2021 - 2022

GREGORY-PORTLAND
INDEPENDENT SCHOOL DISTRICT

Inventory Handbook

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Introduction

It is imperative that all Gregory-Portland ISD employees are aware of the inventory control system and comply with the procedures outlined. By using the appropriate systems and communication methods from acquisition to disposal, staff will have a record of assets for which the district is responsible as described in this document.

The implementation of an effective and efficient process for recording, inventorying, maintaining and disposing assets owned by the Gregory-Portland ISD is necessary for several reasons:

- To minimize the risk of loss, theft and damage and maintain accountability of assets through internal controls.
- To comply with federal and state governmental regulations concerning the management, accounting and reporting of assets acquired with grant funds.
- To comply with governmental accounting standards concerning the accounting and reporting of assets.
- To ensure the maintenance and implementation of adequate controls to account for the procurement, location, custody, and security of equipment purchased with District and Grant funds
- To present a uniform method of maintaining fixed and capital asset records for the Gregory-Portland Independent School District.

Each campus and department administrator are responsible for ensuring the employees under their supervision follow the procedures outlined for acquiring, recording, inventorying, maintaining, and disposing of district assets.

Inventory personnel and school principals are responsible for tracking, monitoring, and safeguarding all inventories within the district. Tracking of all inventories will increase accountability and avoid potential loss, replacement, and displacement.

Stewardship Responsibility
Department and Campus Leadership are accountable for stewardship responsibilities of all inventory assets under their control. This "good stewardship" responsibility includes, but is not limited to:

- Basic safeguarding and physical security;
- Complying with district, state, and federal record-keeping;
- Maintaining assets in good working condition;
- Using assets safely and properly.

Policy

Inventory maintenance is to comply with government auditing standards to avoid penalties and reduction in state funding.

- Inventory is not to be altered, removed, or destroyed without appropriate District Office approval.
- Inventory is not to be loaned or rented without appropriate District Office approval.
- Inventory purchased with categorical funds for special programs is not to be transferred outside the program area without District Department approval.
- A complete inventory of all classrooms and offices is to be done at the beginning and end of each school year to verify inventory accuracy. This is to include all fixed assets, critical control assets, textbooks, etc.
- Board of Education (BOE) property can only be used for BOE business. If BOE property is requested to be removed from BOE facilities to pursue job-related activities at other locations, a Request for Off-Campus Use of Equipment Form must be approved by the school principal or facility supervisor. Equipment to be authorized for off-campus use includes audio-visual equipment, laptop computers, or other equipment that may be required for off–site presentations or training purposes. The original document is to be filed with school inventory records to reconcile year-end school inventory reports. The requester is to keep a copy of this document for accountability purposes.

Asset Inventory Definition

Audited asset classes <u>required</u> to be tracked by Gregory-Portland ISD are recorded and managed in two (2) asset management systems.
All technology equipment assets having a probable useful life of greater than one year, a total purchase price equal to or greater than $500, purchased with grant funds, or falling under an asset class listed below must be tracked in the appropriate system(s) listed below.

1. Skyward (Fixed Assets)
   - ❖ Object **Code 6639 (**capital technology) will be utilized for Capital assets over $5000.
     - ❖ Capital Asset Categories:
       - o Capitalized Equipment
       - o Capitalized Technology Equipment
       - o Capitalized Software **(6397)**
   - ❖ Will record and track Capital assets with a purchase value $5000 and above to include all donated technology equipment.
   - ❖ Campuses and Departments are responsible for any equipment moved within and outside of campus in the Inventory program.

