



STATE UNIVERSITY OF NEW YORK  
DOWNSTATE MEDICAL CENTER

# **PROPERTY CONTROL USER MANUAL**

*PROPERTY CONTROL  
AT  
DOWNSTATE MEDICAL CENTER*

LOCATION:	BASIC SCIENCES BUILDING ROOM 3-145 (3 <sup>RD</sup> FLOOR OF THE OLD LIBRARY AREA)
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PROPERTY CONTROL SYSEM USER INSTRUCTIONS  
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**NOTE:** All Property Control Forms can be found on the Downstate Website under the Finance Division.

[UPDATED 10/08]

**Mission Statement**-The mission of the department is to maintain, update, and provide equipment and furniture related data and services to the Downstate Community. This includes tagging, surplus and transferring equipment, in addition to creating various departmental reports as needed or requested by individual departments. Our aim is to accomplish this in a timely, efficient, and accurate manner by processing various assets transactions, and disseminating vital information as it becomes available.

### THE SUNY PROPERTY CONTROL SYSTEM (PCS) OVERVIEW

The SUNY computerized Property Control System (PCS) provides a means for uniform reporting and control of capital assets by all SUNY campuses. It was designed to meet the requirements of the NYS Division of the Budget and the Department of Audit and Control, as well as the needs of the SUNY System for projecting and budgeting funds required to replace old and/or obsolete equipment.

The SUNY System Administration in Albany and the SUNY campuses maintain the system jointly. An inventory file for each campus is stored on the System Administration computers; the computer programs update the system files and generate various reports. The campus Property Control Office (PCO) is responsible for maintaining accurate and updates equipment records and transmitting (via local terminals) the data changes necessary to keep inventory records current. Current inventory records is one of the many responsibilities of the Property Control Office, another major function is to assist departments with physical inventories of all assets, as mandated by the Office of the State Controller.

Each campus Property Control Office is responsible for administering their inventory maintenance system. This includes:

- Placing asset tags on new equipment or furniture that is PCS eligible.  
(Currently, the threshold capitalization policy is \$5000 for state and RF assets with some exceptions.)
- Preparing, entering and auditing PCS update transactions.
- Reconciling new asset data to equipment expenditure records.
- Providing guidance to Equipment Coordinators while conducting equipment inventory.
- Conducting independent record audits.
- Coordinating surplus equipment disposals.
- Informing departments of proper procedures for equipment disposal, inventories, and record maintenance.

Each department or group of departments is responsible for following established procedures to control and dispose of equipment and report events, such as equipment location changes or thefts, which require record updates. Annual inventories are required by the State and at most SUNY campuses they are conducted by the PCO department with the assistance of the departments.

At each campus an Equipment Coordinator has been designated in each department or group of departments. This person is responsible for routine task related to Property Control including:

- Maintaining unit equipment records
- Reporting losses or thefts
- Submitting proper forms for surplus equipment and updating records for equipment additions and moves
- Assisting with the annual physical inventory
- Providing Property Control Office personnel with requested information and access to the equipment for tagging and/or audit purpose

**Accurate** equipment records are important to the campus for many reasons:

- As a basis for projecting funds required to replace old and purchase new equipment, and to support budget requests for these funds
- To enable capital asset accounting and support the Institutional Cost Report (ICR) on which hospital reimbursement rates are based
- To meet State, SUNY, Federal and Research Foundation requirements for reporting and control
- To establish accountability and increased security against pilferage of vulnerable equipment
- To improve equipment and space utilization through identification of property that is surplus, unusable, or underutilized

These benefits can only be realized through the cooperative efforts of departments and the Property Control Office.

### **PARAMETERS FOR ASSET INCLUSION**

General Rule- Assets having a useful life of at least two years, which are not consumed in the course of use, and the original cost (OC) and the cost of reproduction (COR) are \$5000 or more new, are PCS eligible.

Exceptions:

Funding Source - Research Foundation

1. \$5000 for most assets
2. \$500 for State Awards

**NOTE:** The PCO will determine eligibility of assets for inclusion, following the applicable guidelines.

[UPDATED 10/08]

## **PROPERTY CONTROL SYSTEM**

### **GLOSSARY OF TERMS**

Required data is indicated in shaded gray and items uniquely required for SURF assets are noted with an asterisk (\*).

#### **Basic Data**

**Account Number/Department Code/Function Code:** The 10-digit budget and accounting code identifying in the PCS, the department responsible for the property or the account to which the purchase or lease is charged. I.e. Function code.

**Acquisition Date:** The month and year acquired based upon invoice vouchers or other suitable alternate. This date should reflect the approximate date of receipt by the campus but not necessarily the date that equipment was put into service by the Location Unit. The entry is recorded as YYYYMM.

**Addition:** Transaction Type “2”

A transaction which posts a new asset record to the PCS master file.

**Additional Description (Lines 1-7):** Data entered by Campus personnel which further describes an asset or supplies additional information relating to the asset. Data is entered to these fields through a P-107 transaction.

**Adjustment:** Transaction Type “5”

A transaction which posts an alteration to the quantity, original cost, cost of reproduction, reserve, or maintenance cost field of an asset record.

**NOTE:** Adjustments will proportionately adjust the Cost of Replacement (COR), if no COR adjustment is entered. If no change to the COR is required, an adjustment entry of one cent (.01) on the same screen should be made.

**Agency File Number/Award Number:\*** Identification number associated with an asset during capital equipment selection/approval process.

**Appraisal Class Code:** Appraisal class codes, a three digit number that identify the major equipment categories included in the PCS.

000 Plant (M & O Equipment)

100 Food Service

200 Mobile

300 Office/classroom/Dorm Furniture

400 Office & Printing Equipment

500 Audio Visual & Performing Arts

600 Physical Education

700 Music Instrument

800 Laboratory Equipment & Crafts

900 Hospital Equipment & Furnishings

Example: 832100=Appraisal/class code for spectrophotometer

**Asset:** Any item of property owned by or housed in Downstate Medical Center, is to be included in the PCS. (See Parameters for Asset Inclusion).

**Asset Description:** Generic name of the item, followed by meaningful modifiers. (Refer to class code listing Appendix A for accepted descriptions.

**Asset Number:** A unique 10-position identifier assigned to each item entered into the PCS. This number is affixed to equipment asset which serves as item's identification and its linkage to PCS data base. Usually an asset tag number. (See Exhibit I for specific details relative to asset number format).

**Book Inclusion Code:** Indicates if an asset is to be depreciated.

0 = Include for depreciation.

1 = Do not depreciate.

**Budget Commitment Indicator:** A flag indicating whether or not funds have been allocated for normal or scheduled replacement. Flags to be used are:

X = Item Budgeted

Blank = Not Budgeted

\* This indicator should be set according to replacement funding and purchasing priorities. Once set, the property record should be limited to transfer, surplus and retirement transactions.

