

Re: **Property Management Procedures**

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The College of Optometry is responsible for the proper use, maintenance and safekeeping of its state and federal property. All capital equipment, regardless of funding or acquisition source, is to be accounted for through the appropriate inventory records and maintained by Optometry's designated property manager, Marc Eaton, Manager and/or Mary Martinez and UH Property Management. Capital equipment is acquired through several sources including but not limited to:

- Purchase using federal, state, local, contracts and grant funding,
- Equipment loans from federal, state and private agencies,
- Federal and state agency surplus and
- Gifts
- IDEA Allocation

The Manager and Property Custodian will ensure proper control over and reporting of:

- Capital equipment acquisitions,
- Interdepartmental loans,
- Equipment transfers,
- Disposal of excess equipment and
- Annual inventory of all capital equipment

Employees must have completed proper documentation (PRP-2) for approval prior to moving equipment off-campus. Any employee who has university property at an off-campus location is responsible for that property and should consider providing insurance coverage under his or her own personal property insurance. The employee must reimburse the University should the property be lost, stolen, damaged or destroyed according to MAPP, SAM's and Texas Controller's directives. Any capital lost or stolen equipment must be reported to Property Custodian, UH Police and Houston Police Department if incident occurred off-campus.

## **PROCEDURES**

### **A. Acquisition of Capital Equipment**

1. Capital equipment is delivered to the Optometry Business Office, which is the receiving area for Optometry deliveries
2. The requestor is notified to pickup item(s), sign the packing slip for the Business Office vendor file.
3. Marc Eaton/Mary Martinez receives the tag(s) & Asset Tagging Form and can obtain information from Business Office regarding equipment location.
4. They may also have access to PeopleSoft to identify any additional information.
5. The item is located and tagged with a unique identification bar code number. Appropriate room changes are made on the Tagging Form.
6. Mr. Eaton/Ms. Martinez returns completed form to UH Property Management.
7. The data is entered into Optometry's inventory database which can be found in the "Business Office" server; "Inven, Bldg" folder; "Bldg Inventory" document. The inventory database is password protected.

### **B. Maintenance and Control Responsibilities**

1. Through proper management and control of property, the Optometry employees will ensure that:
  - Property is not loaned, traded, discarded, moved or cannibalized without completed documentation and prior approval of Property Custodian, Dean and UH Property Management.
  - Property is not defaced or damaged in any way

- Property is not returned to a vendor as a trade-in without approval of the Property Custodian and UH Property Management.
  - Obsolete and excess property is turned in to Property Custodian (and UH Property Management.)
  - Property within the College is tagged and listed in the College's annual inventory and
  - Any lost or stolen capital equipment must be reported to the Property Custodian and appropriate authorities.
2. Property Manager will ensure proper forms are initiated and completed to process any of the above-mentioned actions:

PRP 1-A	Authorization to Move or Transfer Furniture and Equipment (and Acknowledgment of Gift-In-Kind/Loan Deletion From Inventory
PRP 2	Request for Authority to Remove Equipment From Campus
PRP 7	Missing Inventory
PRP 8	Off-Campus Inventory
PRP 16	Transfer to Permanent Storage
PRP 16B	Transfer to Surplus Storage and Missing or Stolen Property Report for State Departments, Institutions, and Agencies
	Copy of Page from Optometry's Inventory Database
	Copy of PRP System Report of Listing of Capital Items
	Copy of PRP Tagging Form

### C. Annual Inventory

Optometry's Property Manager is required by state statute to conduct an annual inventory of all capital equipment. The College is required to provide a signed acknowledgment of the property in its possession. The physical inventory is conducted within University guidelines and designated deadlines. See MAPP, SAM and Survival Guide policy for further information and forms.

<http://www.uh.edu/mapp/03/030301.pdf>

<http://www.uh.edu/sam/3FiscalAffairs/3E2.pdf>

<http://www.uh.edu/af/survival/Finance/propmanResponsibilities.htm>