- ❖ Object **Code 6396** (fixed technology) will be utilized for assets between $500 - $4,999.
- ❖ Will record and track fixed assets with a purchase value between $500 - $4,999 and a copy of the asset record will be inserted into Skyward.
- ❖ Will be the system of record for all Capital and Fixed assets with a purchase price of $500 and above to include all donated technology equipment.
- ❖ Fixed asset types tracked in Skyward include but are not limited to:
  - ❖ Security equipment (camera systems)
  - ❖ Technology Equipment Categories (may include but are not limited to):
    - o AV/communications equipment
    - o Computers (desktops, laptops, tablets/iPads)
    - o Printers (laser printers, 3D printers)
    - o Copiers
    - o LCD projectors
    - o Interactive Tv's
    - o Interactive whiteboards
    - o Flat screen TV's
    - o Mobile charging carts
    - o Network equipment (servers, routers, switches, wireless access points)
    - o Uninterruptable Power Supplies (batteries)

2. Incident IQ Asset Inventory System
- ❖ Object **Code 6399** (non-fixed assets) will be utilized for technology assets less than $500.
- ❖ Technology and non-technology asset types under $500 will be tracked in Incident IQ and may include but are not limited to:
  - ❖ Technology Equipment:
    - o Laptops
    - o Desktops
    - o Chromebooks
    - o Software (Adobe, Google Chrome, etc.)
    - o Charging Carts (Vivacity, Black Box, etc.)

- ❖ Object **Code 6399** (non-fixed assets) will be utilized for supplies not tracked in any system.
  - ❖ **Unaudited asset classes not tracked in Incident IQ include:**
    - o Keyboards and wireless keyboards
    - o Headphones
    - o External hard drives
    - o Mice
    - o Monitors
    - o Other peripheral accessories
    - o Protective cases

- ❖ **Additionally, we may consider tracking the following unaudited classes of non-fixed assets listed below in the future:**
  - ○ Document cameras
  - ○ Flat screen TV's
  - ○ LCD projectors
  - ○ Printers (laser printers, inkjet printers, 3D printers)
  - ○ Scanners

Roles and Responsibilities

Technology Department & Technician

- ❖ Must prepare inventory reports to support the accurate accounting of assets.
- ❖ Responsible for recording and maintaining accurate asset records in Incident IQ.
- ❖ Will affix replacement inventory tags on assets immediately upon identification of need and make appropriate changes in Incident IQ.
- ❖ Will approve the final disposition of all surplus assets and coordinate with vendor, and update Incident IQ.
- ❖ Will communicate policy and procedure changes and address all unique circumstances that have not been previously defined.
- ❖ Will maintain the Incident IQ, reviewing for accurate postings of asset transactions.
- ❖ Will provide inventory tags when requested.
- ❖ Will provide standard and guidance on technology purchases.

Maintenance Warehouse

- ❖ Responsible for receiving newly purchased inventory equipment.
- ❖ Will deliver newly purchased inventory equipment to campuses/departments.
- ❖ Will verify physical receipt/packing slip of inventory.

Maintenance Logistics

- ❖ Will deliver and pickup inventory to/from buildings.
- ❖ Will coordinate and physically move technology assets at the campus level for disposal or repair.

Principal or Department Designee

- ❖ Must report missing or stolen technology equipment to the Technology Department within 24 hours of discovery.
- ❖ Must report missing or stolen fixed assets to Fixed Asset Office within 24 hours of discovery.
- ❖ Will assign assets to and collect assets from staff.
- ❖ Will adhere to the Gregory-Portland ISD purchasing and financial guidelines.
- ❖ Will coordinate and physically move technology assets at the campus level for disposal.
- ❖ Will request inventory tags for assets immediately upon identification of need.
- ❖ Will review and update inventory records to support Asset Transfer and Asset Disposal.
- ❖ Will sign off on inventory transfer and disposition from their campus.
- ❖ Will make appropriate changes in Incident IQ.
- ❖ Will furnish a list of all inventories that have been damaged, broken, or have no useful life to district personnel for inventory control. They will then be reviewed and disposed of accordingly. Once there is documentation with the appropriate signatures verifying that equipment has been sold, donated, missing, stolen or otherwise no longer in the system, it may be deleted from the system via the Property Disposition Form that can be found in the GPISD homepage.