### **Building Abbreviation**

An alpha-numeric building abbreviation designation is recorded as shown in the SUNY Building Characteristics Inventory (BCI) and Physical Space Inventory (PSI) System. It is necessary that the exact BCI/PSI building designation be utilized in PCS. The building abbreviation "**GROUND**" will be accepted as a valid mismatch to the BCI/PSI. The Campus current building codes include:

#### **Building Abbreviations**

ADMFAC	Administrative Facility Building/151 E.34 Street
ANNEX2	Trailer- E.35 Street
BASSNC	Basic Sciences Building/450 Clarkson Avenue
CHCSB	CTR/Health Services - Throop Avenue Clinic
DIACTR	Dialysis Center - 710 Parkside Avenue
EC-LC	Early Childhood learning Center
FHS	Family Health Services - 840 Lefferts Avenue
GARAGE	Parking garage on E.34 Street
HSEB	Health Science Education Building - 395 Lenox Road
LOFTA	157-159 Atlantic Avenue
RESHL7	Residence Hall - 811 New York Avenue-VII
RESHL8	Residence Hall - 825 New York Avenue
RESHL9	Nurse's Residence - 440 Lenox Road
SRHKCH	Senior House - Kings County Hospital
STU-CT	Student Center - 394 Lenox Road
UNTHHP	University Hospital - 445 Lenox Road
2171FH	2171 Nostrand Avenue at Flatbush Avenue - Midwood Clinic
222L	222 Lenox Road
224C	224 Clarkson Avenue - Repair Garage
240C	240 Clarkson Avenue - Warehouse
369C	369 Clarkson Avenue - Parking Lot
410LEN	410 Lenox Road & E.34 Street - SUCF Trailer
420LEN	420 Lenox Road – Labor Relations
711PSA	711 Parkside Avenue - Administrative Building

**Campus Location:** The standard SUNY campus number designation.

	<b>SUNY Location Code</b>	<b>SURF Location Code</b>
Downstate	2810	412

**Campus Type:** A code describing the type of campus at which the asset is located.

3 - Health Science Center

**Campus Use Flags:** Three fields are reserved for use by the local campus. Data in these fields is meaningful to the local campus only.

**Campus Flag 1** - Campus Use -A two-character alpha/numeric field made available for campus assignment and use. Currently being used to indicate physical inventory year i.e. 2007–2008 will be 78.

**Campus Flag 2** - Campus Use -A four-character alpha/numeric field made available for campus assignment and use. Currently being used to indicate TELP and COPS funded assets.

**Campus Flag 3** - Campus Use - An eight-character alpha/numeric field made available for campus assignment and use. Currently being used to record the SMIC # of an asset.

**Cannibalize:** To dismantle an item for parts to be used as replacements in another unit.

**Change:** Transaction Type “6”

A PCS transaction used to alter the following data in an existing asset record: Appraisal Class Code, Extraordinary Items, Campus Type, Property Account, Condition, Fund, Cost, Utilization, Status, Description, Original Campus, Original Building, Agency File Number, Manufacturer, Model, Serial Number, Trend Exclusion, Project Number, Acquisition Date, Estimated Life, Space Type, Space Name, Square Feet, Maintenance Code, Purchase Order Date, Purchase Order Number, Date Received, Maintenance Interval, Maintenance Date, Warranty Number, Warranty End Date, Depreciation Begin Date, Medicare Account Code.

**NOTE:** Typing an asterisk (\*) in the first position of a field will reduce value to zero or blank.

**Class Code:** A six digit standard code used to classify similar equipment. (Refer to class code listing Appendix A for accepted class codes.

**Complete Retirement:** Transaction Type “8”

When an asset is no longer being utilized, it has to be removed from the PCS database and changed to an inactive status.

**Complete Transfer:** Transaction Type “3”

A PCS transaction used to change the location in an asset record.

**Control Account:** The account number (function code) associated with the department responsible for the item. This will be different from the purchase account in the case where equipment is purchased from an IFR account or an account not assigned to the department using the equipment (i.e. 8600960000 = Academic Equipment Replacement)

**Condition Code:** Based upon inspection of an asset at time of receipt, annual physical inventory or circumstances affecting condition change, a code should be assigned to describe the condition of the asset. Condition may also be updated as part of the bi-annual SURF Physical Inventory or annual physical inventory.



<u>Condition Codes</u>	<u>Definition</u>
E - Excellent	New and/or used equipment in excellent condition.
G - Good	Used equipment which has not deteriorated in condition or appearance, and which can continue in use without repairs or renovation.
F - Fair	Used equipment which has deteriorated in condition and/or appearance. Can be continued in use but may require repairs or renovation (i.e. mechanical, electrical) within one year.
P - Poor	Used equipment that has deteriorated in condition and/or appearance and which may require repairs or renovation prior to limited immediate use.
S - Scrap	Equipment which has no value other than basic material content. This condition includes equipment which has been cannibalized for spare parts. Equipment requiring significant repairs, for which parts are not available, or non-repairable items and equipment which has been thrown out shall be reported under this condition.

**NOTE:** Obsolescence, when equipment is outmoded and technologically old, should not impact the condition code.

A definite relationship exists between the condition of an asset and its useful life. An asset in fair or poor condition should not be expected to survive for a full or normal life period.

An asset which becomes obsolete for the purpose it serves should be replaced even though recent maintenance may have improved its condition.

**Cost Code:** Cost at acquisition will be based upon actual historical or recorded cost, the current fair market value, or an estimated cost based upon similar purchases.

A - Actual  
E - Estimated  
M - Fair Market

**Cost of Replacement (COR):** Defined as the cost new, at a specific date, such as acquisition date, based upon prevailing material, labor and installation costs. For assets acquired new, original acquisition cost and cost of replacement will, in most cases, be the same. However, under a new acquisition, if a discount is excluded from original cost, the cost of replacement should reflect the current asset value. For assets acquired used, or at one-time-only discount, the Property Control Custodian will have to estimate COR in order to facilitate budgeting requirements.

**Current Provision:** An asset's current annual depreciation, in dollars and cents.

**Data Base Date:** The date on which the property master file was created.

**Date Received:** The date recorded reflects arrival date at the user receiving point. The date is in month, day, year format (MMDDYY).

**Deletion:** Transaction Type "1" or Transaction Type "21" for Additional Description

A PCS transaction used to remove an existing asset record from the master file. The year to date reserve must be zero in order to delete an asset.

**Department:** DMC organizational unit which owns or controls an item of property. In the PCS, departments are identified by account codes DMC.

**Department Code/Account Number/Function Code:** The chart of accounts, (as maintained and published by the SUNY Controller's Office), a 10-digit budget and accounting code that will provide departmental stewardship identification of each asset.

**Depreciation Begin Date:** The year and month (YYYYMM) the depreciation calculation begins for an item of property. It is the date received on campus.

**Description:** Generic nomenclature which identifies the asset. Proper noun should be stated first, followed by meaningful modifiers within the space allotted.

