

## SECTION 6.05 – TRACKING OF CENTRAL INVENTORY

Purchasing @ Extension 4180

LITS @ Extension 4200

Maintenance @ 5200

### A. **Overview**

Tracking the movement of assets is crucial to maintaining accurate records for asset location, age, type and lifecycle. Proper notification of asset relocation will ensure data integrity and streamline the process of conducting annual inventory at your location.

### B. **References**

[Business Information Manual](#)

[Section 6.02](#) – Central Inventory Process

[Section 6.03](#) – Definition of Theft Sensitive Inventory

[Section 6.07](#) – Surplus of Furniture, Equipment and Books

[Policy 6570](#) – Property Records

[Board Policy 6113](#) – Disposal or Surplus of Assets

[Board Procedure 6113P](#) – Disposal or Surplus of Assets

**\*NOTE\* The information below applies to CENTRAL INVENTORY ONLY**

### C. **Moving Assets**

#### **Theft Sensitive Electronics:**

- Staff should submit a [Help Desk Request](#) to move theft sensitive electronics. If you need help submitting the request, please contact the LITS department for assistance.

#### **Moving Furniture, Equipment and Non-Technology Assets:**

- A [Property Transaction Form](#) must be submitted to Purchasing before furniture, equipment or non-technology asset can be moved. If you need help filling out the form, please contact Purchasing for assistance.
- Staff should submit a [School Dude Request](#) to move furniture, equipment, or non-technology asset. If you need help submitting the request, please contact Maintenance for assistance.
- Items waiting to be moved should be stored together in a clearly defined area and should have a copy of the completed Property Transaction Form attached.

- Purchasing accomplishes the following:
  - Reviews forms for adequate information – clarify if needed
  - Assigns a Record Number to the Property Transaction Form
  - Scans and emails the Property Transaction Form to Maintenance
  - Retains the Property Transaction Form
- Maintenance accomplishes the following:
  - Inputs the Record Number into the School Dude System
  - Assign a Work Order Number on the Property Transaction Form
  - Records the date of completion of the transaction and Signs the Property Transaction Form
  - Sends the completed Property Transaction Form back purchasing

## **D. Stolen or Damaged Assets**

- Staff should send the original [Property Report Form](#) to General Counsel.
- All district property theft and vandalism claims should be reported to law enforcement within 24 hours of the incident.

### **Stolen or Damaged Theft Sensitive Electronics:**

- Staff should submit a [Help Desk Request](#) and attach a copy of the [Property Report Form](#) to the request within 24 hours of the incident. If you need help submitting the request, please contact the LITS department for assistance.
- If the theft sensitive electronic is reported as **Missing**, the LITS department will track the asset after they receive the Help Desk Request for a 6 month period.

### **Stolen or Damaged Furniture, Equipment or Non-Technology Assets:**

- Staff should submit a [School Dude Request](#) and attach a copy of the [Property Report Form](#) to the request within 24 hours of the incident. If you need help submitting the request, please contact the Maintenance department for assistance.

## **E. Surplus or Disposal of Assets**

### **Surplus of Theft Sensitive Electronics:**

- Staff should submit a [Help Desk Request](#) to request to surplus theft sensitive electronics. If you need help submitting the request, please contact the LITS department for assistance.
- LITS will determine if the asset is in working condition and can be reused within the district. If the item is in poor condition or would be too costly to fix, LITS should start the surplus process.

- If LITS determines the asset should be surplus, they should email an [Electronic Surplus Form](#) & **Supporting Documentation** to a LITS Director for approval.
- After the Electronic Surplus Form & Supporting Documentation have been approved, LITS should email these forms to [procurement@everettsd.org](mailto:procurement@everettsd.org)
- The [Surplus Form](#) should include:
  - Department, Name of Requestor & Contact Number
  - Request Number & Asset Location(s) in the description box  
(Ex: LITS Surplus Request #1 - FVE, LITS Surplus Request #2 - WOE, etc.)
  - Disposal Method (to be sold, disposed, recycled, etc)
  - Signature on the form OR emailed Approval from a LITS Director
- The [Supporting Documentation](#) should include the following:
  - Asset Tag Number
  - Make
  - Model
  - Quantity
  - Notes if applicable (Ex: Gaylord 212)
  - Formatted in PDF
- Purchasing will review for completeness and send the forms to the Board of Directors.
- After the Board of Directors approves the Surplus Request, LITS can dispose of the assets in their Asset Management System
- LITS may **NOT** remove, surplus or scrap any asset until the Board of Directors has approved it
- If the asset is sent for scrap for parts, the vendor should send back the Asset Tag and Serial Number. LITS will store this information internally.
- When LITS surpluses an asset in their Asset Tracking System, they will reference the Board of Director's Surplus Approval Date

