

UC SAN DIEGO EQUIPMENT MANAGEMENT OVERVIEW

Presented by Equipment Management

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EQUIPMENT MANAGEMENT

General Discussion Points

- Objective – General Information Session
- Definitions
- UCSD Equipment Management Policies
- Purchasing Equipment
- Fabrications
- Transfers vs. Disposals – general procedures, and CAMS processes

UCSD

Equipment Management

We establish and are responsible for procedures related to the management and control of all inventorial equipment under the care and custody of the Regents.

"Equipment" are all items meeting the following criteria, which must be tracked by the University's property and financial systems:

- "Equipment"
 - are non-expendable
 - stand alone
 - have a normal useful life of one year or more (see UCOP's [Useful Life Schedule](#))
 - qualify as tangible personal property with an acquisition cost of \$5,000 or more (includes gifts and transfers of equipment at this value)
 - note, that firearms, government property, and vehicles registered with the DMV must be recorded and tracked, regardless of cost

Equipment Threshold

Effective July 1, 2004, the equipment threshold for capitalized assets was increased from \$1,500 to \$5,000.

- This means that any non-expendable, tangible personal property item purchased for \$5,000 or more, with a useful life of one year or more must be added to the university's physical inventory of personal property.
- This threshold may be superseded by other government, state, or other funding source terms and conditions associated with the funding and university purchase of assets associated with a funded project.

Further, in an effort to exercise appropriate stewardship of departmental assets, departments may employ additional asset tracking requirements for those items under \$5,000 and deemed at risk to loss.

Department Stewardship Responsibility

The head of the custodial department and the Principal Investigator have primary responsibility for the care, maintenance, records, physical inventory, control, and disposition of inventorial equipment. They must maintain up-to-date departmental records and, if a contract is involved, fully inform the Equipment Management Department as to all provisions of each document regarding the care, custody, maintenance, records, control and all transactions involving said property ([BUS-29](#)).

Familiarize yourself with

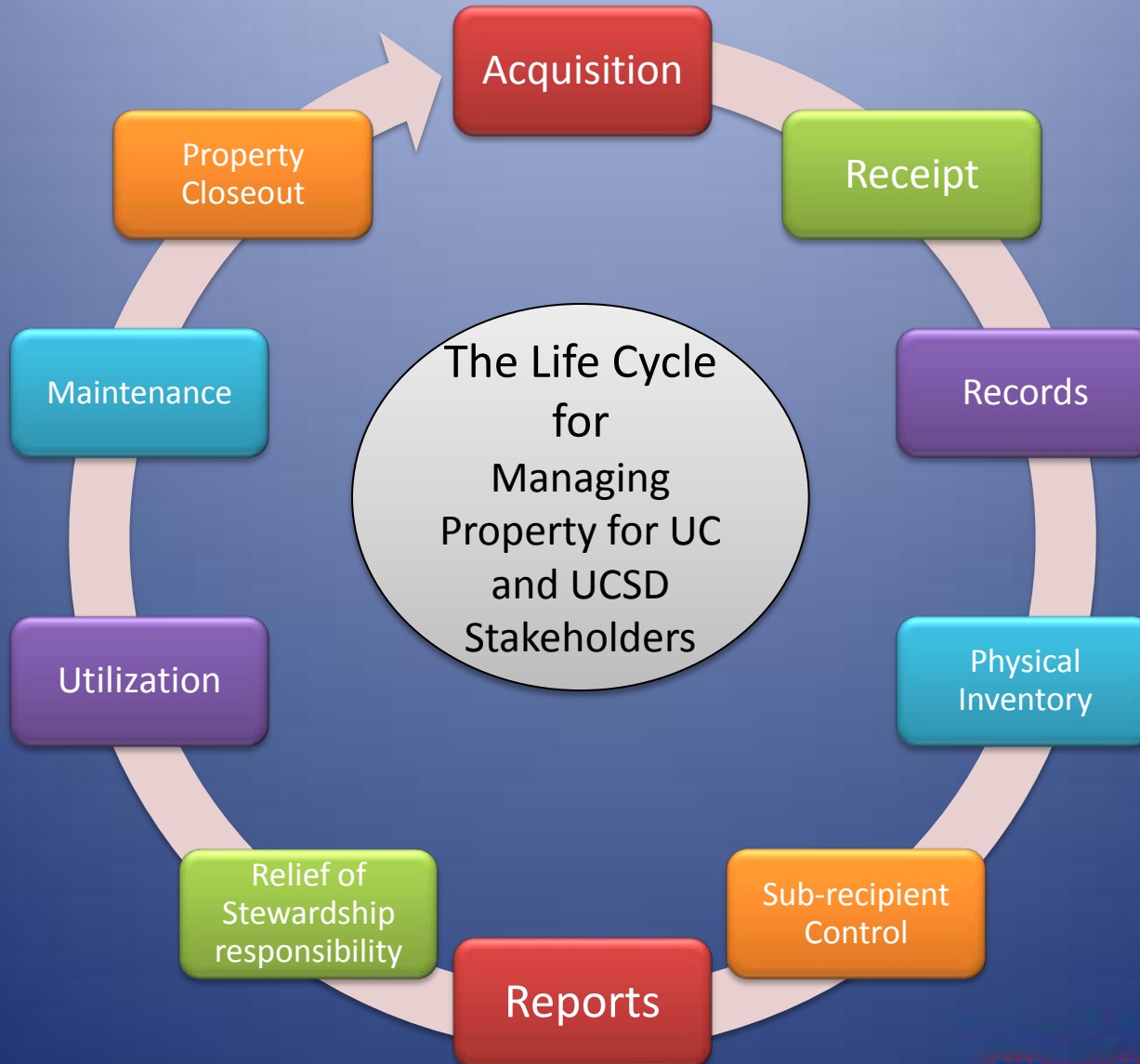
[BUS-29](#), Management and Control of University Equipment, which governs management and control of university equipment.

