

Policy: Property Management – Inventories

Revision	0
Effective Date	03/04/19
Management System	Property and Infrastructure
Owner	Property and Infrastructure Management System Owner
Review Cycle	Every 3 years

Inventories for tracking assets

1. Purpose

The purpose of this policy is to describe FNAL's government-owned personal property inventories and audits in accordance with 41 CFR 109-1.5110.

2. Scope / Applicability

This policy applies to all employees who are custodians of Fermilab personal property and all personnel and operations involved with carrying out personal property inventories.

3. Policy

3.1. Physical Inventories

FNAL conducts physical inventories which entail visual verification (hands-on) of each property item tracked in Fermilab's computerized asset management system.

3.1.1. Physical inventories are the most certain way to assure accountable property is present and accounted for, utilized, and available.

3.1.1.1. Some property, such as High Risk Personal Property and Precious Metals, have additional regulatory requirements, all of which must be adhered to.

3.1.1.2. For assets unable to be physically inventoried due to loss, FNAL - ESH&Q Security Department completes a security report.

3.1.2. FNAL conducts physical inventories with the frequency required for each asset category in accordance with 41 CFR 109-1.5110.

3.1.3. FNAL commences inventories as early in the fiscal year as possible to ensure completion before fiscal year end.

3.1.4. FNAL tracks completed inventories in Fermilab's computerized asset management tracking system.

3.2. Results Sent to Fermilab Site Office

Results of completed inventories are sent to the Fermilab site office and the Organizational Property Management Officer (OPMO) within 60 days of completion of the inventory.

4. Responsibilities

- 4.1. **The Property and Infrastructure Management System Owner** approves this policy, identifying necessary resources and overseeing consistent laboratory compliance.
- 4.2. **The FESS-Logistics and Property Control Department Head** is responsible for implementing and managing changes to this policy by assigning appropriate resources.
- 4.3. **Laboratory Custodians, Supervisors of Custodians, ESH&Q Security Department and FESS Logistics and Property Control** are responsible for creating inventory campaigns and documenting results in computerized asset management system.

5. Definitions

N/A

6. Resources / Supporting Documents

- 6.1. **Desk procedure:** Required steps for conducting an inventory
- 6.2. **Desk procedure:** Creating campaigns in computerized asset management system
- 6.3. **Desk procedure:** Creating valid resolutions in computerized asset management system
- 6.4. **Regulation:** 41 CFR 109-1.5110, edition 9/14/2016

7. Revision History

Version Number	Date	Author	Change Summary
0	03/04/19	Jack Kelly	First Issuance

8. Approvals

Title	Name	Electronic Signature
FESS Logistics and Property Control Head	Jack Kelly	Jack Kelly, UID:jkelly <small>Digitally signed by Jack Kelly, UID:jkelly Date: 2019.03.05 09:26:05 -06'00'</small>
Property and Infrastructure Management System Owner	Karen Kosky	Karen Kosky, UID:kkosky <small>Digitally signed by Karen Kosky, UID:kkosky Date: 2019.04.03 06:00:23 -05'00'</small>