Other Department Designee

- ❖ Will affix asset tags to inventory items.
- ❖ Will affix replacement inventory tags on assets immediately upon identification of need.
- ❖ Will adhere to the Gregory-Portland ISD purchasing and financial guidelines.
- ❖ Will make appropriate changes in Incident IQ.
- ❖ Will update asset records within Incident IQ (i.e., changes to the asset assignment (room or staff), changes to the asset location (campus), changes to the asset status (lost, stolen, dispositioned, etc.).

Fixed Assets

- ❖ Record cost for fixed and capital assets in Incident IQ and those disposed
- ❖ Responsible for maintaining accurate fixed asset records of donated, retired assets in Incident IQ.
- ❖ Will prepare an annual fixed asset inventory spreadsheet and prepare inventory reports to support the accurate accounting of assets.
- ❖ Will communicate policy and procedure changes and address all unique circumstances that have not been previously defined.
- ❖ Will provide inventory tags.
- ❖ Will provide standard and guidance on fixed asset purchases.
- ❖ Will update asset records fixed asset transfers to the physical location of assets in Incident IQ.
- ❖ Will recommend fixed assets that should be disposed of at years end.
- ❖ Will review and update inventory records to support asset acquisition and asset disposal.

Secretary to the Director of Technology

- ❖ Will generate and submit requisitions for technology and asset inventory purchases.
- ❖ Will verify physical delivery of assets to the campus/department.
- ❖ Will adhere to the Gregory-Portland ISD purchasing and financial guidelines.
- ❖ Will coordinate with Maintenance/vendor to physically move technology assets at the campus level for disposal or repair.

Grant Administrator

- ❖ Will approve or deny asset transfer or disposal for restricted grant funded assets.

HR

- ❖ Will communicate with campus designee/department/manager when a new employee is hired.
- ❖ Will communicate with campus designee/department/manager when an employee transfers or separates the district.

Purchasing Department/Finance Department

- ❖ Will approve all purchase orders for all inventory purchases.
- ❖ Will provide purchase orders with designated object codes to Inventory Specialist.
- ❖ Will provide purchasing data to the Fixed Assets and Technology Departments.
- ❖ Will review purchase orders for correct account and budget codes.

Vendor

- ❖ Will physically remove asset from district facilities for recycling of assets.
- ❖ Will provide a list of assets (including tag and serial) disposed/recycled from the district.

All Employees

- ❖ Will ensure assets are always accessible for audit purposes.
- ❖ Will ensure assets are in good working condition or maintenance needs are met.
- ❖ Will ensure classrooms, computer labs, and offices are locked, to secure devices when equipment is not supervised.
- ❖ Will ensure that all assets are used for approved purposes and not for personal gain.
- ❖ Will exercise "reasonable care" for asset safekeeping.

❖ Will notify the computer lab aide or Inventory/Fixed Assets Specialist to update Incident IQ for campus and room location change of equipment, if necessary.
❖ Will notify the computer lab aide to update Incident IQ for proper removal of equipment.
❖ Will report missing or stolen property to principal/Technology Department head within 24 hours of discovery.

Teachers

❖ Will ensure equipment is accessible during audits.
❖ Will ensure equipment is in good working condition or equipment maintenance needs are met.
❖ Will exercise "reasonable care" for equipment safekeeping.
❖ Will notify their Principal Designee/Campus Secretary if they are transferring campuses, leaving the district, or storing device for the summer, to receive instructions on device collection.
❖ Will report missing or stolen property to Technology Department within 24 hours.
❖ Will ensure equipment will not be exchanged or given to other faculty/staff without prior approval by Principal and/or Technology Director.

