

PROPERTY RECORD/INVENTORY RESPONSIBILITY CHECKLIST

Updated 8/1/19

Each department and school is held responsible for accurately maintaining records related to its property and safeguarding all property (i.e. furniture, fixtures, equipment, and supplies) assigned to its site. Listed below are the Administrator's and Property Custodian's responsibilities:

- Complete the Pre-Inventory process before the scheduled annual inventory by printing out the M209 Screen.
- Make sure all building and room numbers are updated in TERMS by using the M280 screen. If a serial number is missing, please email the serial number to the Property Records Technician.
- Require staff to complete an annual signed *Borrower Responsibility Form* for all items that will be in their possession and away from School District Property. Any property record item or equipment that has left the premises must be brought back to the facility during the annual physical inventory.
- Complete the *Property Record Items Out for Repairs Form* when an item leaves the premises and is out for repair. If an in-house repair has been requested, a copy of the District's "Heat Ticket" must be attached to this form. If the repair has been requested by an external company, documentation from the contracted company must be attached showing the item is in their possession.
- Stolen property must have a police report issued as soon after the incident as possible.
- A *Donation Form* must be completed for all property donations. If the item is valued at \$1,000.00 or greater, a *Property Records Addition or Change Form* must be completed and sent in with the *Donation Form*. All donated items must be submitted to the School Board for approval.
- A *Donation Form* and *Property Records Addition or Change Form* must be completed for all donated vehicles. These forms along with the title and registration must be hand-delivered to the Supervisor of Purchasing.
- All surplus or transferred property must be submitted on the *Property/Equipment Transfer/Location Change* form which is signed by the School Principal or District Department Administrator. All federally funded property must be signed off by the Federal Projects Coordinator **BEFORE** the property leaves your facility.
- A *Request to Trade-In Property Records Equipment Form* must be completed and approved by the School Board before a Purchase Order is approved and issued by the Purchasing Department.
- Each Purchase Order Item Description should start with the noun instead of the item number. Example: Computer, Laptop
- Items purchased through Internal Accounts that are over \$1,000 must be recorded in the District's Property Records System. Send a copy of the Purchase Order, voucher, and a completed *Property Records Addition Form* to the Property Records Technician.
- Software purchases should have the invoice and purchase order printed with the attached property record label.

All forms for the District's property and the tentative annual inventory schedule are on the School District web site: