

## Annual Inventory Helpful Tips & Tricks

### THROUGHTOUT THE YEAR

- **Save copies of all your Surplus forms.** If there is a dispute, Property Control must see a signed and dated form that shows the signature of the Surplus person who picked up the asset.
- **If you move it, speak up.** If you move any tagged asset at any time throughout the year, send an email to Cree McNulty with the asset tag number and the new location so we can update the Banner record.

### DURING THE MONTH OF SEPTEMBER

- **Turn on computers/laptops.** To increase the number of automatically found computers/laptops, be sure to turn on computers/laptops.

### DURING INVENTORY

- **Read instructions.** Included with every inventory spreadsheet is an instructions sheet – read it.
- **Allow yourself enough time to locate all your assets.** Don't wait to start the project! Inventory is distributed to custodians via an automated email from Banner on October 1, 2024.
  - Know when staff and/or faculty are away from the college and verify their computer asset tags before they leave for the Thanksgiving break. Do not try to find everything between Thanksgiving and Christmas.
- **Sort the list.** Before you start looking, sort your inventory list by location rather than by asset tag number. Call Cree if you don't understand a room or building code.
- **Did you have the asset on October 1st?**
  - If yes, mark it "F" for found. Verify the asset has the correct location and serial number.
    - If an asset was sent to Surplus AFTER October 1st, mark it **found** because you had it on October 3<sup>rd</sup>.
    - If an asset was sent to Surplus BEFORE October 1st, mark it as **surplus** and attach a copy of the signed and dated surplus form to your inventory packet.
- **If it's lost, it's lost.** It happens – we have a process for this, don't stress or delay submitting your inventory because of a lost or stolen asset. If you have any concerns, please call Cree for assistance.
- **Don't submit a book.** If you are attaching a lot of documentation – STOP – give Cree a call.
- **Ask for help.** Do this **BEFORE** you spend too much time trying to resolve an issue. Most issues we receive are resolved in a 3-minute phone call.

If you have any questions or additional tips, please contact Cree (x4010) in Property Control.