**Disposal Code:** This code reflects the accounting treatment for the retirement or disposal of a depreciable asset. Valid codes are:

Blank - Gain or loss not recognized

T - Trade-in

1 - Gain or loss recognized

**Equipment Coordinator (EC):** A person that is designated by the department head to be responsible for routine tasks related to Property Control including:

- . Maintaining department equipment records.
- . Reporting losses or thefts to the Public Safety Department.
- . Submitting proper forms for equipment surplus, transfer or removal from the building.

**Extraordinary Item:** An asset that possesses some outstanding characteristics that must be considered should the asset have to be relocated, e.g., it is oversized, requires special floor supports, requires air-conditioning, etc. An "X" indicates an extraordinary item. Usage of the additional description can document the extraordinary condition.

**Floor:** A two-digit numerical series to designate the various levels within a building or structure. Standard codes utilized are:

SB/00 - Sub Basement	MZ - Mezzanine
0B - Basement	PL - Plaza
01 - First Floor	97 - Penthouse/Attic
02 - Second Floor	98 - Roof
03 - Third Floor	99 - Yard and Outside

For equipment located in a penthouse on the roof of a respective building, use the established floor number of 97 and the appropriate space number as shown on the PSI. If the penthouse is not specifically shown on the PSI, use 97 for the floor number and "PENTHS" for the room number.

For equipment located on the roof of a respective building, use 98 as the floor number and "roof" as the room number.

For equipment serving a specific building but not located outside on the ground, i.e., cooling towers, etc., the following procedures should be followed:

- a. The building number will be the same as that respective building.
- b. Floor number will be 99
- c. Room number will be Y & O

**Function Code/Account Number/Department Code:** The 10-digit budget and accounting code identifying, in the PCS, the department responsible for the property, or the account to which the purchase or lease is charged.

**Fund Code:\*** The fund code represents the primary source of funds used to acquire the asset. Note that all SURF assets, regardless of source, (i.e. donated, Federal, etc.) are coded with Fund Code 6.

- 1 - State, Capital - First Instance (Bonded)
- 2 - State, Capital - Hard Dollar (Appropriated)
- 3 - State, Operating
- 4 - Dorm Authority
- 5 - Faculty Student Association (code as a non-depreciable asset)
- 6 - Research Foundation
- 7 - Gift
- 8 - Other
- 9 - Mixed Source Funds
  
- A - Federal
- B - Endowment for
- C - Grant
- D - Income Reimbursable
- E - Loan
- F - ASC/FSA - State Owned
- G - Dormitory Replacement
- H - Operating Replacement
- J - Dorm IFR
- K - Campus Foundation (tag with state tags and code as a non-depreciable asset)
- L - Hospital IFR
- M - State, Operating (COP)
- N - Tax-exempt Leasing Program (TELP)

PCS can record multiple fund sources by either using Mixed Fund Code 9 and describing the sources or by creating prorated asset records. Prorated records would indicate proper fund code, proper inclusion code for depreciation accounting respective percentage of both original and cost of replacement. Such split asset records will use the asset suffix (last 2 positions of asset number), be numbered consecutively, be cross referenced in an additional description and be maintained as on consistent record. Multiple RF grant sources also require prorating using the suffix available after the "R" in the 9<sup>th</sup> position.

<u>Asset #</u>	<u>Fund Code</u>	<u>Original Cost</u>	<u>Cost of Replacement</u>
1003856701	3	\$450	\$600
1003856702	A	\$225	\$300
10038567R0	6	<u>\$225</u>	<u>\$300</u>
		\$900	\$1,200

The above example shows prorated funding (50%, 25%, & 25%) for three indicated fund sources used in the purchase of the individual asset. Other data fields on the three individual records will be identical.

**Gifts/Donations:** Donated assets to the campus must be formally accepted by the University and entered in to the Property Control System. Regulations surrounding such gifts are numerous including some requiring formal acceptance by the SUNY Board of Trustees. Any department contemplating acquisition of a donated asset must contact the PCS Office to determine the specific process required for the proposed gift Acceptance.

**Group:** See Property Account Code.

**Inclusion Code:** An alpha code which denotes whether or not a group or unit of property should be included for book accounting purposes and whether or not the property should be depreciated. When an item is surplus and added to the PCS for the first time, the inclusion code and trend exclusion code is 1.

- 0 -include for depreciation and accounting
- 1 -include for accounting, do not depreciate (used for assets <\$5000, FSA and Campus Foundation assets)
- 2 -exclude from accounting and depreciate (usually used for insurance property only)

Assets which require replacement funding should be included for accounting purposes. Assets not requiring replacement funding such as fleet vehicles (OGS) or artworks should be excluded.

**Inspector Code:** Not used

**Inspection Date:** Not used

**Location Unit:** A department responsible for controlling equipment. It may be one department or several related departments with nominal equipment holdings.

**Maintenance Cost:** A record of the cost of normal or scheduled maintenance. Maintenance Cost is accumulated in the asset record throughout the life of an asset.

**Maintenance Date:** A record of the month, day and year in which a group or unit of property received its most recent normal or scheduled maintenance.

**Maintenance Interval:** The standard number of calendar days between successive scheduled maintenance.

**Manufacturer:** Name of manufacturer.

**Medicare Account Code:** Indicates the standardized American Hospital Association (AHA) account code for which the asset qualifies. Valid codes are their AHA equivalences are:

- 1 = Account 451 - Land Improvements
- 3 = Account 453 - Buildings
- 5 = Account 455-1 - Fixed Equipment - Building Services
- 6 = Account 455-2 - Fixed Equipment - Built In
- 7 = Account 457 - Major Movable

**Model:** Series, type or size, as indicated by the manufacturer.

**Net Proceeds:** The amount of cash received from the sale of an asset, minus any expenses incurred in its disposal. The amount is to be entered in dollars and cents upon retirement of the asset.

**Negate Code:** This code is used exclusively to reverse a retirement made in error. When set to "x", it indicates to the PCS that all dollar amounts for the given asset are to be processed with a sign opposite of that entered in the transaction. It is used exclusively to reverse a retirement made in error. Used for transaction processing and not maintained on master file.

**Negative Retirement:** Transaction Type "9"

To reverse a retirement made in error.

**NOTE:** To process a negative retirement – Use P101 screen, transaction date must be date of retirement and all data must be re-added. Changes can be made to the data.

**New/Used Indicator:** A one-character code used to indicate whether an asset was acquired as a new item or as a used item.

N = New

U = Used

\*If this field is left blank, the system will default to "N" (new).

**Off-Campus Location Flag:** A one-character code used to indicate that the asset is not located at the main campus or a branch of the main campus. (Located in a non-PSI area.)

X = Asset located off-campus

**OGS Group:** Code specified by the Office of General Services to classify similar types of equipment. Lists of valid OGS group codes are available from the campus Business Office.

**OGS Surplus Status Code:** A code designating the surplus status of an asset. The entry for this field is generated by the Property Control System.

1 - To OGS

2 - OGS Disposition Authorized

3 - Other Disposition

**Original Campus Building Identification:** Alpha-numeric PSI designation for the building in which an item was located at the original (funding) campus. Normally, this field in the asset record will be filled in by the PCS when an item is transferred from one campus to another.

