

# Equipment Management

New policy regarding the purchase, property tags, moving and inventory of equipment is effective immediately. In order to streamline the inventory process, we must be consistent in how we code our inventory, how we track it and how we process it for disposal or relocation.

- Please complete all fields of the equipment management portion of the on-line purchase order (REX) system. The equipment management fields **MUST** be completed with building number, room number, and user ID. The user ID, effective immediately, is the faculty member's initials in first name, last name order. Please do not use any other coding system as that makes the inventory very hard to read. All departmental purchases should be coded "00". I've attached a list of the appropriate codes to be used when coding equipment purchases. Please make a note of these codes.
- Please use the appropriate custody code for equipment purchases in REX. All equipment purchased on a grant must be coded 5772-00 (00 can be the fund number when the system is set up correctly). All equipment purchased on the department must be coded 5759-00 (00 can be 19900). This sorts our inventory into a format easier to track.
- All equipment must be coded for the appropriate user. If you are purchasing equipment for a faculty member, first you must determine if the equipment is going in their office or their lab and put the correct information into REX. If the equipment is purchased on 19900 funds, then put the appropriate administrative office number and enter "00" for the user code. Please remember to use the appropriate building code (551-main Psychology building, 429-Graduate building, 411-Bugental research building, 407-Student lab building) in the building field. All purchases for the Life Sciences Computing Facility must be coded "LS" (building 544 room 2242) and all purchases for the DCF or building 407 must be coded "00" for department (not "LM").
- If equipment is purchased on extra-mural funds, then it must be coded with the PI's user ID, even if there will be another user. Since the PI signs the purchase order, the equipment is assigned to him/her and it must be coded to his/her inventory in order to track it for audit purposes.
- No equipment should be moved without notifying Joe (see the EIMR policy). Please send Joe an email listing the property number, the old location and the new location. This will enable us to update our inventory during the year to ensure accuracy.
- Please see Joe to complete an EIMR for all equipment removed from the building. Please let Joe know if you plan to take equipment home or if a faculty member indicates he/she wants to move equipment to another building or take equipment home. Periodically, we will dispose of equipment that is obsolete or broken. An EIMR must be completed and processed through Central Stores for all cases to ensure accurate tracking.

Please see Lynne or Joe if you have any questions regarding these procedures. Our equipment inventory must be completed on a regular basis to ensure we meet audit requirements and these new policies will help make the process more manageable.