
**Inventory Control Procedure for
Mass Equipment Receipt (INV-P005)**
Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the manner in which mass equipment, classified as accountable, is established, received, and processed into the inventory tracking system.

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
2.2 Technology Network Manager/Senior Network Technician

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Financial Officer

4.0 DEFINITIONS:

- 4.1 Accountable Item: Property that has an acquisition value of at least \$5,000 or is included in the "sensitive equipment" list established by the CFO with an acquisition value of at least \$500. Also includes items with an acquisition value of at least \$100.00 for equipment purchased with Federal funds.
- 4.2 CMCSS barcode: Inventory control tag for CMCSS
- 4.3 ICR: Inventory Control Representative - Designated individual at each building location who is a point of contact for that building relating to property inventory.
- 4.4 PCO: Property Control Officer
- 4.5 TC: Technology Coordinator
- 4.6 Purchasing Agent: Performs administrative activities pertaining to the purchase of materials, supplies, and equipment for the school system.
- 4.7 Mass equipment: Quantity of 20 or more Technology items, as identified on the Sensitive Item List.
- 4.8 Inventory Custodian: Individual accountable for a specific Technology property item on the Sensitive Item List at a designated location.
- 4.9 Surplus Property: Property no longer having an intended use by CMCSS at the current location and/or no longer capable of being used because of condition.
- 4.10 Sensitive Item List: Items that are identified as sensitive equipment for the purposes of property inventory if the acquisition cost is at least \$500.00.

5.0 PROCEDURE:

- 5.1 Purchase order established by originator.

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- 5.1.1 Purchasing Agent sends copy to the appropriate person at the “ship to” address on the purchase order.

Schools: Bookkeeper

Central Office: Warehouse Manager

Greenwood: Help Desk Technician

Operations: Technology Coordinator

5.2 When accountable items are received at locations;

- 5.2.1 Appropriate technician (Network Manager, Senior Network Technician, or Help Desk Technician) obtains and signs for sufficient number of CMCSS bar-code labels from PCO utilizing form INV-F011.

- 5.2.2 Appropriate technician places barcodes on new equipment and populates electronic form number INV-F012, according to work instruction # INV-W001.

- 5.2.3 When all equipment has been labeled with bar codes and all pertinent information is completed on form INV-F012, form will be e-mailed to System Administrator and ICR, and will be communicated by the appropriate technician to the PCO.

- 5.2.4 System Administrator will import data from form INV-F012 into MUNIS.

- 5.2.5 System Administrator forwards copy of INV-F012 to PCO, notifying PCO of Imported data.

- 5.2.6 PCO validates data input and updates INV-F011 for completion.

5.3 If equipment is received at the Central Office warehouse;

- 5.3.1 The warehouse manager or warehouse associate takes the bill of lading and purchase order copy to the ICR in the Technology Department (Technology Coordinator or the Administrative Assistant).

- 5.3.2 Warehouse manager or warehouse associate gives a copy of the purchase order to the PCO.

- 5.3.3 PCO retains purchase order copy in a file, and checks file weekly to ensure that inventory remaining in warehouse is accurately accounted for.

5.4 Items are subject to all of the following physical inventories.

- 5.4.1 Annual

- 5.4.2 10% unannounced

- 5.4.3 End of employment

- 5.4.4 Items equal to or greater than \$500.00 acquisition value

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- 5.5 An updated inventory listing is provided to each building location at least annually. Listings are also provided on request.
- 5.6 A report of items with an acquisition value of at least \$500.00 is prepared as of June 30 of each year and forwarded to the Business Manager for purposes of updating accounting records.
- 5.7 The PCO is notified of changes in location and/or inventory custodian by the ICR using the Request for Change of Assets Form (INV-F002).
- 5.8 The ICR provides the PCO with an annual bulk item count on the Room Inventory Form (INV-F005).

6.0 PERFORMANCE MEASURES:

- 6.1 Lost/Stolen Inventory Report

7.0 INTERACTIONS:

7.1 OTHER DEPARTMENTS:

- 7.1.1 Technology Department
- 7.1.2 All CMCSS locations

7.2 OTHER PROCEDURES/PROCESSES

- 7.2.1 INV-P001 Property Inventory Control Procedure

8.0 ASSOCIATED DOCUMENTS:

- 8.1 Equipment Acquisition Form ([INV-F006](#))
- 8.2 Request for Change of Assets Form ([INV-F002](#))
- 8.3 Inventory Guidelines ([INV-G001](#))
- 8.4 Room Inventory Form ([INV-F005](#))
- 8.5 Electronic Mass Equipment Receipt Form ([INV-F012](#))

9.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Equipment Acquisition, Request for Change of Assets & Room Inventory forms	File cabinets	Seven years	Recycle	Secured building
Data base	Computer	Indefinite	N/A	Daily backup, stored off-site

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10.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/9/10		Initial Release
3/6/19	A	8.3, replaced Sensitive Equipment List with Inventory Guidelines (INV-G001). Updated hyperlinks and logo. Removed flowchart.

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