**Surplus of Furniture, Equipment or Non-Technology Assets:**

- Staff should submit a [School Dude Request](#) and attach a copy of the Property Report Form to the request. If you need help submitting the request, please contact the Maintenance department for assistance.
- Maintenance will determine if the asset is in working condition and can be reused within the district. If the item is in poor condition or would be too costly to fix, Maintenance should start the surplus process.
- If Maintenance determines the asset should be surplus, they should send a Paper [Surplus Form](#) to their Director for approval.
- The Paper [Surplus Form](#) should include:
  - Asset Tag, Equipment or Vehicle Number
  - Make
  - Model
  - Quantity
  - Notes if applicable (Ex: Gaylord 212)
- Purchasing will review Maintenance's Surplus Form for completeness and send the form to the Board of Directors.
- After the Board of Directors approves the Surplus Request, Maintenance can dispose of the assets in their Asset Management System
- Maintenance may **NOT** remove, surplus or scrap any asset until the Board of Directors has approved it

**F. LITS & Purchasing Asset Tracking Procedure**

- LITS will send Purchasing a [Quarterly Data Pull](#) from their Asset Management System, in lieu of a Property Transaction Form.
- **The Data Pull should only include New or Modified Assets from:**
  - **Quarter 1** – September 1<sup>st</sup> to November 30<sup>th</sup> (Beginning of School Year)
  - **Quarter 2** – December 1<sup>st</sup> to February 28<sup>th</sup> or 29<sup>th</sup>
  - **Quarter 3** – March 1<sup>st</sup> to May 31<sup>st</sup>
  - **Quarter 4** – June 1<sup>st</sup> to August 31<sup>st</sup> (End of School Year)

- Examples of Modified Assets include, but are not limited to:
  - Location Changes
  - Staff or Student Assignment
  - Surplus or Repairs

**\*Note\*** The Data Pull will only include information that was added or modified in LITS's Asset Management System during the specified timeframe. The data does not go off of the Asset's In-Service Date

- The LITS Data Pull should be sent to Purchasing on the following dates:
  - **October 1<sup>st</sup>** - Data from Quarter 1
  - **March 1<sup>st</sup>** - Data from Quarter 2
  - **June 1<sup>st</sup>** - Data from Quarter 3
  - **August 31<sup>st</sup>** - Data from Quarter 4

**\*Note\*** If the date falls on a weekend or holiday, send the data pull the next applicable business day

- The LITS Data Pull should include the following:
  - An Excel Spreadsheet in a ".CSV" format
  - All Capital Letters for text
  - No Dashes, Semi-Colons or any Special Characters. Use a space instead

Column Header	Data in Cell
Asset Tag	Asset Tag Number
Status	Status of the Asset (Ex: Available, Checked Out, Surplus, etc)
Description	Description (Ex: Chromebook, Mobile Hotspot, Student Tablet, etc)
Make	Make (Ex: Apple)
Model	Model (Ex: iPad 32 GB)
Serial Number	Serial Number
Location	2 – Digit Location Code
Room	Room Name or Number (if applicable) <b>*Note*</b> only 4 Characters can be used Use "OFFI" for office and "LBRY" for library
Notes	Cart Number, Gaylord or other Miscellaneous Information
Employee Assigned To	Employee ID Number
Student Assigned To	Student ID Number
In-Service Date	Date the Asset was physically received. Use the invoice date, if receive date is unknown (mm/dd/yyyy)
PO Number	Lists the PO Number or "PCARD" if purchased using district credit card

- The LITS should email the excel spreadsheet to a LITS Director for Approval.
- After the Director approves, the excel file & approval should be emailed to [procurement@everettsd.org](mailto:procurement@everettsd.org)
- Purchasing will add or modify the following information into LITS's spreadsheet:

Column Header	Data in Cell
Status	Change all of LITS's Statuses to either: "AC" for Active Assets "DI" for Surplused Assets "IN" for Missing Assets during waiting period
PC	Primary Code (Ex: CP - Computers, TS -Theft Sensitive, etc)
SC	Secondary Code (Ex: 720 – Computers, 740 – Theft Sensitive, etc)
Qty	1
Rpid	7500
Roomdesc	Last day of the Quarter (yyyymmdd)
Contact	LITS's notes (Cart or Gaylord #, etc)
Addr1	Employee ID Number
Addr2	Student ID Number
<b>*NOTE* The information below is only needed for New Assets that were added during the reconciled Quarter</b>	
PEID	Vendor's PEID Number
Contract	Contract Number (if applicable)
Itemamt	Asset's Unit Price (with tax)
Invamt	Total PO's Dollar Amount (with tax)
Ck	Check Number (if applicable)
Invoice	Invoice Number (if applicable)
Key	FQA Code (no spaces or dashes)
Obj	Object Code

- Purchasing will then sperate the information into 3 separate excel spreadsheets, using the CSV format:
  1. FAINDT
  2. FASITE
  3. FAPPO
- The Purchasing Supervisor will upload the 3 spreadsheets into BPlus and verify that the upload was successful
- Purchasing and LITS will work together to remedy any discrepancies