

Office Manager Manages Asset Inventory / Surplus Equipment SOP# 107

ELEVATOR & AMUSEMENT DEVICE BUREAU
North Carolina Department of Labor



STANDARD OPERATING PROCEDURE MANUAL

1. PURPOSE and SCOPE

1.1. Purpose

This SOP establishes the procedure that the Office Manager uses to conduct periodic inventories and manage surplus items. It is necessary for the bureau to track items in its possession, including office equipment, computers, phones, and others. This is done so that the Budget Office can track the depreciation of major items, so that the bureau can be assured that necessary items are available when needed, and so that items that are damaged or no longer of use can be disposed of or put into surplus. This procedure has the following goals:

- Send a Fixed Asset Inventory Report and Certification to the Budget Office annually;
- Track the number, type and users of cell phones and similar equipment;
- Keep bureau staff who need one equipped with a motor vehicle;
- Send unused items to state surplus.

1.2. Scope

This procedure contains the actions needed to:

- Conduct periodic inventories and report the results to the Budget Office;
- Acquire motor vehicles from the state motor pool and assign them to bureau staff;
- Send unneeded items to state surplus

Inventories are conducted for all items used by the bureau that cost more than \$1000.00 when new. Separate procedures are used for state vehicles, cell phones and all other items (e.g. desktop computers). Inventories are conducted quarterly. Reports are sent to Budget Office and the Budget Office annually.

1.3. Regulations

The following statutes, rules and/or codes must be followed while performing this SOP:

1.3.1. N/A

2. PERSONNEL RESPONSIBILITIES

The following is a list of each role who participates in the procedure and the overall responsibilities of each role.

Role	Responsibilities
Budget Office	<ul style="list-style-type: none"> • Annually, provide the bureau an Asset Inventory Control Form; • Annually, provide the bureau a list of all of its cell phones of record.
Office Manager	<ul style="list-style-type: none"> • Conduct an accurate physical inventory of bureau assets against the Asset Inventory Control Form provided by Budget Office; • Send a signed Fixed Asset Inventory Report and Certification to the Budget Office annually; • Compare current inventory of bureau cell phones against the list provided by the Budget Office; • Send an updated list of cell phone information to the Budget Office annually; • Request motor vehicles for bureau staff as needed; • Inform the State Motor Pool of changes in vehicle assignments.
Bureau Management	<ul style="list-style-type: none"> • Review and approve the Fixed Asset Inventory Report and Certification document.

3. HEALTH AND SAFETY ISSUES

The following health and safety issues may arise if this procedure is not followed correctly and in a timely manner. As available, related Health & Safety regulations and/or procedures are provided for each issue.

Potential Issue	Health & Safety Regulation / Procedure
N/A	

4. PROCEDURE

Case 1: Annual Physical Inventory (not cell phones)

4.1. Trigger

This procedure is triggered annually when Budget Office sends the bureau an Asset Inventory Control Form and an inventory spreadsheet.

4.2. Primary Procedure

- 4.2.1. Office Manager receives the Asset Inventory Control Form from Budget Office
- 4.2.2. Office Manager conducts a physical inventory of bureau equipment against the Asset Inventory Control Form
- 4.2.3. Each member of bureau staff checks the serial numbers of equipment (with original cost of at least \$1000.00) used by them, counts the number of items and reports back any changes to the Office Manager
- 4.2.4. Office Manager updates the Budget Office Excel spreadsheet with any items the bureau has surplus, discarded or added as new since the last report. (This information is maintained in a Surplus Equipment and Assets spreadsheet.)
- 4.2.5. Office Manager fills out the Fixed Asset Inventory Report and Certification document
- 4.2.6. Office Manager sends the Fixed Asset Inventory Report and Certification document to Bureau Management
- 4.2.7. Bureau Management reviews and signs the Fixed Asset Inventory Report and Certification document
- 4.2.8. Office Manager sends the approved Fixed Asset Inventory Report and Certification document and updated Excel spreadsheet to the Budget Office
- 4.2.9. End of procedure

Case 2: Inventory of cell phones

4.3. Trigger

These procedures are triggered annually.

