Change Equipment Location
- Approval For Home or Off Property Use of University Equipment
- Lost or Stolen Inventory
- 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 will be assigned as the primary user of equipment.

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

**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 can be sent by email to Propertycontrol@umassd.edu or using the “Change Equipment Location Form”. Emails, in order to be processed must contain all the required information to update the Equipment Asset Record.

Form - Change Equipment Location 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”. It will have to be signed off on by both the releasing and the receiving department.

Form – Change Equipment Location 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/custodian form”.

Form – Change Equipment Location 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.

- Complete form indicating new location, Department and custodian. Be sure to include tag # of equipment being transferred.
- Form needs to be signed by both 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**

**Equipment Disposal:** A “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 Chair person and Property Control.

- 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. 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.**
- 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 - Asset disposal form**
Home Off Site Approval Form: Sensitive equipment and equipment removed from campus must have a completed and signed by all required individuals a “Approval for Home or Off Property Use From”. This includes all tagged university equipment and inventory while excluding laptops. 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 From

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 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 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 the Department Inventory Tracking spreadsheet.