Students

❖ Will ensure equipment is always accessible for audit purposes.
❖ Will ensure equipment is in good working condition or equipment maintenance needs are met.
❖ Will exercise "reasonable care" for equipment safekeeping.
❖ Will notify their school leadership if they are transferring campuses or leaving the district to receive instructions on device collection.
❖ Will report missing or stolen property to school leadership within 24 hours.
❖ Will be responsible for any technology equipment they damaged in the classroom and will be charged unless it is accidental.
❖ Will ensure equipment will not be exchanged or given to other students.

Procedures for Inventory Asset Oversight

Acquisition of New Assets

The Technology Department is responsible for additions to newly purchased assets and tracking all fixed and capital assets and has oversight of all technology assets. The Technology Department is responsible for advising GPISD personnel on technology purchases that meet district guidelines and provides preapproved technology equipment on the district website. The Campus Principal and Department Head are responsible for all assets within their sites and shall follow GPISD purchasing and financial guidelines for technology, non-technology, capital, and fixed asset equipment.

The Technology Department team research, evaluates, completes bid processes, distributes, and collects information for technology equipment refresh cycles.

The following object codes should only be used when purchasing assets:

- ❖ **Trackable:**
- ❖ Object **Code 6639** (capital technology) assets over $5000.
- ❖ Object **Code 6396** (fixed technology) assets between $500 - $4,999.
- ❖ Object **Code 6395** (non-fixed technology) assets below $5000.

- ❖ **Non-Trackable:**
- ❖ Object **Code 6399** (supplies) assets below $500.

#	Step	Responsibility
1	Secretary to the Director of Technology enters requisitions for equipment in Skyward using approved object codes and approved vendors. Include installation site and the "ship to" location as "Technology Department." **Note**: Unless authorized by the Purchasing Department or Technology Director all assets should be shipped to the Maintenance Warehouse, except for technology equipment (i.e., desktops, Chromebooks, Interactive TVs) should be shipped to the Technology Department.	Secretary to the Director of Technology
2	The requisition follows workflow approval through Skyward for approval for any grant funds used, and Grant Administrator provides approval.	Grant Administrator
3	The requisition follows workflow approval through Skyward for approval for any funds used, and Budget Administrator provides approval.	Budget Administrator
4	The Technology Director will review the requisition to ensure the products meet the technology standards and will notify the requestor if substitutions are necessary.	Technology Director
5	The requisition follows workflow approval through Skyward. Finance/Purchasing identifies if products requested meet the financial standards and correct account codes have been used and will notify the requestor if corrections are necessary. Finance Budget Bookkeeper - approves all other accounts including Technology (6396). Purchasing Fixed Asset Specialist - approves all fixed asset accounts including Technology (6396). In some cases, this person may approve both codes residing in the same purchase order.	Finance/ Purchasing

6	The requisitions approval process through Skyward to create a Purchase Order. **Workflow:** 1. Initial requisition approval is the Fixed Asset Specialist to determine if the item is a fixed asset. 2. The requisition then goes to the Technology Director for approval. 3. Next, the Purchasing Clerk determines if the asset is in its correct object code and vendors are in the coop. 4. The Finance Director will review to make sure the correct account code is being used. 5. If the requisition is using a grant budget, the next approval goes to the person who approves for the grant. 6. Then the requisition goes back to the buyer for review. 7. Lastly, it gets turned into a purchase order automatically in Skyward and faxed to the vendor. A copy is sent to the Fixed Assets/Inventory Specialist and Technology Secretary.	Purchasing
7	Follow the steps documented in the Procedure for Receive New Technology The requisitions approval process through Skyward to create a Purchase Order. Inventory- Maintenance Warehouse Delivered, or Receive New Technology Inventory- Campus Delivered, or Receive New Technology Inventory- Vendor Installed	

Receive New Technology Inventory- Maintenance Warehouse Delivered

Purpose: This procedure establishes a uniform process for trackable technology inventory and computing equipment into GPISD Maintenance Warehouse and transfers inventory to the campus/department.