**Original Campus Location Identification:** Same as above, only referring to the 2800 – series code for the campus.

**Original Cost:** The original cost is the purchase price plus ancillary charges necessary to place the asset in its intended condition for use. These ancillary charges include costs such as freight and transportation, fuel surcharges, installation (labor and materials), professional fees and legal claims directly attributable to asset acquisition. For assets acquired under certificates of participation (COPS), the original cost should include COPS' fees such as broker's fees, underwriting fees, attorney's fees, OGS fees and insurance fees. Original cost excludes discounts, financing charges and maintenance costs. For assets which are donated and therefore have no acquisition cost, original cost should be recorded based on an estimate of the fair market value of the asset at the date of acquisition.

**Partial Retirement:** Transaction Type "7"

A PCS transaction used to retire part of a group controlled asset.

**Partial Transfer:** Transaction Type "4"

A PCS transaction used to change the location of the portion of a group-controlled asset.

**Physical Space Inventory (PSI):** A SUNY computer based inventory system for campus facilities which is maintained locally by each campus. Location data in the PCS must be compatible with the PSI.

**Project Number:** SUCF project number under which a capital funded asset was acquired.

**Property Account Code (Group):** The property account code represents the standard SUNY equipment group classification system. (See Exhibit II for definitions).

Property Account Code

B

1

Classification

Buildings/Site/Infrastructure

Group I

2  
3Group II  
Group III

**Property Control System (PCS):** A computer based inventory system administered centrally by SUNY/SUCF and maintained with local campus input.

**Physical Space Inventory (PSI):** A SUNY computer-based inventory system for campus facilities which is maintained locally by each campus. Location data in the PCS must be compatible with the PSI.

**Purchase Order Date:** Month, day, year of a purchase order or contract under which the asset was acquired.

**Purchase Order Number:** The agency purchase order or contract number under which an asset was acquired. The purchase order number is matched to other files; therefore, it is important that it be recorded exactly as it appears on the purchase order. Purchase order numbers with leading zeros should have the leading zeros recorded in the property record. If the asset is purchased through TELP or COPS funds, an Installment/Purchase agreement or other type of contract where a PO is not used, the contract number should be entered in this field.

**Quantity:** The physical quantity of asset description.

**NOTE:** When adjusting the quantity, adjust (Transaction Type 5) by the difference. (I.e. in PCS the quantity is 1 and it should be 10, adjust by 9. In PCS the quantity is 6 and it should be 1, adjust by 5 - ).

**Received Date:** Month, day and year of arrival date at the user receiving point.

**Remaining Life:** An estimate is to be made of the useful life of each unit or group of assets in the System entered on the transaction and is used to calculate total life.

#### **ASSET LIFE CALCULATION**

For non-depreciable assets, the PCS calculates an **expiration date** by adding transaction remaining life to the transaction date (month and year). The asset's **total life** is determined as the time from the acquisition date to the transaction date plus remaining life entered. For depreciable assets, the expiration date is calculated by adding the asset's total life to the depreciation begin date.

**Reserve:** An item's accumulated depreciation, in dollars and cents.

**RF Ownership Code:\*** A one-character code used to indicate the ownership status of Research Foundation assets. The code is required for all RF assets (fund code of 6).

- A - SURF Administrative Equipment
- B - SURF Research Equipment
- C - Contractor Acquired Equipment
- D - SURF Donated Equipment
- G - Federal Government Furnished Equipment
- I - SURF Funded/Insurable (mostly electronic equipment >\$500 insured for fire and theft located in RF office.)
- L - Loaned Equipment
- N - Non-Federal Grant Equipment (Title Vested w/RF)
- O - SURF Institutional Support (Other)
- R - Federal Grant (Title Vested w/RF)
- T - Transfer of Ownership from SURF to State (Non-RF Assets Only)

**Reserve:** An item's accumulated depreciation, in dollars and cents.

**Room Identification:** The PCS provides a 6-position alpha/numeric field in each asset record for identification of the room or space in which an asset is located. This designation must conform to the PSI designation for the space.

**Room Number:** Room or space numbering convention should reflect the location of the asset and must conform to the PSI system. Room "Y&O" (yard and outside) is used to identify equipment located outside buildings and room "ROOF" is used to identify equipment located on a building's roof; these are valid exceptions to the PSI match.

**Serial Number:** Alpha and/or numeric series specified by the manufacturer, an individual and non-repeating discrete identifier.

**Service Center/Cost Sharing Code**

S – Service Center Code

C – Cost Sharing Code

**Space Name Code:** A 4-position code providing a more detailed description of a space than the space type. Code can be obtained from the PSI file and manual.

**Space Type Code:** A 4-position code which classifies spaces by major category of use. Code can be obtained from the PSI file and manual.

**Square Feet:** The PCS provides a 5 position field in each asset record for the total square footage of the space in which the asset is located.

**State Fixed Asset Accounting System (SFAAS):** Group III equipment valued at over \$15,000.

**SFAAS Flag Code:** A code which designates the asset's relationship to the State Fixed Asset Accounting System. This entry is made by System Administration only.

X - Fixed Asset - Ongoing Activity

R - Removed as Fixed Asset

**Split Funding Indicator:** A one-character code to be used when an asset has multiple funding sources and a separate asset number is used to represent each funding source.

P = Primary Source of Funds (Largest portion of acquisition costs)

S = Secondary Source of Funds (Smaller portion(s) of acquisition costs)

**Status Code:** A code relating to the utilization of each unit or group of active assets is assigned to each asset or indicates the basis for asset retirements.

**Active**

1 - In Use

2 - In Use - Limited (< 1 yr.)

3 - In Storage

4 - Excess to Projected Needs (University-wide Surplus)

5 - Under Repair

6 - Not in Use - Planned Repair

7 - Antiques & Art Work

8 - Shared Utilization

9 - Excess to Needs – Available for Internal Campus Surplus

G - On Loan - Out

I – Loan - In

M - Leased Equipment (State will not have Title)

N - Obsolete - In Use

Q - Lease/Purchase Title w/State – COPS/TELP

R - Re-inventory/Review

**Retired**

A - Transfer (to another campus or NYS unit, from RF to SUNY)

B - Surplus (OGS surplus process)

D - Insurance Claim (claim documentation)  
 F - Unaccountable/lost  
 H - Trade In  
 J - Pilferage/stolen  
 P - Transferred from State Control  
 S - Campus Disposal (non-vehicle)

**SURF:** State University of New York Research Foundation

**Surplus:** Excess to location unit or campus use. Items may be declared surplus due to: 1) original use/purchase no longer exists; 2) replacement; 3) broken and non-repairable or uneconomical to repair; or 4) obsolescence.

**Total Life:** The asset's total life. The entry for this field is generated by the Property Control System using campus input and is used primarily for hospital depreciation calculation. (See Remaining Life).

**Transaction Date:** The month, day and year on which a transaction was input to the PCS.

**Trend Exclusion Code:** Used to recalculate the Cost of Replacement. The type of trending to be applied to an asset's Cost of Replacement is governed by the following codes. When no code is entered, the system will default to "0".