[BUS-38](#), Disposal and Transfer of University Equipment, which governs disposal and transfer of university equipment

[Equipment Management Basics](#).

Review the BUS 29 for Definitions (pp. 5-9).

Ten outcomes reflect the general sequential nature of the property management process



Acquisitions

IFIS/Marketplace Requisitions

- Requisitions are completed by the department buyer and completed and approved by the Professional Buyers ([64xxxx Account Codes](#))
- All Equipment PO's are reviewed by Equipment Management and updated in CAMS.
- CAMS Acquisition Process (Asset Status)
 - Import PO Report Detail: Unapproved Asset
 - Equipment Management Review: Pending
 - Receipt of Equipment: Active (Invoice Detail)

ACQUISITION – University Inventorial Equipment
(pp. 13-15, BUS 29)

ACQUISITIONS – Under Awards with Extramural
Sponsors (pp. 16-18, BUS 29)

- Top 3 Acquisition Methods: Purchase Orders, Gifts, Fabrications, [BUS 29 Acquisitions](#)
- Awards: Office of Contract and Grants and Acquisitions of Government Equipment

Receipt and CAMS

- Generally, the University of California has a decentralized receiving structure. For the purposes of establishing control of all inventorial equipment in the care, custody or control of UCSD, the receiving unit (Custodial Department) will verify and document receipt of all such inventorial equipment and enter the receipt date and other pertinent information such as serial number, into CAMS.

Records

- Campus Asset Management System (CAMS)
- Designed to maintain complete, current, and auditable records for inventorial equipment in the care, custody and control of the University of California (UC Property Management Plan, 2008).
- [BUS 29 Records](#)
 - CAMS Asset Detail and Accounting Detail

Physical Inventory

- At least every two years, the custodial department must make a physical inventory of all University Inventorial Equipment, Government Inventorial Equipment, Other Government Property, and Other Inventorial Items.
- **UCID tag**
 - All inventorial equipment at UCSD, no matter who has title to it, has an identification tag affixed to it. Printed on the tag is a barcode, a brief description of the equipment, and the equipment's UCID number.
- **UCID number (066030723):** The UCID number is a nine-digit number that, when broken down, identifies the following:
 - First pair of digits indicates the calendar year the equipment was acquired.
 - Second pair of digits identifies the campus that originally acquired the equipment.
 - Last five digits designate the sequential placement of the equipment in [CAMS](#).

Sub-Recipient Control

- The custodial department is notified when upon the issuance of
- any Sub-Agreement that involves the acquisition of Government or other Sponsor-titled inventorial equipment or other property reporting requirements.
- A Sub-Agreement language will address, at a minimum, the following areas:
 - Acquisition and Title
 - Records
 - Physical Inventory
 - Reports
 - Disposition
 - Risk and Liability
 - Stewardship Responsibilities

Reports

- We ensure that all internal reports (including, but not limited to, physical inventories, inventorial equipment value reconciliation, and total campus inventory and custodial code reports submitted annually to UCOP) are submitted accurately and in a timely manner.
- CAMS Reports tab is where all users can create reports regarding their inventorial equipment.

Relief of Stewardship

- Relief of Stewardship responsibility will take place when:
 - Transfer of title, without further obligation, is granted to UC San Diego
 - Inventorial equipment and other property is delivered, shipping, or otherwise disposed in accordance with agreement terms or as directed by the cognizant Contracting Officer or other authorized representative
 - Consumed or expended during agreement performance
 - Processed through an inventory adjustment
 - Relieved of accountability through a lost/destroyed/theft report
 - Processed as surplus or through approved surplus procedures
 - Abandoned in accordance with agreement terms
 - (Refer to the BUS 38 for procedures, surplus transfer/disposal)

Utilization

- Primary responsibility for the proper utilization of inventorial equipment and other property rests with the Custodial Department.
- Government inventorial equipment and other property, whether furnished or acquired, will be used for the purpose for which it was acquired or as authorized.

Maintenance

- Primary responsibility for the proper maintenance of inventorial equipment and other property rest with the Custodial Department.
- Perform maintenance to the degree necessary to maximize the useful life of inventorial equipment and other property while in our care, custody or control.

Property Closeout

- [BUS-38](#), Disposal and Transfer of University Equipment, which governs disposal and transfer of university equipment
- Surplus Transfer Request (STR), creating and approving STRs in CAMS – Transfers tab
- Disposal using CAMS – Disposal tab

Thank you

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