❖ Most assets should be received through the warehouse; however, equipment included in vendor deployment contracts or large/bulky equipment (e.g., copiers, printers) may be dropped shipped directly to the campus or technology department.

#	Step	Responsibility
1	Maintenance Warehouse verifies receipt of inventory purchases by Packing Slip, verifying quantity count and number of boxes received.	Maintenance
2	If needed, Maintenance notifies the Technology Department that assets have been received and then physically moves the equipment to the Technology Department and writes the PO number and campus/location on the inventory boxes.	Maintenance
3	If needed, Technology Department images and provisions equipment for deployment.	Technology Department
4	**Received directly to Campus/Department Building:** Maintenance prints (2) copies of the Purchasing Ticket and gives them to the Maintenance Driver before delivery to leave with the campus/department.	Maintenance
5	Maintenance/Vendor physically delivers the inventory to the Technology Department building and leaves a copy of the Packing Slip and obtains a signature on the other copy as a record of delivery.	Maintenance/ Vendor

Receive New Technology Inventory – Campus Delivered

Purpose: The purpose of this procedure is to establish a uniform process for receiving technology assets ordered by the campus/department and directly shipped to the campus/department.

Receipt & Delivery of Equipment:

❖ Direct Shipments: Schools or facilities to which equipment must be delivered directly from the carrier to the facility (e.g., office furniture, etc.) shall notify the Fixed Assets/Inventory Specialist of the arrival of the equipment to schedule a time for inventory and tagging of the equipment. It is the facility administrator's responsibility to notify the Fixed Assets/Inventory Specialist and submit a New Property Form to the Fixed Assets/Inventory Specialist which can be found on the GPISD homepage.

Receipt & Delivery of Shipments: The equipment is to be placed in the designated room for inventory records. This information will be included on the next inventory listing provided for the administrator in charge or end of year inventory.

❖ Inspection: All equipment items will be visually inspected upon delivery except for equipment requiring installation by a company representative. Visual exterior damage will be noted on the shipper's delivery ticket, and the Inventory copies of the purchase order. Concealed damage will be noted on the same copy of the purchase order.

❖ Partial Shipments: When partial shipments of purchase orders are received items shall be placed on hold until back orders have been received. Any requests from the purchaser for delivery of partially shipped items must be documented on the inventory copy of the purchase order as a partial delivery.

#	Step	Responsibility
1	When non-fixed assets are received at the campus/department, Technology Designee/ Admin Assistant/Principal-Department Designee verifies receipt of inventory purchases by Packing Slip and Purchase Order for the number of boxes and assets received, and receives in Skyward, and Accounts Payable releases payment to the vendor. **Note:** If items are missing or damaged, campus/department will initiate the warranty claim process with the respective vendor.	Admin Assistant/ Principal-Department Designee
2	An automated process will run that will create the Purchase Order (PO) shell details in the asset inventory system after it has been received into Skyward. ❖ Purchase Order (PO) Shell must include at a minimum: Purchase Order Number, Vendor and Purchase Date. ❖ Additional purchasing details include: Product Description, Model, Manufacturer, Funding Source, Account Code(s), Price, and Total Quantity.	Automated Process
3	If needed, Technology Department or Fixed Assets/Inventory Specialist schedules a time with the campus/department to physically tag the assets.	Technology Department/ Fixed Assets/Inventory Specialist

#	Step	Responsibility
4	Technology Department or Other Department Designee follows the steps documented in the Procedure Label Inventory with Asset Tags to properly affix an Asset Tag (i.e., barcode) to the inventory.	Technology Department/ Other Department Designee
5	Technology Department or Other Department Designee records/scans asset details in Incident IQ upon receiving in Skyward. The list of inventory details will include at a minimum: ❖ Location (Campus/Department), Room, Status ("Available"), Asset Tag, and Serial Number. ❖ Custom Fields "Warranty End Date," "Owner," "Last Inventory Date."	Technology Department/ Other Department Designee
6	If required, Principal/Department Designee/Technician relocates in the asset inventory system, Incident IQ, and performs a change of room, enters the new room number where inventory is relocating to and scans/enters the Asset Tag. If assets are assigned to a person, the Technician/Technology Department follows the steps in the procedures to Assign or Collect Technology Inventory - Staff.	Principal Department Designee/ Technology Department Technician

