ESSM Departmental Inventory Procedures

I. Assignment of Asset Numbers

A. TAMU (Texas A&M University) - Campus Code 02

A-1) Non-Computer Equipment

Asset numbers will be assigned by the Business Office to equipment during the payment process. When an invoice is received that requires an inventory number the following steps will be taken:

1) The location of the equipment will be determined. An email will be sent to the purchaser and the following information will be requested - building name/number, room number, and faculty member's name, the person who is responsible for the equipment.

2) The Business Office will assign a "temporary" interdepartmental inventory number.

3) The departmental student worker and/or the designated employee will deliver the interdepartmental inventory number to the building/room, locate the asset, and place the number on the asset.

4) The departmental student worker and/or the designated employee will sign and date the ESSM Inventory Tag Log Sheet after placing the interdepartmental inventory number on the equipment.

5) When the permanent asset number is assigned and received, the departmental student worker and/or the designated staff employee will deliver the inventory number to the building/room, locate the asset, place the number on the asset, and write the asset number on the equipment with a black or white permanent marker by hand.

Asset numbers received from TAMU may not be available for 4 to 6 weeks.

6) The departmental student worker and/or the designated employee will complete the Ecosystem Science & Management Asset and Tag Information Sheet after placing the asset number on the equipment. The ESSM Asset and Tag Information Sheet must be completed and returned within 3 business days.

Please note that asset numbers will not be left with other employees to place on the equipment. If the equipment is not available for the asset number to be placed on it, arrangements will be made to come back later.
Within ten (10) working days of receipt of property, the item should be properly tagged and marked with an assigned inventory numbered decal.

A-2) Computer Equipment

Asset numbers will be assigned to equipment during the payment process. When an invoice is received that requires an inventory number the following steps will be taken -

1) The location of the equipment will be determined (building name/number, room number, and faculty member’s name, the person who is responsible for the equipment)

2) The Business Office will assign a “temporary” interdepartmental inventory number

3) The departmental IT support staff will be contacted and the “temporary” interdepartmental inventory number will be picked up from the Business Office by the departmental IT support office. They will be responsible for placing the number on the asset.

4) The IT support staff will sign and date the ESSM Inventory Tag Log Sheet when picking up the “temporary” interdepartmental inventory number for the equipment

5) When the permanent asset number is assigned and received, the IT support staff will deliver the inventory number to the building/room, locate the asset, place the number on the asset, and write the asset number on the equipment with a black or white permanent marker by hand.

Asset numbers received from TAMU may not be available for 4 to 6 weeks

6) The IT support staff will complete the ESSM Asset and Tag Information Sheet after placing the asset number on the equipment. The ESSM Asset and Tag Information Sheet must be completed and returned within 3 business days.

Please note that asset numbers will not be left with other employees to place on the equipment. If the equipment is not available for the asset number to be placed on it, arrangements will be made to come back later.

Within ten (10) working days of receipt of property, the item should be properly tagged and marked with an assigned inventory numbered decal.
B. Texas AgriLife Research - Campus Code 06

B-1) Non-Computer Equipment

Asset numbers will be assigned by the Business Office to equipment during the payment process. When an invoice is received that requires an inventory number the following steps will be taken -

1) The location of the equipment will be determined. An email will be sent to the purchaser and the following information will be requested - building name/number, room number, and faculty member’s name, the person who is responsible for the equipment.

2) The permanent asset number will be assigned and the departmental student worker and/or the designated employee will deliver the inventory number to the building/room, locate the asset, place the number on the asset, and write the asset number on the equipment with a black or white permanent marker by hand.

3) The departmental student worker and/or the designated employee will complete the ESSM Asset and Tag Information Sheet after placing the asset number on the equipment. The ESSM Asset and Tag Information Sheet must be completed and returned to the Business Office within 3 business days.

Please note that asset numbers will not be left with other employees to place on the equipment. If the equipment is not available for the asset number to be placed on it, arrangements will be made to come back later.

Within ten (10) working days of receipt of property, the item should be properly tagged and marked with an assigned inventory numbered decal.

B-2) Computer Equipment

Asset numbers will be assigned to equipment during the payment process. When an invoice is received that requires an inventory number the following steps will be taken -

1) The location of the equipment will be determined (building name/number, room number, and faculty member’s name, the person who is responsible for the equipment)

2) The permanent asset number will be assigned and the IT support staff will deliver the inventory number to the building/room, locate the asset, place the number on the asset, and write the asset number on the equipment with a black or white permanent marker by hand.

3) The IT support staff will complete the ESSM Asset and Tag Information Sheet after
placing the asset number on the equipment. The ESSM Asset and Tag Information Sheet must be completed and returned to the Business Office within 3 business days.

Please note that asset numbers will not be left with other employees to place on the equipment. If the equipment is not available for the asset number to be placed on it, arrangements will be made to come back later.

