



## **MATERIAL TRANSFER PROCEDURE (INV-P003)**

Clarksville-Montgomery County School System

### **1.0 SCOPE:**

- 1.1 This procedure outlines the process of transferring material from one facility to another for both accountable and non-accountable items.

The online version of this policy is official.  
Therefore, all printed versions of this  
document are unofficial copies.

### **2.0 RESPONSIBILITY:**

- 2.1 Property Control Officer (PCO)

### **3.0 APPROVAL AUTHORITY:**

- 3.1 Chief Financial Officer

### **4.0 DEFINITIONS:**

- 4.1 Accountable Item: Defined in INV-G001 Inventory Guidelines
- 4.2 Inventory Control Representative (ICR): Designated individual at each building location who is a point of contact for that building relating to property inventory.
- 4.3 PCO: Property Control Officer

### **5.0 PROCEDURE:**

- 5.1 CMCSS personnel requiring transfer of property completes, signs, and dates Material Transfer Form (ref. [INV-F004](#)) and contacts Warehouse to schedule transfer.
  - 5.1.1 For accountable items, the ICR is responsible for initiating the Material Transfer Form. The Technology Department is responsible for completing the Material Transfer Form for all desktop and laptop computers and servers.
  - 5.1.2 All accountable items will use the asset software to initiate the Material Transfer Form. The user's email address will be the "signature" in the Transferring field on the form.
  - 5.1.3 Any transfers of CTE (Vocational), Federal, or Special Education items must be communicated to the appropriate personnel in the Instruction Department. In the asset software system, this will be done automatically by email for accountable items only.
  - 5.1.4 If there are a large number of items that need to be transferred, an Excel spreadsheet may be submitted by email to the PCO and Warehouse Foreman instead of completing the Material Acquisition Form as long as **all** the information from the form is included in the Excel spreadsheet. Signatures from the Warehouse and Receiving location are still required.
- 5.2 Warehouse personnel transfers material to new location and signs and dates Material Transfer Form.



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5.2.1 For accountable items, a notification will come through the asset software via email. The Warehouse personnel will print the Material Transfer Form they receive via email to obtain the required signatures.

5.3 Receiving facility personnel signs and dates Material Transfer Form.

5.3.1 A copy of the signed form is given to Receiver to file for their records.

5.4 Warehouse personnel keeps a copy of the signed Material Transfer Form for their records and forwards the completed form to the Property Control Officer.

5.5 Property Control Officer enters material transfer into the ERP inventory control database.

5.5.1 The asset software will be updated automatically as it is integrated with the inventory control database.

5.5.2 Student laptops that are moved between school locations automatically update the ERP system location once it is assigned to students. Transfers of student laptops to the repair area at central office are to be entered in the asset software by technology personnel as a location change when they arrive and leave the repair area.

5.5.3 Material Transfer Form is filed.

### **6.0 ASSOCIATED DOCUMENTS:**

6.1 Material Transfer Form ([INV-F004](#))

6.2 Inventories ([INV-A001](#))

6.3 Inventory Guidelines ([INV-G001](#))

6.4 Property Inventory Control ([INV-P001](#))

### **7.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Material Transfer Form	PCO Office	Current year plus one	Discard as Desired	Secured Building



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### **8.0 REVISION HISTORY:**

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
7/20/05		Initial Release
3/7/16		Updated logo and hyperlinks.
10/5/16	A	Changes throughout to align with new software system. Updated associated documents.
3/6/19		Updated hyperlinks, not a revision.
6/5/23	B	Update definitions and updated the student laptop transfers to repairs shop

### **9.0 FLOWCHART:**

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

**\* \* \* E n d o f P r o c e d u r e \* \* \***

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