

INSTITUTIONAL DIRECTIVE 3-3

March 20, 2006

Title: Piedmont Technical College Accountability for Equipment Assets

I. Purpose

The purpose of this directive is to establish responsibilities for equipment accountability.

II. Policy

It is the policy of Piedmont Technical College to maintain strict accountability and control of all Federal, State, Local, and Foundation equipment.

III. Responsibilities

A. The Inventory Control Specialist is responsible for:

1. Conducting an annual inventory of departmental equipment with department heads/area supervisors. The inventory must be finalized by May 31st of each year.
2. Spot checking selected items in each department at various times (approx.2) throughout each year.
3. Insuring proper use of equipment through quarterly inspections.
4. Securing approval from the President of the college for Federal, Local, State, and Foundation for lending equipment by completing a Piedmont Tech Equipment Sign Out Sheet. A copy of the approved form will be sent to the Inventory Control Specialist. A Sign Out Sheet should be on file in each department for all laptop computers. (Attachment A)
5. Ensuring, by frequent communications/orientations with account holder, that equipment is not used for personal convenience or gain.
6. Maintaining current records on the status of all equipment.

B. Department Heads, Area Supervisors and Account Holders are:

1. Responsible for the proper use, maintenance, security and protection of all equipment in their custody.
2. Notifying the Inventory Control Specialist when loaning equipment within the College (Equipment will not be used for non-school purposes). Before moving equipment from the college, the "Piedmont Tech Equipment Sign Out Sheet" must be completed. The proper signatures must be obtained. A copy of the form will be sent to the Inventory Control Specialist. (Equipment will not be used for non-school purposes). (Attachment A.)
3. Responsible for notifying the Inventory Control Specialist when equipment is moved inter-departmentally. Equipment transfers will be reported on Equipment/Furniture Transfer (Attachment B) and emailed to the Inventory Control Specialist. The Inventory Control Specialist will update the inventory system in the Fixed Asset Module with the new department number and new location. (Attachment B)

Office of Responsibility: Vice President for Business and Finance

4. Conducting a joint annual and sample inventory with the State Inventory Manager for all State, Federal, and local equipment.
 5. Conducting a full departmental inventory when an employee assumes an account or when an account holder transfers to another department or when an account holder ceases employment at Piedmont Tech. Clearance will be released by the Equipment Coordinator only after satisfactory completion of the inventory. (Attachment C)
- C. Non-capitalized inventory is defined as equipment (state, federal, and local), which costs at least \$1,000 but less than \$4,999, and has a useful life greater than one year. It is recommended by the State Board for Technical and Comprehensive Education that these items are tagged with a state bar code identification number (Z) by the Inventory Control Specialist.
- D. Pilferable equipment is defined "high theft" equipment, which cost between \$500 and \$999 and has a useful life greater than one year. It is recommended by the State Board for Technical and Comprehensive Education that these items are tagged with a state bar code identification number (Z) by the Inventory Control Specialist.

IV. Accounting Procedures

- A. All equipment purchased by the college, the Foundation or items donated will be processed through the Receiving Department. Any equipment picked up by account holder or representative must take item to Receiving to have inventory recorded.
1. The Foundation will submit a copy of all documentation related to equipment (purchased or donated) to the Inventory Control Specialist. This documentation will include all necessary information needed to affix a Foundation inventory tag and deliver to designated party. Donated equipment which is considered to be scrap material will not be tagged. Equipment no longer being utilized or turned into the Inventory Control Specialist will be disposed of unless a letter is submitted by the Department Head to Inventory Control stating that the equipment will be put to use within a six month time frame.
 2. A copy of all equipment purchase orders issued by the college will be sent to the Inventory Control Specialist.
- B. All major non-expendable items/equipment (State, Federal, and Local) (\$5,000 and above) purchased by the college will be tagged with a State Bar Code Identification Number (Z) by the Inventory Control Specialist. This equipment is referred to as "capitalized inventory". All equipment information, including the accounting data, (Attachment E) will be maintained in the Fixed Asset Module and on the SC State Technical System Automated Inventory Module (AIMS).
- C. All equipment (State, Federal, and Local) (with a value greater than \$1,000.00 or a year's life expectancy) not exceeding \$4,999 and equipment defined as pilfer able (999 or less) purchased by the State (regardless of fund code) will be tagged with a State Bar Code Identification Number (Z) by the Inventory Control Specialist. This equipment is referred to as "non-capitalized inventory". All equipment information, including the accounting data, will be maintained on the SC State Technical System Automated Inventory Module (AIMS) for accountability.