Within ten (10) working days of receipt of property, the item should be properly tagged and marked with an assigned inventory numbered decal.

C. Texas AgriLife Extension - Campus Code 07

C-1) All Inventory Equipment

Asset numbers will be assigned by the Business Office to equipment during the payment process. When an invoice is received that requires an inventory number the following steps will be taken -

1) The location of the equipment will be determined. An email will be sent to the purchaser and the following information will be requested - building name/number, room number, and faculty member’s name, the person who is responsible for the equipment.

2) The permanent asset number will be assigned and the inventory tag will be mailed to the responsible person. They will locate the asset, place the number on the asset, and write the asset number on the equipment with a black or white permanent marker by hand.

3) The responsible person will complete the ESSM Asset and Tag Information Sheet after placing the asset number on the equipment. The ESSM Asset and Tag Information Sheet must be completed and returned to the Business Office within 3 business days.

Within ten (10) working days of receipt of property, the item should be properly tagged and marked with an assigned inventory numbered decal.

II. Placement of Inventory Numbers

1) Indoor Equipment (office and laboratory) - tags, decals, or other inventory identification markings should be placed in a consistent, and visible location with minimum damage to the item. Placement should be made so the equipment does not have to be moved to locate the tag. This will assist in eliminating damage to the item.

2) Motor Vehicles - tags or decals should be placed inside the door of the glove compartment
3) Farm Vehicles - tags or decals should be placed on or near the steering column. Paint, etching, or other permanent method may also be used if practical.

4) Farm Machinery - tags or other permanent markings should be placed on the machinery in a consistent, visible location with minimum damage to the property.

5) Other - all other property should be tagged or marked in a consistent, visible location, and easy to see when approaching equipment. Placement should be made so the equipment does not have to be moved to locate the tag. This will assist in eliminating damage to the item.

Reminder - In addition to asset tags, asset numbers must be handwritten in black or white permanent marker.

III. Annual Inventory Certification

A. TAMU (Texas A&M University) - Campus Code 02 & Texas AgriLife Research - Campus Code 06

The department will conduct two annual inventory certifications during the fiscal year. During the certifications, all inventory items must be located and verified. The AgriLife certification will be completed in the Summer (July/August) and the TAMU certification will be completed in early Spring (March/April). These dates are subject to change.

Each faculty member is responsible for providing the Business Office with one individual (called "proxy") within their area that will work with our departmental inventory contact tech (Andy or Tim) to complete the annual certification. This individual needs to have knowledge of the equipment and will be responsible for locating all of the equipment prior to meeting with the inventory tech.

The faculty member and their proxy will be provided with a list of inventory items each fiscal year during the certification. The faculty member or proxy must contact the departmental inventory tech within 10 days to make arrangements for inventory verification.

The faculty member or proxy must locate all of the items, verify tag number and location (building and room number) and add handwritten asset number with permanent marker if missing. Once this is complete, THEN contact the departmental inventory tech for final verification. Please note that the department inventory tech is NOT responsible for finding the equipment. They are there to conduct the final verification.
Items that are located away from the office or at home **MUST** be brought into the office for verification. Large items such as a desktop computers, printers, etc. will be exempted from this requirement.

For TAMU asset numbers, each item will be located and scanned by the departmental inventory tech using the assigned scanner from TAMU property. For AgriLife asset numbers, each item will be located and the individuals will need to initial each asset number on the certification form. The State requires that each asset must be verified by two individuals.

The department will spot check asset locations during the fiscal year every quarter. Individuals will be contacted by the departmental inventory tech as needed to conduct the verification.

**B. Texas AgriLife Extension - Campus Code 07**

The department will conduct one annual inventory certifications during the fiscal year. During the certifications, all inventory items must be located and verified. The AgriLife certification will be completed in the Summer (July/August). This date is subject to change.

Each faculty member will receive a list of their inventory items each fiscal year during the certification from the Associate Department Head. The faculty member and one other employee must locate all of the items, verify tag number and location (building and room number), and sign off on each item. Once the certification is complete, return the completed form to the Associate Department Head.

**IV. Sign Out Sheets**

Inventory items used during travel or located at home must have a “Sign Out Sheet” on file with the Business Office. *Each year a new sign out sheet is required during the annual certification.*

Sign out sheets are attached at the end of the procedures. Please note that there are two different sign out sheets 1) for TAMU and 2) for AgriLife.

When asset numbers are initially assigned a sign out sheet will be sent to the faculty member responsible for completion. The completed sign out sheet must be returned to the Business Office within 10 business days.

**V. Disposition of Property**

Disposition of property will be conducted by the following methods.