4.4. Primary Procedure

This procedure is triggered annually when the Budget Office sends a list of all cell phones of record to the Office Manager for review and update.

- 4.4.1. Office Manager receives a list of all cell phones of record from the Budget Office
- 4.4.2. Office Manager compares most recent EADB cell phone inventory (maintained in a Bureau Cell Phones spreadsheet on an as needed basis) with the Budget Office list
- 4.4.3. Office Manager notes any changes in the Budget Office list (e.g. additions, deletions)
- 4.4.4. Office Manager returns the list to the Budget Office
- 4.4.5. End of procedure

Case 3: Management of state vehicles

4.5. Trigger

These procedures are triggered as described below.

4.6. Primary Procedure - Office Manager assigns a vehicle

This procedure is triggered whenever there is need to change vehicle assignments from the state motor pool.

- 4.6.1. Office Manager receives a request for a new vehicle assignment or for a change in vehicle assignment
- 4.6.2. Office Manager fills out a Permanent vehicle request form (motor fleet) when the bureau requires an additional vehicle
- 4.6.3. Office Manager fills out the Change request form (motor fleet) whenever the person assigned to a vehicle is changed
- 4.6.4. Office Manager submits the form(s) to Budget Director
- 4.6.5. Office Manager updates the Bureau Vehicles spreadsheet
- 4.6.6. Bureau Office Manager stores paper copies of the forms locally
- 4.6.7. End of procedure

Case 4: Management of surplus items

4.7. Trigger

This procedure is triggered when one or more items must be sent to State Surplus.

4.8. Primary Procedure

- 4.8.1. Office Manager assesses items that must be sent to State Surplus
- 4.8.2. Office Manager (User) logs into the NC State Surplus computer system
 - 4.8.2.1. Note: Contact NC State Surplus for authorization to use this system
- 4.8.3. System allows entry of new surplus items
- 4.8.4. User enters information for each item to be surplus, e.g. description, category, serial number, date and quantity.
- 4.8.5. User submits information for NC State Surplus approval
- 4.8.6. System saves data for State Surplus
- 4.8.7. State Surplus staff checks items
- 4.8.8. State Surplus contacts Office Manager to handle any discrepancies
- 4.8.9. State Surplus sends labels to Office Manager to place on surplus items
- 4.8.10. Office Manager places the labels on the surplus items
- 4.8.11. Office Manager can move the items to the warehouse by:
 - 4.8.11.1. Calling State Surplus for pickup

- 4.8.11.2. Coordinate pickup with another department
- 4.8.11.3. Transport items to NC State Surplus warehouse
- 4.8.12. Office Manager updates the local inventory spreadsheet
- 4.8.13. End of procedure

5. CUSTOMER SERVICE REQUIREMENTS

The following table lists the customer service requirements that must be satisfied for each Customer of the procedure.

Customer	Requirements
Budget Office	<ul style="list-style-type: none"> • Inventory lists are correct and timely; • Cell phone list is correct and timely.
User of state vehicle	<ul style="list-style-type: none"> • State vehicle is available when needed; • A loaner vehicle is available when needed.

6. DATA AND RECORD MANAGEMENT

6.1. Reports run as part of this procedure

- 6.1.1. N/A

6.2. Storage locations of saved materials

- 6.2.1. Fixed Asset Inventory Report and Certification

Document is stored in Bureau Office Manager local computer in the Asset Inventory-elevator folder. Filename format:

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- 6.2.2. Fixed Asset spreadsheet

Document is stored on Bureau Office Manager local computer in the Asset Inventory-elevator folder.