0 = asset is trended

1 = asset is not trended (used for adding an asset to PCS that was surplus in E, G or F condition)

2 = Do not depreciate (used for assets <\$5000, FSA assets)

**Utilization Factor:** Actual use of an equipment item expressed as a percent of available (100%) usage.

**Warranty End Date:** The day, month and year (based upon warranty terms) when warranty coverage ceases on a given property item.

**Warranty Date:** The manufacturer's warranty certificate number for property acquired under warranty.

**Warranty number:** The manufacturer's warranty certificate number for property acquired under warranty.

**Year To Date Reserve:** That portion of an asset's accumulated depreciation allocated to the current fiscal year.



### **Depreciation Data - Hospital Depreciable Assets Only**

1. **Depreciation End Date:** The month/year through which the last depreciation was calculated. System generated.
2. **Depreciation Begin Date:** The initial depreciation month/year.
3. **Provision Switch:** An indication that one of the variables used to calculate depreciation has been updated during the cycle.
4. **Net Proceeds:** The amount of cash received from the sale of an asset, minus any expenses incurred in its disposal.
5. **Depreciation Reserve:** Amount of an asset's cumulative depreciation expense.
6. **Period Expense:** Amount of an asset's depreciation expense in the current depreciation cycle (usually a twelve month period).
7. **Year-to-Date Expense:** The portion of an asset's cumulative reserve allocated to the current fiscal year.
8. **Year-to-Date Excess:** Amount of depreciation expense charged to previous locations or departments (identified via transfers) for the current cycle.
9. **Current Provision:** Amount of an asset's depreciation expense for the current depreciation twelve month period.
10. **Future Provision:** Amount of an asset's depreciation expense anticipated in the next twelve month period.
11. **Medicare Account Code:** A code indicating the standardized American Hospital Association (AHA) account code for which the asset qualifies. Valid codes and their AHA equivalences are:
  - 1 = Account 451 - Land Improvements.
  - 3 = Account 453 - Buildings.
  - 5 = Account 455-1 - Fixed Equipment - Building Services.
  - 6 = Account 455-2 - Fixed Equipment - Built In.
  - 7 = Account 457 - Major Movable.

On an annual basis (normally prior to the start of the fiscal year), the COR in an asset record is trended by Systems Administration to reflect current Cost of Replacement. The previous COR is multiplied by a trend factor to derive a trended or current COR. Unit COR is calculated by dividing COR by quantity.

**NOTE 1:** If the information in any depreciation field needs to be changed, the asset must be deleted and then re-added to PCS.

**NOTE 2:** At the end of every year (Dec. 31) a depreciation report has to be run and during that time only adds, changes, adjustments and deletions can be processed. **NO** retirements until the books have been closed by SUNY Administration.

### **Property Master File Program Maintained Data**

1. **Partial retirement Count**  
For assets with quantity greater than 1, the quantity previously retired.
2. **Partial Transfer Count**  
For assets with quantity greater than 1, the quantity previously transferred out.
3. **Original Campus Location Identification**  
The campus number recorded on an asset prior to its first transfer.
4. **Original Building Location**  
The building number recorded on an asset prior to its first transfer.
5. **Campus Type**  
An alpha-numeric field whose value is a code that describes the type of campus at which the asset is located. The PCS program will automatically assign the code based upon campus location code. The Campus Type codes are included in Exhibit C.
6. **Square Feet**  
A numeric field indicating the square footage present in the room (space) to which the asset is assigned. It is obtained from the Physical Space Inventory file. This field does not require user input.
7. **Space Type**  
A code which provides a method for classifying spaces by major category of use. It is obtained from the Physical Space Inventory file and procedures manual. This field does not require user input.
8. **Space Name**  
A code selected from a standard name list to provide a more detailed description of a space. It is obtained from the Physical Space Inventory file and procedures manual. This field does not require user input.
9. **Record Added Date**  
Date on which the asset was initially added to the file. This field is a recent addition to the property record and, therefore, not all asset records will have this entry. The entry for this field is generated by the Property Control System and is the date the add transaction is processed in the update cycle.
10. **Last Transaction Date**  
Date on which the latest transaction against the property record was made. The entry for this field is generated by the Property Control System.

### **Activity Data**

1. **Activity Date:** The computer system date the activity record was created.
2. **New Asset:** For asset number change activity, the new asset number.
3. **Old Record Code:** For asset number change activity, the property master inactive record code (depreciable assets only).

### **Transaction Data**

**Transaction Type:** The action that the transaction will apply against the property master.

#### **Type**

- 1 - **Delete** - deletes an asset (and any associated additional descriptions) from the property master file. This should be used only to correct erroneous conditions, not as a normal business action.
- 2 - **Add** - adds an asset to the property master file.
- 3 - **Complete Transfer** - transfers an asset's location (department, building, room or floor).
- 4 - **Partial Transfer** - transfers part of an asset's quantity. Must have offsetting transfer out (-) and transfer in (+).
- 5 - **Adjusts** - adjusts cost data on the property master file (original cost, COR or depreciation values).
- 6 - **Change** - changes data on the asset record.
- 7 - **Partial Retire** - retires part of an asset's quantity.
- 8 - **Complete Retire** - retires an asset record.
- 9 - **Negative Retire** - re-adds a previously retired asset.

**Transaction Date:** The date that determines the most significant sequence in which transactions will be processed against the property master file.

**NOTE:** Transactions for an asset are processed against the property master file in asset, transaction date, and transaction type sequence.

## **Property Control Data Screens**

### **Input Screens**

- \* P101 - Transaction Update (Add Screen)
- P103 - Mass Transfer
- \*\* P104 - Transfer Update
- P105 - Maintenance Update
- P107 - Additional Description
- P108 - Asset Number Change (Old #/New #)
- P109 - Asset Update/Add Screen
- P110 - Surplus Status
- P112 - PCS Central Data
- P113 - Depreciation Data

### **Data Review Screens**

- \*\*\* PC01 - On screen display of an asset
- PC13 - To get depreciation reserve
- PS40 - To check if a building or room is valid (PSI Information)
  
- \* Use P101 Screen to un-retire an asset
- \*\* Use P104 Screen to retire an asset and change its status at the same time.
- \*\*\* Once in PC01 screen, enter F9 to get depreciation information of an asset.

**EXHIBIT I**  
**ASSET NUMBER FORMAT**

1. Must always be 10 positions and spaces are not recommended.
2. Position 1-2 must be the 3rd and 4th position of the SUNY campus number. This is referred to as the asset prefix. For example, an asset for Downstate Medical Center (Campus 28100) would be 10S3487600.
3. Position 3-8 is a unique asset number. An **S** in the third position indicates a State asset. An **M** in the third position followed by a 5 digit number indicates an SMI inventory number.
4. Asset numbers with a "MO" in the 9th and 10th position of the asset number are system generated if the retain asset number field is not indicated on the asset add transaction. In most cases the "MO" asset number should be converted to a serial or decal number via the asset number change transaction.
5. PARS users have the option of pre-printed bar coded labels with or without their respective asset prefix in a ten digit bar code (with 1-2 identifying the campus) or an eight digit bar code (without the campus prefix). This is valid because PARS has the option to insert the campus prefix as part of the reader process.
6. Duplicate asset numbers are not allowed in the PCS system.