**A. Transfers (Including Surplus)**
I. Computers (and/or any equipment with internal hard drives)

1. Releasing faculty member (or designated employee) fills out the ESSM departmental request to transfer property form and submits it to the building contact according to the current location of the equipment as noted below –

   Animal Industries Building - JoAnna Price  
   Horticultural Forest Science Building - Sandy Klepacz  
   Centeq - Lesli Gomez  
   Range Area - Andy Crane  
   Forest Science Laboratory - Tim Rogers  
   Houston Building - Sandy Klepacz  
   Herbarium - JoAnna Price  
   Off-Campus Extension Specialist - Sandy Klepacz

2. The building contact checks the list for accurate, signs off on the form, and submits it to the departmental IT support staff.

3. The departmental IT Support will check the list for accurate, remove and/or erase the hard drive(s), sign off on the form, and returns the form to the building contact.

4. The building contact submits the completed form to the Business Office.

5. The Business Office will complete the necessary online transfer and routes the document to the Property Office for approval.

6. Upon approval of the transfer, a copy (print screen) of the transfer will be returned to the building contact if surplus will pick up the items. If the items will be delivered to surplus, the form will be returned to the contact person that will be delivering the item(s) to surplus.

7. **A SIGNED copy of the transfer form (SIGNED BY SURPLUS) MUST be returned to the Business Office within 3 business days after delivery of equipment to Surplus or when items are picked up by Surplus.**

II. Non-Inventory and/or non-computer equipment

1. Releasing faculty member fills out ESSM transfer of property form and submits the form to the building contact according to the current location of the equipment as noted below –
2. The building contact signs off on the ESSM transfer of property form, checks the list for accurate, and submits to the Business Office.

3. The Business Office will complete the necessary transfer online transfer and routes the document to the Property Office for approval.

4. Upon approval of the transfer, a copy (print screen) of the transfer will be returned to the building contact if surplus will pick up the items. If the items will be delivered to surplus, the form will be returned to the contact person that will be delivering the item(s) to surplus.

5. **A SIGNED copy of the transfer form (SIGNED BY SURPLUS) MUST be returned to the Business Office within 3 business days after delivery of equipment to Surplus or when items are picked up by Surplus.**

B. Sale

I. Vehicles (Research only)

1. Contact the Business Office for instructions; Vehicles are sold through an online system - Lonestar Auction

C. Missing or Stolen

If equipment is found to be missing during the annual certification, it will be reported to the Property Office and the State at that time. During the year, if you find that equipment is missing and/or stolen, please report it immediately to the Business Office.

For items that are stolen, a police report needs to be filed immediately. A copy of the police report will need to be provided to the Business Office.

If stolen or missing property is recovered, please let the Business Office know immediately.
All missing inventory will remain on the departmental inventory list for 2 years after the first reporting is filed.

D. Relocating Equipment within the Department

It is the responsibility of the faculty member and/or the IT support staff to send written notification to the Business Office when equipment is relocated from one location to another. The written notification must include a list of the item(s) with the asset numbers as well as the new location (building and room numbers). If the responsible person is changing, approval must also be received from the faculty member accepting the item(s) before the information is updated in the system.

Questions -

Please contact Sandy Klepacz at 979-845-5034 or SLKlepacz@ag.tamu.edu.
This completed and signed form documents the loan of the following property:

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This is a (check one):

- _Short-term loan (less than 30 days) To be returned on or before: ____________________

- _Long-term loan (greater than 30 days) To be returned on or before: ____________________

I, ____________________________, understand that I am responsible for the property listed above while it is on loan to me. I will exercise reasonable care of this equipment and safeguard it against theft, damage and misuse. I will use this equipment only for activities benefiting Texas A&M University. I will return the property by the date listed above or upon separation from the University.

X ____________________________ Date __________
Signature Date

Approval of Loan:

_____________________________ ____________________________
Department Head/Director/ Departmental Property Contact Printed Name

_____________________________ Date __________
Department Head/Director/ Departmental Property Contact Signature

_Do not submit to Property Management. Please retain for your departmental inventory records._
Texas A&M AgriLIFE Property used away
From assigned location

This completed and signed form documents the following property:

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<th>Inventory Number</th>
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This is a (check one):

____ Short-term (less than 30 days) To be returned on or before: ______________________

____ Long-term * (greater than 30 days) To be returned on or before: ______________________

* Must be updated annually

I, ___________________________________________ understand that I am responsible for the property listed above. I will exercise reasonable care of this equipment and safeguard it against theft, damage and misuse. I will use this equipment only for activities benefiting Texas A&M AgriLIFE. I will return the property upon separation from Texas A&M AgriLIFE.

Signed,

__________________________________________                        ______________
Signature                                Date

Approval of Loan:

__________________________________________                        ______________
AAPO/APO                                  Date

**PLEASE DO NOT RETURN THIS FORM TO THE PROPERTY MANAGER; TO BE KEPT ON FILE BY THE AAPO.**