- 6.2.3. Asset Inventory Control Form

Document is stored on Bureau Office Manager local computer

- 6.2.4. EADB cell phone inventory spreadsheet

Document is stored on Bureau Office Manager local computer

- 6.2.5. Bureau Vehicles spreadsheet

Word document stored on Bureau Office Manager local computer

- 6.2.6. Permanent vehicle request form (motor fleet)

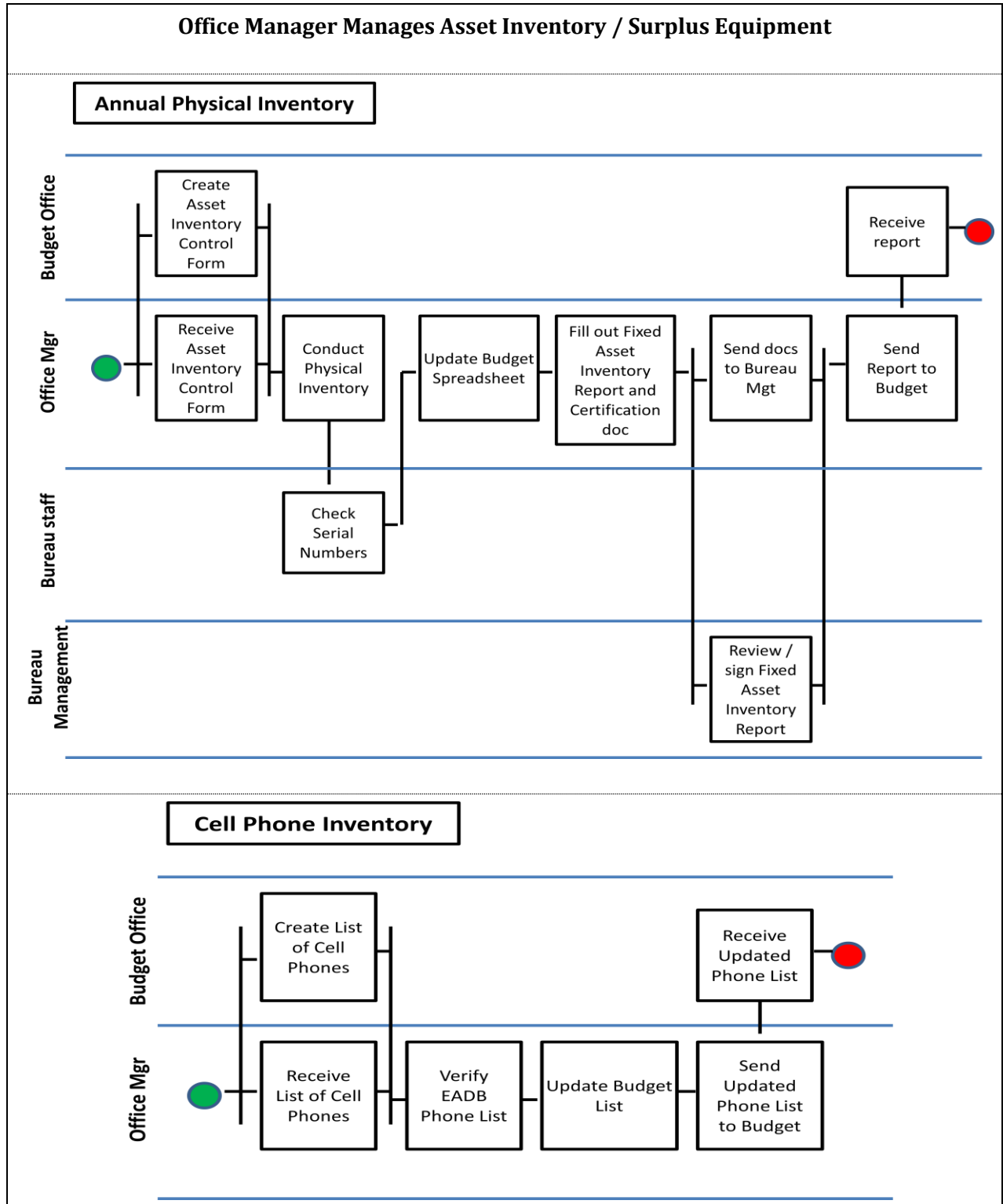
Document is stored in Bureau Office Manager local paper file storage

- 6.2.7. Change request form (motor fleet)