**EXHIBIT II**  
**EQUIPMENT GROUP DEFINITION**

**Group B:**

This classification includes land improvements, building structures and building systems.

**Group 1:**

This classification includes equipment items connected and designed as an integral part of the building. These items are further identifiable due to their characteristics of requiring periodic maintenance, being discrete and replaceable unit items.

Examples of items which should be included in the PCS as Group 1 are:

Boilers and steam generators, Freight and passenger elevators, Motor-generator sets, Dumbwaiters, Steam turbine generators, Elevators

**Group 2:**

This equipment classification comprises those items permanently connected to building services/systems or the structure itself for which design characteristics must be coordinated with the various mechanical trades. The intent of this classification is to include fixed equipment associated with operations and activities as opposed to fixed equipment serving general building requirements.

Examples of items included in the PCS as Group 2 are:

Autoclaves and sterilizers, Lab benches, counters, tables, sinks, Walk-in refrigerators/coolers, Wall cabinets, Fume hoods, Fixed storage cabinets

**Group 3:**

Items in this equipment classification are those which require no permanent connection to utilities or the structure, that equipment which is readily moveable. The items may (1) require floor space or (2) be stored on/in other Group 2 or Group 3 equipment.

Examples of Group 3 property included in the PCS are:

Copiers	Radiology Equipment
Servers	Microscopes
Cell Washers	Patient Monitoring System
Hospital Beds	Laboratory equipment
Storage cabinets	Vehicles

**NOTE:** Does not include supplies and expendables.

### FOUNDATIONS FOR PROPERTY MANAGEMENT PROCEDURES

<u>Requirement</u>	<u>Primary Basis</u>
1. Maintain equipment inventory of items with threshold value.	NYS Accounting System User Manual (OSC), Section 3.0400.
2. Establish State equipment unit cost control value (threshold value).	System Administration and Finance and Business.
3. Tag State equipment below unit cost control value to show ownership.	NYS Accounting System User Manual (OSC), Section 3.0400.
4. Conduct annual inventory of State equipment.	NYS Accounting System User Manual (OSC), Section 3.0400.
5. State ownership and State requirements apply regardless of portion of acquisition with State funds.	Standard Operating Procedures.
6. Use of State funds/trade-in of State assets only if acquired asset is State owned.	Standard Operating Procedures.
7. State assets cannot be transferred out of State control without appropriate OGS disposition authorization.	State Finance Law, Section 178.
8. SURF asset inclusion in PCS.	Agreement between SUNY and SURF.
9. Definition of SUNY fixed asset as State and SURF.	System Administration, Finance and Business definition of SUNY's financial statement accounts. NYS Accounting System User Manual (OSC), Section III-1.
10. Establish SURF equipment unit cost control value.	SURF compliance with Federal A110 regulations.
11. Conduct biennial inventory of SURF equipment.	SURF compliance with Federal A110 regulations.
12. Annual inventory of SURF insured equipment.	SURF requirements for insured equipment.
13. Gift acceptance procedures and dollar thresholds.	SUNY Procedures Manual and The Research Foundation of State University of New York Property Management Manual.
14. Reporting of theft/loss to OSC.	NYS Accounting System User Manual (OSC), Section 7.0200, System Administration, Finance and Business, Memorandum B-456, B-177 and B-322.
15. Surplus State property by OGS.	State Finance Law, Section 178.
16. SURF equipment surplus procedures.	SURF compliance with Federal A110 regulations.

## **Forms and Instructions**

1. **New Equipment** (Equipment Addition Forms, HSCB-1-F-470-R2-11/00 – State Equipment Only [see Exhibit A] and HSCB-001-F-470-R2-11/92 – Research Equipment Only [see Exhibit B]) Purchasing sends the Property Control Office a copy of all equipment purchase orders (PO). Property Control reviews the POs determine which items should be tagged and added to the PCS. For each eligible item the Property Control Office will initiate an Equipment Addition Form and forward it to the location unit or S.M.I.C. depending on the delivery point. Upon receipt of an EA form, the Equipment Coordinator should proceed as follows:
  - (1) File the Equipment Addition form with the department copy of the PO pending receipt of goods
  - (2) When the equipment arrives, pull the PO and Equipment Addition form. Check the goods in as usual, sign and forward the PO to Accounts Payable, Box 54.
  - (3) Complete section C of the Equipment Addition form and sign it. Note the asset number, description and location on the unit equipment lists.
  - (4) Forward the complete EA form to the Property Control Office, Box 82.

**NOTE 1: TRADE INS:** When a tagged item is traded in for a discount on a new equipment purchase, the department should note this (including the decal number of the trade-in item) in the body of the purchase requisition. Property Control will then retire the trade in item from the PCS.

**NOTE 2: REPLACEMENT EQUIPMENT:** The campus Purchasing Unit requires departments to send surplus report forms along with the Purchase Requisition form when replacement equipment is being ordered. Purchasing will forward a surplus form to the Property Control Office. This allows the surplus process to begin before the new equipment arrives in order to expedite the removal of old equipment.

**NOTE 3: EQUIPMENT UPGRADES, REPAIRS:** The campus Purchasing Unit requires departments to provide the campus tag number to be included on Purchase Requisitions involving equipment upgrades, repairs, and maintenance. This information will be placed in an additional description field.

**NOTE 4: GIFTS/DONATIONS:** Donated assets to the campus must be formally accepted by the University and entered in to the Property Control System. Regulations surrounding such gifts are numerous including some requiring formal acceptance by the SUNY Board of Trustees. Any department contemplating acquisition of a donated asset must contact the PCS Office to determine the specific process required for the proposed gift Acceptance.

**NOTE 5: OFF CAMPUS:** When new equipment is located off campus, the PCO will send an “Off Campus Memo” (see Exhibit Q) along with a copy of the purchase order and the asset tag to be affixed to the equipment, to the off campus location. Upon receipt of the memo, the off campus location will tag the equipment, note the model & serial numbers on the memo, sign & date where indicated, fax a copy back to the PCO and retain the original. The PCO will then “X” the Off Campus field indicating that the equipment is located off campus; the Status will be “G” for On Loan and indicate where it is located in the additional description field.
2. **Equipment Transfer** (Transfer Form DMC 002 R1470 (8-85) [see Exhibit C]) When tagged equipment is permanently transferred from one unit to another or one room to another within the same unit, the account and/or location must be changed in the PCS accordingly. A transfer form is used to notify Property Control of the change which must be made to the asset record(s).



### **Equipment Transfer** – (cont'd)

**NOTE:** For items requiring movers, the PCO will send copies of the equipment removal form to Hospital Environmental Services (for Hospital moves) or FM&D contracted movers (for Non-Hospital moves). This form acts as the “work order” to move the items. If items are being moved between campus buildings, the movers will need an “Equipment Removal Form” (see Exhibit F) so that Security Guards will allow the equipment to be removed.