Receive New Technology Inventory – Vendor Installed

Purpose: Create a consistent method for vendors to follow procedures for requesting asset tags and recording technology asset details for vendor installed equipment at the campus level.

#	Step	Responsibility
1	If needed, Vendor identifies equipment that requires asset tags and emails a request for Asset Tags to the Technology Department and includes: ❖ Vendor Name, Vendor ID, Number of Tags needed, and Purchase Order(s).	Vendor
2	Technology Department provides Asset Tags to the Vendor within 2 days of receipt of request. **Note: Unless tags must be ordered from the manufacturer.**	Technology Department

3	Vendor follows the steps documented in the Procedure to Label Inventory with Asset Tags to properly affix an asset barcode label to the inventory.	Vendor
4	Vendor emails the Technology Department a formatted spreadsheet within 2 working days of installation/delivery. Vendor provides a spreadsheet of inventory details with the following required fields: ❖ Purchase Order Number, Vendor, Purchase Date, Product Description, Model, Manufacture, Site ID, Room, Serial Number, and Asset Tag.	Vendor

Label Inventory with Asset Tags

Purpose: The purpose of this procedure is to document how to request asset tags and proper placement of asset tag on assets.

Asset Tagging is the main process for identifying and managing assets and is a critical requirement for all inventory tracked in the asset inventory system, Incident IQ. A numbered bar code tag identifies items recorded in the equipment inventory database. The primary purpose of tagging is to provide an accurate method of identifying assets as district property, control the location of all physical assets, and provide a link to asset records for physical inventories. A district asset bar code label is assigned and affixed to the items upon receipt.
Inventory and assignment processes become more consistent and standardized with an Asset Tag.

All non-capital, fixed, and moveable technology assets classified for inventory and maintained in the asset inventory system, Incident IQ, shall each be affixed with a GPISD Asset Tag **except** in the following cases:
- Unaudited asset classes not tracked in Incident IQ listed in Asset Inventory Definition.
- Internal components and sub-components to internal components.
- Software licenses.
- Insufficient surface area or unusual contour of surface that do not allow for permanent adhesion
- Subject to harsh environmental conditions (i.e., asset tag cannot reliably remain affixed to the items throughout asset lifecycle).

Tag Placement:
Standard tag placement on assets is critical for a strong implementation and seamless auditing procedures. The tag should be placed on an asset where it can be read and scanned without interrupting users that are using the asset or needing to move or transport the asset. In addition, standard placement should:
- Not impact/impede operation of the asset.

- Be visible or easily accessible to district employees.
- Provide visibility of the largest portion of the tag for scanning/auditing purposes.
- Not to be affixed to a removable panel/case (e.g., projector cap, tablet case).

Best practices for labeling technology equipment:
- Tablets/iPads – back of device, center
- Laptops – back of device, center
- Desktops – side panel perpendicular to manufacturer tag
- Projectors (mounted on ceiling) – floor-facing, lower right
- Projectors (not mounted) – top face, lower right
- Interactive whiteboards – top right front face
- Mobile technology cart – right face, upper-left
- Interactive TV – back of device on tiny, center

Asset Records:

Asset records shall be created for all newly acquired inventory items. An inventory database will be created and maintained to include the following information:

- Asset Tag Number
- Asset Type
- Description of the Item
- Location (building and room number)
- Serial Number
- Make
- Model
- Funding Source
- Purchase Price
- Purchase Date
- PO (Purchase Order) Number
- Current Status
- Disposition
- Disposition Date
- Invoice Number
- Warranty End Date

