

## INVENTORY EQUIPMENT PRE-INVENTORY CHECKLIST

To make the annual physical inventory a more efficient process for you and your department we suggest that you follow the tips on this checklist. The sooner you begin working on these tasks, the more prepared you will be for the annual inventory and the less time the actual physical inventory will take.

### Tasks to begin 60 days prior to the annual inventory:

- ☐ Familiarize yourself with your department's inventoried equipment. Review your inventory list to get an understanding of what types of equipment are in your department and their locations.
- ☐ For equipment that has been needs to be sent to Surplus, arrange for equipment to be picked up by Surplus prior to the physical inventory. **Keep copies of the PAPER PICK-UP FORM signed by Surplus when they remove your equipment.** This pick-up form is not available digitally, it is not in Etrieve, you need to keep the PAPER FORM left by Surplus.
- ☐ Identify and update your list of equipment items that are off-campus. Be prepared to account for these items during the scheduled physical inventory. It is strongly recommended that you notify all staff with off-campus equipment of the upcoming annual physical inventory.
- ☐ Identify areas in your department that will need special arrangements prior to the physical inventory. Make arrangements with an escort (lab aide, coordinator, etc.) who is familiar with the department and their work area (lab, office, site, etc), the equipment, and its location. The escort should be able to access all rooms and secure locations in their area.

### Task to perform 3-4 weeks prior to the annual inventory:

- ☐ Review department inventory listing to familiarize yourself with the department's equipment 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, or send out an email to all staff members.

### Tasks to be completed in the week prior to the annual inventory:

- ☐ Notify all faculty and staff members of your upcoming inventory dates.
- ☐ Confirm the inventory schedule with escorts who might be accompanying inventory personnel through their individual areas in your department.

*If you have questions, please contact Cree McNulty, Property Control Manager.*