

Equipment Inventory Responsibilities

Effective equipment inventory management requires active collaboration between departmental staff and Fixed Asset and Equipment Inventory Services (FAEIS).

Department Responsibilities

- The Department Head is responsible for all equipment assigned to the department. Departments must coordinate the inventory process with FAEIS and complete inventories within 60 days of the initial missing report, per Fixed Assets Policy 3950. Departments must locate at least 95% of the equipment by both value and quantity. These responsibilities should be incorporated into annual evaluations.
 - Notify FAEIS of areas that require departmental assistance or restricted access, including sensitive locations or experiments.
 - Ensure staff understand the inventory process and are available to assist in accessing equipment in all locations.
 - Review the inventory listing before the start of the inventory. Provide documentation for any equipment that has been surplus, traded in, returned, or associated with risk management claims.
 - Ensure all home authorizations are current. Home authorizations are valid if approved within one year from the start of the inventory process.
 - Inform FAEIS of any new purchases, donations, evaluation equipment, or personally owned items identified during the inventory.
 - Ensure equipment is visible and accessible to the inventory team, or provide staff support to locate items during the initial visit.
 - Equipment coordinators should accompany the inventory team. Notify coordinators in other buildings when inventory activities begin.
 - For equipment located outside Montgomery County, request completion of the Inventory Certification Form or provide clear photos showing equipment details and location.
 - Regularly run the missing equipment report (FZRFIMS) and search for those assets. Schedule follow-up visits with FAEIS when many items are located; if only a few are located, submit clear photos showing readable barcodes and asset information along with room and building identifiers.
 - Keep custodian information current.
 - After the physical inventory, continue working with FAEIS to resolve outstanding issues. Investigate items on the missing list promptly and certify final results within 60 days.
 - Department Heads must approve all write-offs within two weeks of receipt and provide a detailed justification.
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Inventory Team Responsibilities

- For departments that did not meet prior-year inventory requirements, schedule a pre-inventory meeting with the Department Head, equipment coordinator, and relevant staff to review the process, discuss locations, and outline expectations. Additional meetings will be scheduled upon request.
- Send monthly missing-equipment reports to Department Heads and quarterly status reports to senior management.
- Follow all departmental rules and protocols, including safety requirements related to personnel and equipment.
- Conduct thorough walkthroughs, scanning barcodes and verify or update information as needed.
- Retag equipment as appropriate.
- After all locations are visited, collect and process surplus forms, trade-in documentation, risk management paperwork, and other relevant materials.
- Email the missing-equipment list to coordinators within five business days of the initial walkthrough.
- Be available for follow-up visits and assist departments in completing these within 60 days.
- Prepare the Moveable Equipment Inventory Summary Report for departments meeting compliance standards and follow up on accuracy or completeness issues.