The procedures for all equipment transfers are as follows:

- (1) The Equipment Coordinator for the unit from which the equipment is being moved completes the following fields on the Transfer form (see Exhibit C)

Date  
 Date move must be completed by  
 Check if movers are required  
 Asset number (decal #)  
 Item description  
 From location (building, room, floor)  
 Account to which the item is presently charged  
 To location (building, room, floor)  
 Account the item will be charged to  
 Name of from location unit  
 Signature  
 Name of to location unit

- (2) Take appropriate actions to move equipment, update equipment lists and distribute copies of the Transfer form, as outline below.
- (3) If the equipment is going to a new unit, the new (“TO”) unit Equipment Coordinator reviews the location and account written on the Transfer form, correct if necessary, signs the form and forward it to Property Control, Box 82.
- (4) When move is completed, the Equipment Coordinator is required to sign, date and return the completed form to the Property Control Office, Box 82.

3. **Surplus Disposal** (Report of Surplus Property, form HSCB-0003 F470 R3 (3/89) [see Exhibit D])  
 When a department wishes to dispose of any equipment that is unusable, obsolete or excess to department needs, regardless of whether or not the item is tagged the EC should proceed as follows:

1. Complete a Report of Surplus Property form with the following information:

- A. The name, phone number, department name, account number and DMC box number of the person reporting the surplus property.
- B. The building and room number where assets being reported are physically located.
- C. Asset Number of each item being surplus (place a N/T- if item is not tagged).
- D. Item description-give as much information as possible including manufacturer, model and serial number.
- E. Condition of the assets.
- F. Indicate whether the item is “working” or “not-working”

**Surplus Disposal** – (cont'd)

- G. Please indicate any special instruction for removal of equipment, any necessary special handling (hazardous, fragile, heavy, large etc).
- H. The unit head or Equipment Coordinator must sign and date the form, authorizing disposal.
- I. Up to 9 pieces of equipment can be reported per form.
- J. Submit the form(s) to the Property Control Office, Box 82

**NOTE 1:** The form should contain as much information as possible since this is the information transmitted to all SUNY campuses and to the Office of General Services for disposition approval. If another campus needs the item they can arrange for a transfer. Minimal information makes it difficult to assess the potential use of the asset.

**NOTE 2:** If surplus equipment contains a refrigerant (Freon), the FM&D Refrigeration Shop must be contacted to remove the Freon, prior to disposal. FM&D will place a notice on the equipment once the Freon is removed (see Exhibit O).

2. Upon receipt of the Surplus form the PCO will:

- A. Arrange to have the asset(s) moved by sending the appropriate removal forms to either Hospital Environmental Services or the Contracted Movers.
- B. Property Control will issue a PC control number for all forms received and forward a copy back to the equipment coordinator. The PCO will return sufficient copies of the surplus form to the equipment coordinator so that they can be affixed to the surplus items.
- C. If assets were purchased with Research Foundation (RF) Funds then the PCO will complete a Property Status Change Request form, and forward it to RF Administration for approval (see Exhibit K).
- D. When a motor vehicle or motorized equipment is surplus the PCO will forward a NYS form CS-201, Report of Surplus motor Vehicles and Motorized equipment (see Exhibit L) to the EC to be completed and forwarded to the Office of General Services. (These items become part of a state wide auction.)

3. If equipment is surplus in excellent to fair condition, the PCO will:

- A. Notify the campus community to determine if another area on campus is interested in the property (suggested 30 day holding period) and arrange for property to be moved to surplus storage for retention until authorized to dispose/release it. The PCO will update the PCS record to reflect the location change if moved to another department.
- B. Should no other department on campus express an interest in the item, the PCO will change PCS inventory status code to 4 - surplus and update the condition code, if applicable. This initiates the SUNY/ OGS surplus process. (Note: this process can be used for equipment below \$5,000 by creating an asset record with PCS status of Surplus 4).
- C. The asset will remain on PCS for 60 days as available for inter-campus transfer. The transfer of vehicle and non-vehicle surplus equipment between state-operated campuses can take place directly between the releasing and receiving campus without System Administration or OGS approval.
- D. After 60 days if a transfer between campuses does not occur the OGS Surplus code will be programmatically updated to 1; the campus PCO will complete NYS Form CS-201, Report of Surplus Personal Property (see Exhibit P), and send it to OGS. OGS will make the item available to other State agencies (and will issue transfer authorization, if applicable) and/or will attempt to sell the property.

### **Surplus Disposal** – (cont'd)

E. If sold, once OGS receives complete payment they will issue written authorization to the buyer to pick up the item and send the PCO a copy of this authorization.

F. Once the item has been removed from campus, the PCO shall retire it from PCS and provide OGS with required documentation.

G. OGS may issue a Local Disposition Authorization (LDA) directly to the campus if it is unable to sell the surplus property. Retire asset using transaction type **8** and update status code to **S**, Campus Disposition.

For more information, visit the OGS website at: **WWW.OGS.STATE.NY.US**

4. If equipment is surplus in poor or scrap condition, the campus is authorized to dispose of equipment. Disposal can be done in the following manner:

A. Discard in the dumpster, unless equipment contains hazardous waste material which then must be recycled.

B. Recycle by bringing in certified vendors. Equipment with electronic components such as computers and monitors contain lead, silver, cadmium and other heavy metals (see Exhibit M).

C. Allow interested parties to permanently remove the surplus equipment from the campus with a copy of the Report of Surplus form and Equipment Removal form. **We strongly suggest that a payment is made at the Bursar's Office to the SUNY General Income Fund. The remover should keep a copy of the receipt in their records and forward a copy to the PCO** (see Exhibit N).

### 4. **Equipment Thefts** (Request for Removal of Accountability for Stolen equipment, form HSCB 004 F470 R1 (3/89) [see Exhibit E]).

Stolen equipment must be reported to the University Police Department, so that an attempt can be made to recover the item and identify and prosecute the thief. The Public Safety Officer will complete a NYS Incident Report form DCIS-3205-2 (3/93) [see Exhibit E1]. If the item is on the PCS inventory, it must be retired as stolen. In addition, the Public Safety Office must periodically report all stolen property to the Office of the State Controller (OSC). Therefore, this procedure must be followed to report all property thefts, regardless of whether or not the item is on the PCS.

(1) Call the Department of Public Safety (X 2626) and report the loss. Meet with the Safety Officer to supply details of the circumstances surrounding the loss and a description of the property.

(2) Complete a Removal Accountability for Stolen Equipment form (see Exhibit E). Retain a copy for your department records. Forward a copy to the Property Control Office (Box 82). Public Safety shall make these forms available at the time of reporting of theft by departments.

The Public Safety Office will report the loss to OSC and after receiving approval, Property Control will retire the asset.