- D. State, Federal, and local equipment that will be traded-in on the purchase of like items must be submitted to the State Inventory Control Office on an MMO Form 137 (Attachment I) along with a letter from the vendor stating the exact trade-in value or allowance for the item. Upon approval, that item is deleted from the inventory and the value is applied directly to the purchase of like items. A record of Trade-In Sales is submitted quarterly to the Materials Management Officer. Foundation Inventory will be controlled by the Foundation and will not need authorization from any other agency or department.
- E. All State, Federal, Foundation, and Local equipment which is deemed no longer of value to the college will be reported to the Inventory Control Specialist by the account holder or Department Head/Area Supervisor. The procedure listed below will be used to report State and Local equipment to the State Equipment Manager:
 - 1. Separate by type:
 - a. Unserviceable
 - b. Excess
 - c. Obsolete
 - 2. Complete Turn-In Document (AIMS) (Attachment F)All equipment on TID that is declared by State Equipment Manager as:
 - a. Surplus will be picked up and transferred to Surplus Property.
 - b. Junk will become the property of Piedmont Technical College which will be disposed by:
 - (1) Seal Bid Process - An ad will run in local newspaper advertising sale. Highest bidder will be declared the winner.
 - (2) After the sale any remaining items will be sold through recycled methods as scraps wastes.
 - (3) Landfill

V. Inventory Procedures

- A. September through May.
- B. The annual inventory (State, Federal, and Local, equipment) will be conducted by the account holder department head/area supervisor assisted by the Inventory Control Specialist. Each account holder will be issued a bar code scanner (with complete instructions), printout of inventory and assigned a completion date. The location will be entered into scanner before scanning the bar coded identification number (Z). The account holder will scan all inventory in his/her area. This will ensure that any equipment moved from original department (for whatever reason) is located during physical inventory. The scanner will be given back to Inventory Control Specialist to upload found data to the State Inventory System. A "Not Found" report will be generated and given back to the account holder on any missing equipment not scanned. The account holder will have completed the physical inventory when all missing equipment is located or an incident report is completed (See Security Procedures)
- C. The loss/disappearance of State, Federal, Foundation, and Local equipment will be explained through a State Incident Report prepared by the department head/area supervisor and forwarded to the Inventory Control Specialist. After all information

has been completed, the Inventory Control Specialist will forward to the Executive Vice President for Administrative Services.

- D. Equipment Document Form 2 (Attachment D) will be completed for all state and local equipment transferred from Piedmont Technical College to another institution Equipment Office. This form will also be prepared for State, Federal, Foundation, and local equipment considered lost or stolen. (AIMS) This form will also be logged to insure complete records of all transferred, stolen, lost or unserviceable equipment.

VI. Security Procedures

Department heads and area supervisors will compile quarterly a list of unserviceable and obsolete equipment and submit the list to the Inventory Control Specialist as available.

- A. This equipment will be moved to the warehouse for storage until it can be disposed of. The Inventory Control Specialist will follow-up by submitting the proper paperwork to the State inventory Agent or Foundation representative for approval.
- B. Area supervisors and department heads will secure classrooms and labs.
- C. When it has been determined that property is missing:
 - 1. The account holder or department head will contact Public Safety and Inventory Control Specialist immediately.
 - 2. A completed Incident Report with details will be forwarded to Inventory Control Specialist. This report must include information related to normal departmental security procedures and the time/circumstances of the loss. (Attachment G)
 - 3. Public Safety personnel will conduct an investigation into the incident, and notify the Sheriff's Office.
 - 4. A completed report for State, Federal, and Local equipment, along with Report of Survey/Inventory Adjustment Report (Attachment H) completed by the Inventory Control Specialist will be forwarded to the Executive Vice President for Administrative Services. (AIMS)

<u>Original on File</u>	<u>3/20/06</u>
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PIEDMONT TECHNICAL COLLEGE EQUIPMENT SIGN OUT SHEET

DATE: _____

REQUESTED BY - NAME: _____

COMPANY: _____

APPROVED BY: _____

DATE ITEM(S) TO BE RETURNED: _____

INVENTORY NUMBER - "Z" OR "T" ITEM DESCRIPTION

I UNDERSTAND THAT I SHALL BE HELD LIABLE FOR LOSS OR DAMAGE TO THE ITEM(S) LISTED ABOVE AND SHALL RETURN ON THE DATE SPECIFIED. I FURTHER UNDERSTAND AND AGREE THAT THE ITEM(S) SHALL BE RETURNED IN THE SAME CONDITION IN WHICH IT WAS BORROWED.