Asset Tag Type:

Asset Tags will be utilized by GPISD to help identify assets that are fixed, non-fixed, and were purchased with Federal Funds.
- Fixed Assets: RFID (radio frequency identification)- **Black and White**

#	Step	Responsibility
1	**Tagging Assets:** Affix the Asset Tag on the portion of an asset that will be most visible and accessible for scanning during physical inventory auditing. Care should be taken to ensure the label does not impede the primary function of the asset.	Technology Department/ Vendor
2	Affix the Asset Tag in the same general spot-on similar product types (e.g., laptops). Place Asset Tag on a smooth flat surface, and not on a removable panel or protective case.	Technology Department/ Vendor
3	**Updating Replacement Asset Tag Information:** When replacing labels, the Technology Department performs a search by ASSET TAG/SERIAL NUMBER in the asset inventory system, Incident IQ, and edit the tag to record a new Asset Tag number to the device. **Note:** Copy the old tag number and the date the tag was changed into the Asset Notes.	Technology Department

Assign or Collect Technology Inventory –Staff

Purpose: This procedure is to document a uniform method for recording assignment and return of assets to staff. Mobile devices should be assigned to staff in the asset inventory system, Incident IQ. All other technology inventory will be assigned to the classroom or office or assigned to the library and checked out through Incident IQ.

- All staff will be assigned devices from Incident IQ.
- Incident IQ is the system of record for all equipment temporarily checked out to teachers and students.
- Incident IQ is the system of record for all equipment assigned to any district staff member.
- Department issued devices must stay with a designated department staff member. Staff transferring to a new department will be assigned equipment from that department.
- Campus issued devices must stay with a campus designated staff member. Staff transferring to a new campus will be assigned equipment from that campus.
- Campus Secretary/Computer Lab Aides must fill out a Transfer Request Form when reassigning devices to new faculty/staff.
- Staff are permitted to take devices home as defined in CMB (Regulation).
- All assigned devices come with a power supply.

- All staff separating from the district **are required** to return all assigned assets.

#	Step	Responsibility
1	**Assign Devices:** All Staff issued devices are recorded by Fixed Assets/Inventory Specialist/Computer Lab Aide in the asset inventory system, Incident IQ, by selecting Users Explorer on the Left Navigation Tools Menu, enter the Staff Name and select > Click Assign Device > and scan the GPISD Asset Tag of the device > Press Enter	Fixed Assets/Inventory Specialist/Computer Lab Aide
2	**Collect Devices:** The Human Resources (HR) Department generates a list of staff transferring or separating from the district and communicates a message to the Principal/Department Head/Manager and Technology Department to assist with the collection process.	HR
3	Staff transferring campuses/departments or separating from the district will notify their Principal/Department Head to receive directions on the collection/transfer process. A transfer request form must be submitted to the Fixed Assets/Inventory Specialist to record into Incident IQ.	Staff
4	All Staff collected devices are recorded by Technology Department/Principal/Department Designee in the asset inventory system, Incident IQ, by selecting Users Explorer on the Left Navigation Tools Menu, enter the Staff Name and select > Select the device asset tag > Click the pencil to change owner > Select Unassign.	Technology Department/Principal Department Designee
5	Computer Lab Aide submits a work order of the asset damage details from the individual staff member, and they will work with the campus/department to take appropriate action they deem necessary.	Technology Department/ Computer Lab Aide
6	Technology Department/Principal/Department Designee physically returns all functioning devices to a secured temporary storage location in the building.	Technology Department/ Principal/ Department Designee

Removal and Disposal of Inventory

Purpose: This procedure is to document a uniform method to record the removal and disposal of fixed and non-fixed technology assets from a campus or administrative building.