### 5. **Loan/Removal of Property from Campus Buildings** (Equipment Removal form HSCB 006 R1 F509 (8/86) [see Exhibit F], and Status of Equipment on Loan, form DMC 005 R0 F470 (8/83) [see Exhibit H])

In cases where equipment will be temporarily transferred to another location, a transfer form need not be completed by the department. The Property Control Office will not post a location change

### **Loan/Removal – (cont'd)**

to the PCS. The item will be considered on loan and the Equipment Coordinator will be expected to make a note of the loan in the department's asset equipment list records and follow up to ensure the safe return of the equipment.

In cases where loans will be 6 months or more or where a loan is extended indefinitely, a transfer form should be submitted by the department to Property Control for posting to the PCS. In all cases, in order to prevent unauthorized removal of DMC property no item or equipment will be permitted to leave the premises without the proper authorization.

(1) Complete the DMC Equipment Removal Form as follows:

- Name of person removing equipment
- Date \_\_\_\_\_ Time \_\_\_\_\_
- Department, Building, and Room # where item was removed from
- Extension (phone) which can be called to verify
- Reason for removal
- Expected date of return
- Signature of Department Head
- Signature of remover
- Item description, manufacture and asset tag number

(2) When exiting from the building (with the property) present the Equipment Removal (all copies) to the Safety Officer on duty

2a. Officer completes "Removal" section and gives "Bearer" copy to person removing item(s).

2b. Officer submits University Police and PCO copies to headquarters (Public Safety Office). HQ forwards copy to the PCO.

(3) When bringing the property back into the building, present the "bearer" copy of the Equipment Removal form to the Safety Officer on duty.

3a. Officer completes "RETURN" section of bearer copy and retains copy and submits this to Headquarters

(4) University Police Department keeps a file of the Equipment Removal forms. On a monthly basis they will review the file and, for any items showing an expected date of return a month or more past, notify the Property Control Office. Property Control will send a Status of Equipment on Loan (see Exhibit H) to the appropriate location unit Equipment Coordinator.

(5) The Equipment Coordinator must contact the person who borrowed the equipment to ensure its return or revise the expected date of return. Complete the bottom portion of the Status of Equipment on Loan form, and return it to Property Control.

(6) If the loan has been extended indefinitely or the item permanently transferred to another unit, complete a transfer form and forward it to the Property Control Office. Cross the item off unit equipment lists.

### **Loan/Removal – (cont'd)**

**NOTE:** The Equipment Removal Form when signed by the Property Control Office acts as a work order for the movers or Hospital Environmental Services to transfer equipment between campus buildings.

6. **Bringing In/Removing Personal Property** (Personal Property Form, HSCB-008-F509-R0-(01/90) [see Exhibit G])

Any person bringing into a campus building equipment of significant value not belonging to Downstate Medical Center, the SUNY Research Foundation, or the Faculty Student Association must adhere to the following procedure to register the equipment with the Public Safety Department in order to be permitted to remove the item at a later date. This includes (but is not limited to) vendor demonstration or loaner equipment, personal property (such as radios, tape recorders, or cameras), and professional corporation property not intended to remain indefinitely at Downstate. Professional corporation property intended to remain on campus indefinitely need not be so registered; if it is not, however proof of ownership will be required for removal of the property at a later date.

The person bringing personal property into a campus building must complete a Personal Property form ((HSCB-008-F509-R0-(01/90) [see Exhibit G]) and present it to the Public Safety Officer on duty at the entrance

- (1) Complete the form as follows:
  - Name
  - Department (if DMC employee) or Company Name
  - Quantity
  - Item description, Manufacturer, Model and Serial Number
  - Destination-Room-Department
- (2) Sign the form in the Officer's presence.
- (3) Retain the bearer copy of the form
- (4) Present the bearer copy of the Personal Property form to the Officer on duty when removing the property from the building. Sign the form in the departure column, in the Officer's presence. The Officer will verify that the form original is on file in the University Police Office and then allow the person to exit with the property.

7. **How to Perform a Physical Inventory**

A current report of all assets listed on the PCS database under departmental account codes, will be sent out prior to a physical inventory project begin date. The Department Head, Administrator, or Equipment Coordinator involved in the physical inventory will review the report:

1. Place a check mark to the left of the asset number if the asset is located in the room designated on the report. Make any corrections to the asset's description, model, serial #, condition, status, or the departmental account can be made by crossing out the incorrect information and placing the correct information to the right of the incorrect information. The use of red ink is most helpful for these corrections.
2. Circle the asset number if the asset is listed on the report, but not located in the designated location.

If the room user, who should accompany the inventory team, knows the correct location, the correct location should be noted to the left of the circled asset number.

**Physical Inventory – (cont'd)**

3. At the bottom of the listing, add the asset number of any items found in the room (which has a DMC asset tag) which does not appear on the listing with a description of the asset and all the data listed in item number 1.

It is very important that the inventory sheets are clearly marked, since data input personnel will enter all numbers and letters exactly as they appear [e.g. Letter “O” versus numeral zero “0” and letter “S” versus numeral five “5”].

See Exhibit J for an example of the current PCS report being used and Exhibit K for examples of various asset tags used at DMC.

Each department is required to assist the PCO in completion of the physical inventory for their locations.

After a physical inventory is completed, the PCO will generate a report of Assets Not Found to the department Equipment Coordinator for review and follow up. The PCO will then input the finalized data from the inventory sheets and generate new asset inventory reports to the departments for their files.

## **I. HOW TO READ PHYSICAL ASSET TAG vs. PCS ASSET NUMBER**

1. The PCS asset tag number is alphanumeric with 10 digits.

CC S NNNNN XX

C = Campus Code (All DMC assets begin with 10 which stands for the campus code of 2810)

S = “S” for state assets, “4” for Research Assets or “0” for Faculty Student Association (FSA)

N = Asset tag number

X = “00” for State Asset, “R0” for Research Asset, or “FS” for FSA Assets

Exceptions: X = “0S” for State Asset – Software, “0L” for State Asset – License

N XX = “SR0” for Research Asset – Software, “LR0” for Research Asset – License  
BE004FNNNN asset tag number for Fixed Assets (Group 2). These assets are not entered into PCS and no physical tag is placed on the equipment.

### **EXAMPLES**

<b><u>Asset Type</u></b>	<b><u>Asset Number</u></b>
1. State Asset	10S6810400
2. Research Asset	10462650R0
3. FSA Asset	10000456FS
4. State Asset - Software	10S000010S
5. State Asset - License	10S000010L
6. Research Asset - Software	1000001SR0
7. Research Asset - License	1000001LR0
8. Fixed Asset	BE004F0912
8. Below threshold	Yellow Property of DMC tags

**Asset Tag – (Cont’d)**

Some older equipment or furniture may have older Asset tags. The tag will read 73-1311

10 = Campus Code

001311 = Asset Number

73 = Year of Registry

The asset number on the PCS report would be 1000131173. In this case, the asset number of 1131 converts to a 6 digit number of 001311.

It is generally easier in some cases to make sure that you look for the correct item description first, and then match either the asset number or serial number to be certain that you have found the correct asset.