

Federal Technology/Equipment Inventory Process Procedures

The U S Department of Education defines equipment as any instrument, machine, apparatus, or set of articles that meets all the following criteria:

EDGAR (Education Department General Administrative Regulations)

Uniform Guidance §200.313 Equipment.

(d) Management requirements. Procedures for managing equipment (including replacement equipment), whether acquired in whole or in part under a Federal award, until disposition takes place will, as a minimum, meet the following requirements:

(1) Property records must be maintained that include a description of the property, a serial number or other identification number, the source of funding for the property (including the FAIN), who holds title, the acquisition date, and cost of the property, percentage of Federal participation in the project costs for the Federal award under which the property was acquired, the location, use and condition of the property, and any ultimate disposition data including the date of disposal and sale price of the property.

(2) A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years.

(3) A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft must be investigated.

Process for all schools/program budget allocations for furniture/equipment/technology

1. Approval sequence

- Grant: 1st - MDE
 - 2nd - Department of Improvement and Innovation (DII)
 - 3rd - Finance Department
- General: 1st - Program Directors/building principals
 - 2nd - Finance Department

2. Ordering: Schools / Programs create purchase orders with approval from Principal/Director. All technology orders will be shipped to the Technology Department. Any equipment will be shipped directly to the building. It is the responsibility of the building/department to insure the item is tagged and an accurate record is kept.

- Order Approval sequence
 - 1st - Director of Technology Department is included in all purchase order approvals
 - 2nd - DII staff members review and approve all grant purchase orders

After approving purchase order Office Manager creates/submits Technology Department work order indicating the PO number of the order, item, funding source and unit cost for each item.

3. Labeling and Database

Once the technology/equipment/furniture order is received in the Technology Department

- Label tags for the equipment will be created which will include the following:
 - District name, funding source, purchase order number and cost.
 - Technology Department is responsible for creating and maintaining an electronic spreadsheet containing equipment data for each piece of equipment over \$100 purchased

with grant funds which include the following: (EDGAR *Uniform Guidance §200.313 (1)*)

School/Building	Serial number
Description of the equipment/type number/Date Manufacturer/Make/Model	Purchase order funding source
Location of the item	Cost
Asset/label tag #	Vendor number

4. Compliance Monitoring

- Department of Improvement and Innovation will provide school principal with school's technology database file in school's Dropbox folder. Principal will verify all assigned equipment is accounted for and in the correct location 2x a year. This verification will include new additions and location of the equipment. All changes (additions or deletions) will be communicated to Technology via email.
- Technology Department will verify proper labeling, location of all equipment every 2 years as of March, 2014. (EDGAR *Uniform Guidance §200.313(2)*)
- Department of Improvement and Innovation (DII) staff will bi-annually monitor/audit to verify proper labeling and location of all grant purchased over \$100 furniture/ equipment/technology. If not properly located and labeled, the building will have 2 weeks to correct the issue and the assigned DII staff member will return to the building to verify the correction.
- The Assistant Superintendent for Instruction will ensure completion of the process.

5. If equipment is moved

- From original location to another location within the school/building, it is the responsibility of the principal to notify the Technology Department via email to update the Technology database on-line portal.
- To another building/site, it is the Technology Department responsibility to move equipment and update the database on-line portal.

6. If equipment is needed outside the assigned building (such as for Professional Development or a Conference)

- A written request must be submitted and approved by the administrator prior to the desired date(s) and must be for no more than 1 week. The administrator must maintain record.
- Approved request must be submitted to the Department of Improvement and Innovation (DII).
- This is a case by case request and is by exception only.

7. Lost or stolen

- School principals/ administrators will notify the Technology Department and Public Safety if equipment is lost or stolen and submit proper forms.

8. Documentation

- The Department Improvement and Innovation (DII) will provide the Technology Department a legend for account numbers. This information will be updated in the Technology database
- The Department Improvement and Innovation will request reports for equipment audits semi-annually and as needed if requested by MDE, auditors and/or central administration.
- The Technology Office will query the database and extract the necessary information, upon request, and send to appropriate school or department.