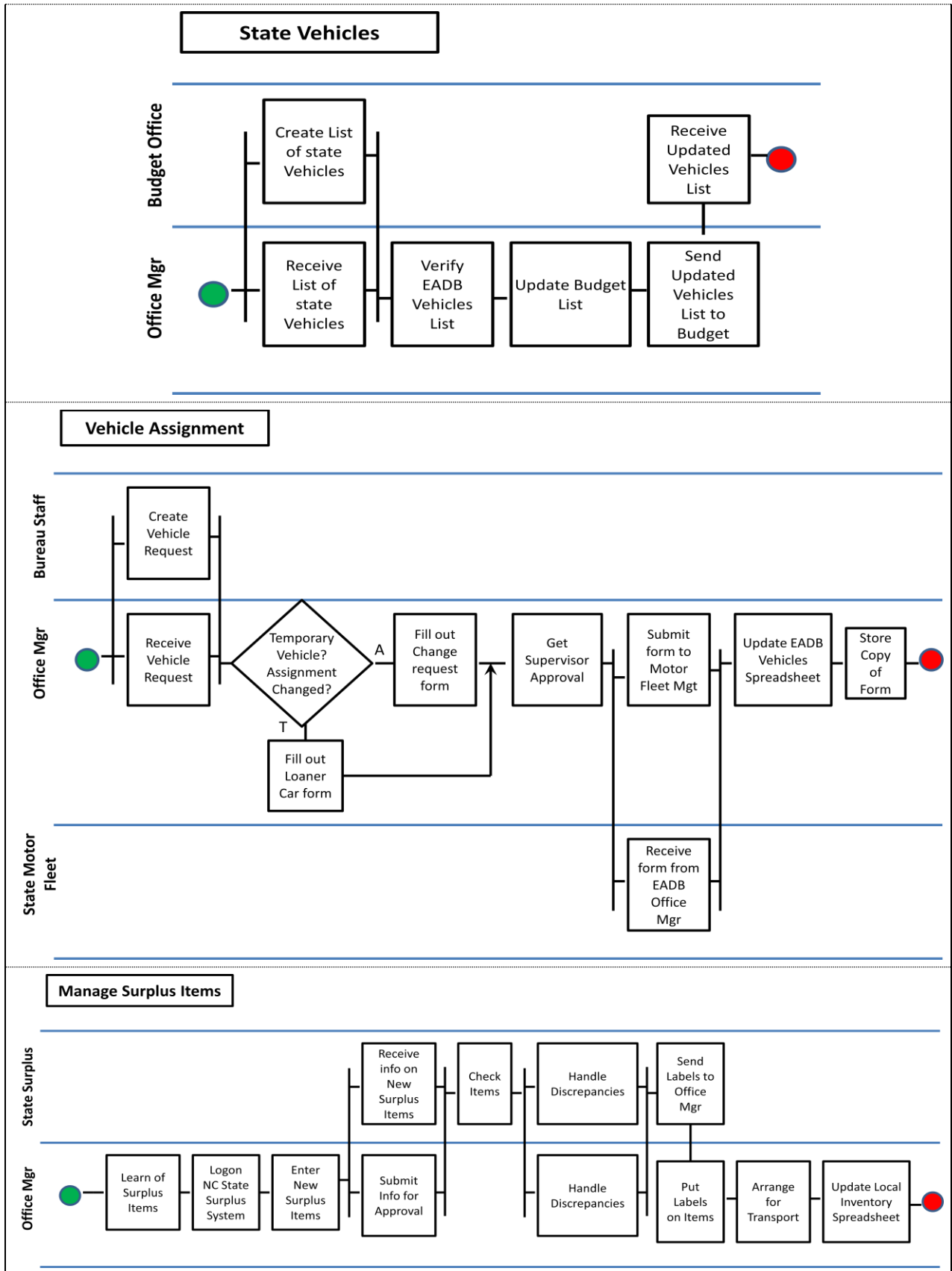
Document is stored in Bureau Office Manager local paper file storage

6.2.8. Loaner car form

Document is stored in Bureau Office Manager local paper file storage



Cell Phone Inventory



7. Glossary

A glossary of terms used in this SOP is available on the SOP website. It contains acronyms, abbreviations and special terms used in this document.