RECEIVED BY: _____

WITNESSED BY: _____

TO BE COMPLETED WITH ALL ITEMS ARE RETURNED

DATE

CORRECT NUMBER - YES / NO

ITEMS IN SAME CONDITION AS BORROWED - YES / NO

DATE IN - NO LATE FEE

RETURNED BY

RECEIVED BY

EQUIPMENT/FURNITURE TRANSFER

DATE: _____

INVENTORY #	DESCRIPTION	FROM LOCATION		TO LOCATION	
		BLDG/ROOM	PERSON	BLDG/ROOM	PERSON
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

MOVE PERFORMED BY: _____

Piedmont Technical College
Employee Termination Clearance Form

Employee Name: _____

Termination Date: _____

Reason for Termination: _____

1. Supervisor's Clearance _____
Course Materials & other Division Clearance
2. Institutional Officer _____
3. Information Services Clearance _____
4. Library Clearance _____
5. Public Safety
/Security Key Clearance _____
6. Equipment Clearance
/Prop/Inventory Control _____
7. Payroll Clearance _____
8. Staff & Program Development _____
9. Human Resource Office
Exit Processing _____
10. Web Site/Campus Pipeline _____
11. Employee Signature _____

****ALL OF THE ABOVE STEPS REQUIRE YOUR PERSONAL VISITATION****

STATE BOARD FOR TECHNICAL AND COMPREHENSIVE EDUCATION
EQUIPMENT DOCUMENT

DATE _____

State ID Number	Commodity Code	Location To Dept. From			Description	
Serial Number	Vendor	Date Paid Month Fiscal Year		Purchase Ord.	Fund	Acquisition Cost
Cond. Dep. Fiscal Year	State Cost	Remarks	Add	Change	Delete	Transfer

RECEIVED FROM _____
RELEASING CUSTODIAN OR VENDORACCEPTED BY _____
CARRIERACCEPTED BY _____
NEW CUSTODIANWhile Copy: Inventory Control
Remaining copies to Receiving Institution

FORM NO. 2 (REVISED 1987)

**SOUTH CAROLINA TECHNICAL COLLEGE SYSTEM
PURCHASE ORDER RECONCILIATION INVOICE RECAP**

TECHNICAL COLLEGE #:	_____	FUND CODE:	_____
PURCHASE ORDER#:	_____	AMENDED FUND CODE:	_____
VENDOR #:	_____	SPLIT FUND CODE:	_____
INVOICE #:	_____	COMMODITY CODE:	_____
VOUCHER/CHECK #:	_____	DATE SIGNED AS REC'D:	_____

1. TOTAL ORIGINAL PURCHASE ORDER	
2. Adjustments (not included in original Purchase Order)	
A. Discounts/Freight/Other (Describe)	
B. Sales Tax/Use Tax	
3. ADJUSTED P.O. (TOTAL PURCHASE ORDER PAYMENT)	

[illegible]

TOTALS (Include Attachments If Applicable)

GRAND TOTAL \$

DATE: _____ SIGNATURE: _____

STATE INVENTORY CONTROL FORM NO. 3
(REV. 08/01)

**Piedmont Technical College
Department of Public Safety
Information/Incident Sheet**

Incident #:		Incident Type:		Location:	
Report Date & Time:					
Incident Date & Time:					
Complainant's Name:					
DOB:					
Age					
Address: 620 N Emerald Rd					
Phone					
City: Greenwood	State: SC	Zip: 29648	SS#		
Race	Sex:	Ht	Wgt:	Hair:	Eyes
Victim # 1 Name: Piedmont Technical College					
DOB:					
Age					
Address: 620 N Emerald Rd					
Phone					
City: Greenwood	State: SC	Zip: 29648	SS#		
Race	Sex:	Ht	Wgt:	Hair:	Eyes
Subject #1 Name: Unknown					
DOB:					
Age					
Address:					
Phone					
City:	State:	Zip:	SS#		
Race	Sex:	Ht	Wgt:	Hair:	Eyes
NARRATIVE					
Reporting Officer					
James L. Fowler					

REPORT OF SURVEY/INVENTORY ADJUSTMENT REPORT

Address of Technical College

Page _____ of _____

Date _____

Report Number _____

SECTION I.

The following equipment is:

_____ (A) Traded _____ (B) Sold _____ (C) Stolen
 _____ (H) Transfer to another State Agency _____ (I) Trashed/Disposed _____ (Y) Operational Loss
 _____ (F) Return to Vendor _____ (N) Cannibalized _____ (Z) Drop from records

SECTION II.

State ID Number	Description of Equipment	Serial Number	Date Purchased	Fund Code	Cost

USE ADDITIONAL ATTACHMENTS IF NECESSARY.

Total: _____

SECTION III.

Enter a complete statement of facts concerning this matter:

Signature of Department Head

Department

Date of Incident

The College will report all missing equipment as stolen and attach a copy of the Police Report. The College will give a statement of conditions leading to this report and corrective actions taken:

Signature of Equipment Coordinator

Date

I have reviewed the items in this report and I am satisfied that the statements are true and complete:

Signature of President

Date

Review Board Action approved:

Replace with State Funds: _____

Replace with Local Funds: _____

Remove from Inventory: _____

Board Members Signature:

Chairman: _____

Member: _____

Member: _____

Signature of State Equipment Manager

Action/ Completion Date

