

## Proc 14608\_Reconciling EQUIPMENT INVENTORY (Facil)

### RECEIVING New Equipment

1. Delivery of new equipment shall be made to the desk of the General Manager.
2. Inspected deliveries shall be delivered to the desk of the Inventory Manager, along with purchase order information and/or packing slips. Essential information shall include item description and itemized cost.

### ADDING New Equipment to Inventory System

New Equipment "Types" in Facil should only be created with Management Approval. Prior to adding equipment, be sure to have ALL essential information on hand, including: manufacturer, model number, serial number, purchase date, and cost.

1. Click Equipment on the Facil homepage.
2. If the item is a *new* "type" of equipment that is not listed, scroll to the bottom of the Equipment Type list and enter the descriptions necessary to create a new type. When done click outside of the record and agree to save when prompted.
3. Select the Equipment Type from the list that you will be adding to and click on the "Equipment Units" tab.
4. Leave "Tag #" blank, as this will be auto-populated by Facil with an auto-incrementing ID number.
5. Enter all available information, leaving "Description" blank for this step.
6. After you have saved the record, go back and type the equipment name followed by C-"0000" replacing "0000" with the Tag # Facil assigns the equipment item.
7. Review the information and click outside of the record, agreeing to save if you are satisfied with your entry.
8. Using a blue paint pen, neatly write the Control Number on a visible *permanent* part of the equipment (e.g. C-1069).

### Changing Equipment STATUS or PHYSICAL LOCATION

1. Whenever ANY piece of non-reservable equipment is MOVED from one physical location to another (*including removal from the premises*), it is the responsibility of the person relocating the equipment to send an email to all staff identifying what item was moved and the reason it was moved.
2. The Inventory Manager shall be responsible for making sure the Equipment Status is updated in Facil according to the procedure described below.
3. From Equipment screen, search for the item by typing its ID number in "Locate Unit by Tag #"
4. If location is being changed, simply select the new location from the drop down, click off the record and agree to "Save".
5. If the item status needs to be changed, select from the drop down and please refer to the following:
6. Available – present; available for use  
Not Available – present; but NOT available for use

- Recycle – no longer present;  
Repair – currently being repaired; NOT available for use
7. Note that "Status Date" will change to reflect the date that the status was changed.
  8. A Physical Inventory of all equipment shall be performed on a quarterly basis (Mar, Jun, Sep, Dec) to ensure that all equipment is present in each location.

## **Handling DAMAGED EQUIPMENT**

### If reservable equipment is returned damaged,

1. The specific damage must be described on the Equipment Use Contract and a copy of the contract must be placed in the Producers Project File.
2. The Producer must be required to complete and sign a Producer Exception Report (located on the clipboard behind the Blue Forms) that must also be placed in the file.
3. The person receiving the equipment must send an email to all staff identifying the item and the nature of the damage, repair options (including links to replacement parts), and current location.
4. The Inventory Manager shall remain vigilant about following up until the failed equipment is repaired, replaced or removed from inventory.
5. The Inventory Manager shall be responsible for ensuring that the Status is updated in Facil and appropriate notes are recorded when the equipment is repaired and returned to service.

### If non-reservable equipment fails,

1. The person discovering the failure must send an email to all staff identifying the item and the nature of the failure, repair options (including links to replacement parts), and current location.
2. The Inventory Manager shall remain vigilant about following up until the failed equipment is repaired, replaced or removed from inventory.
3. The Inventory Manager shall be responsible for ensuring that the Status is updated in Facil and appropriate notes are recorded when the equipment is repaired and returned to service.

## **REMOVING Old Equipment**

1. From the EQUIPMENT screen, search for the piece of equipment in the "Locate Unit by Tag #"
2. Once viewing the item, change the status from "Available" to "Recycled" and change the Location from the item's current location to "Gone".
3. After saving the record, be sure the item is still selected and click on "Move Unit", select "OBSOLETE."