

# PRE-INVENTORY CHECKLIST

DEPT: \_\_\_\_\_

DPA: \_\_\_\_\_ **PHYSICAL INVENTORY DATE:** \_\_\_\_\_

In order to make the physical inventory a more efficient process for you, your department, and the inventory office, we suggest that you follow the instructions on this form. The sooner you begin working on these tasks the more prepared you will be for the physical inventory and the less time the actual physical inventory will take.

## *Tasks to begin 60 days prior to the physical inventory:*

- Familiarize yourself with the locations of all your department's assets. These locations can include: offices, administrative areas, labs, storage areas, closets, off-campus sites, etc.).
- Update your *Off-Campus Authorization* forms file by identifying any equipment in your department that is currently being used off-campus (i.e. a professor may have a computer at home to do research) and obtaining a copy of the *Off-Campus Authorization* form. Forms need to have been updated within the last 12 months. This will save a tremendous amount of time for the physical inventory. This list should be available the first day of the physical inventory.
- Update your records of all equipment that may be untaggable. Untaggable items include equipment too small to place a tag or equipment used outside where tags will wear off because of weather. This list should be available the first day off the physical inventory.
- Identify areas in your department that will need special arrangements prior to the physical inventory. These areas include hazardous areas, radiation zones, confined spaces, lab areas, clean rooms, etc. Be prepared to discuss these areas at the pre-inventory meeting.
- For equipment that has been approved and marked for disposal, arrange for equipment to be picked up by Surplus Sales prior to the physical inventory.
- Identify and update your list of equipment items that are in storage. Be prepared to discuss these items during the pre-inventory meeting.
- It is strongly recommended that you, the DPA, escort inventory personnel during the physical inventory. If you will not be able to escort inventory personnel, make arrangements for someone who is familiar with the department, the equipment, and its locations to be the escort. The escort should be able to access all rooms and secure locations in the department. (NOTE: It is preferable that a representative from the

department be with us at all times during the inventory to substantiate the inventory and to be a point of contact for staff members in your department if questions concerning the inventory should arise).

***Task to perform immediately following the pre-inventory meeting between the DPA and Equipment Manager (this meeting is usually held 3-4 weeks prior to the physical inventory):***

- Review department inventory listing to familiarize yourself (or have the escort review the list) with the department's asset's locations. (Knowing where equipment is prior to the inventory will tremendously reduce the time required to look for equipment).
  
- Advise departmental staff of pending physical inventory schedule, including the dates and approximate time of the physical inventory. It is recommended that you announce the inventory schedule during a staff meeting, post a notice, and send out an email to all staff members.

***Tasks to be completed in the week prior to your physical inventory:***

- Notify all faculty and staff members of the planned inventory dates.
  
- Advise faculty and staff to label all personal items (i.e. personal laptop bags, etc.) to avoid the possibility of having those equipment items tagged with a University tag.
  
- Confirm the inventory schedule with escorts who will be accompanying inventory personnel through their individual areas in your department. Make sure escort has access to all locations, including keys, card-keys, door codes, etc.
  
- Post notices in all areas (preferably post notice on all doors in department) scheduled for the imminent inventory.

***Other Items to Remember***

- Computer users, lab workers, machine operators, or anyone using tagged equipment at the time of the physical inventory may expect to be interrupted briefly as the equipment is scanned. Please post notices in these areas as well.
  
- Assets may need to be lifted, turned, or removed from shelves, drawers, etc. to access the bar-code tag.

***If you have any questions, comments, clarifications, or suggestions please call:***

***Lee Alder, Equipment Manager, 797-1999***