The Technology Department aids district staff in all matters relating to the handling of surplus items by establishing a standard procedure for the proper disposal of fixed and non-fixed assets taking into consideration applicable laws and concerns regarding information security, hazardous waste, and special program contractual obligations, etc.

- Equipment/assets must be centralized in one designated area, on the ground floor for ease of pick-up.
- Disposal of technology assets must be approved by the Campus/Department Designee.
- Fixed Assets and Non-Fixed Assets should be disposed of separately.
  - **Non-Fixed Assets**: Dispose through Incident IQ.
  - **Fixed Assets:** Fixed Assets will be disposed in Incident IQ
  - **Disposition Request Form**: After approval from Campus/Department Designee for the disposal of items marked for disposal in Incident IQ, the campus would initiate a work order in Incident IQ for equipment pick up and removal. Campus Designee must fill out a Disposition Request Form that includes a list of asset tag numbers.

Inventory can be disposed one at a time by the technician, or in aggregate by the Department of Technology Services when there are enough assets for a truckload.

- Disposal of technology assets should not be stored in Main Distribution Frame (MDF) and Intermediate Distribution Frame (IDF) closets within the building and is prohibited.
- **Restricted Grant-Funded Assets** – Must be transferred through the regular transfer process, and approval from the Grant Administrator is required. Compliance with funding source recycle, disposal obligations, processing, and documentation requirements are the responsibility of the Grant Administrator.

#	Step	Responsibility
1	Principal Department Designee decides whether to keep device/devices for parts, repair at campus cost or send for disposal, if unrepairable by Technology Department.	Principal/ Department Designee
2	District User creates a work order in Asset Essentials to request pickup of disposal items by Maintenance	District Users
3	If unrepairable or outdated fixed and non-fixed assets are identified for disposal, the Principal/Department Designee/Technician centralizes inventory to a room location in the building (e.g., storage closet, loading dock), and label them for removal, or a technician can begin the disposal process immediately for a technology asset.	Principal/ Department Designee/Technician

4	The Technology Department physically evaluates the disposition of each asset to identify existing warranty status, usability status, and will salvage inventory asset parts where appropriate.	Technology Department
5	**Regular Transfer:** Inventory/Fixed Assets Specialist initiates a campus transfer by selecting the asset tag > select Options > Edit Asset > Change Location > Click Save in the asset inventory system, Incident IQ. A Transfer Request form is attached to inventory files.	Inventory/Fixed Assets Specialist
6	*If assets on transfer are Grant Funded*, assets will require electronic approval by the Grant Administrator assigned to the asset Funding Source. The Grant Administrator will receive an email notification to APPROVE or DENY each asset. **Note**: If the Transfer includes assets from multiple grant funds, the Transfer will not be completed until every tag on the Transfer has been approved by each Grant Fund Administrator.	Grant Administrator
7	Grant Administrator submits appropriate forms to state and federal agencies on recycled/disposed grant funded assets to ensure each asset is documented per reporting requirements.	Grant Administrator
8	Technology Department/Technician coordinates with Maintenance Warehouse for the pickup of fixed and non-fixed technology assets for disposal.	Maintenance Warehouse/ Technology Department/Technician
9	Maintenance Warehouse/Technology Department/Technician physically moves the inventory asset(s) to the Technology Department for final review and disposition. Technology Department/Technician evaluates the disposition of each inventory asset by serial and tag to identify existing warranty status, usability status, and will salvage inventory asset parts where appropriate.	Maintenance Warehouse/ Technology Department/ Technician

10	Technology Department/Technician/Inventory Specialist makes any necessary changes to the asset status in Incident IQ.	Technology Department/Technician/Inventory Specialist
11	If needed, the Technology Department coordinates directly with the appropriate Recycle Vendor for collection of technology inventory for Recycling.	Technology Department
12	The Technology Department verifies the removal of assets in the spreadsheet and performs the ARCHIVE process in Incident IQ to remove the assets from the district accountability.	Technology Department