



LBLN Property Management Procedure Inventory

Owner

Policy - Property Management - Property Manager

Procedure - Property Management - Property Manager

Process - Property Management - Inventory Manager

Overview of the Process

Lawrence Berkeley National Laboratory (LBLN) is committed to maintaining a property management system that results in the efficient management of property entrusted to its care.

The general concept of property management at the Laboratory is to assign accountability for property to the divisions, the line management, and the custodian using it.

Personal property accountability includes responsibilities for such tasks as presenting personal property for identification and tagging, ensuring the assets are on the property record and properly assigned, securing and maintaining records relating to the assets, tracking the movement of assets, recording changes in physical condition, and conducting physical inventories.

Regulations:

- Department of Energy Order 580.1, CRD, Section 2.f.(1)-(3), Physical Inventory Methods
- LBNL Property Management Yearly Inventory Plan
- LBNL Personal Property Policy Manual Section 6.0 Property Inventory and Reconciliation
 - <http://www.lbl.gov/Workplace/CFO/assets/docs/pro/prty/PropertyManual.pdf>

Definitions:

- "Equipment" - is any item of personal property having a unit acquisition cost of \$ 5,000 or more and having the potential for maintaining its integrity (i.e. not expendable due to use) as an item. Equipment may also be a component of a larger piece of equipment when the component substantially retains its original physical appearance.
- "Sensitive Property" - is defined as property, regardless of value, that requires special control and accountability because of susceptibility to unusual rates of loss, theft, or misuse, or due to national security and export control considerations. See Sensitive Item List on the Property Management's website:
 - <http://www.lbl.gov/Workplace/CFO/assets/docs/pro/prty/SensitivePropertyList.pdf>
- Inventory Campaign – The specific asset category that will be part of the yearly inventory i.e., laptop computers, all asset greater than one million dollars, etc.
- Wall-To-Wall Inventory – inventory campaign where all the active assets in Sunflower must be accounted for.
- Statistical Sample Inventory – inventory campaign where a valid statistical sampling process is employed as an alternative to 100 % or wall-to-wall inventory.

Roles:

- Custodian – Caretaker for all assets assigned to them
- Divisional Property Representatives – Conducts divisional inventory in accordance with the approved yearly inventory plan
- Divisional Business Manager – Provides support to Property Representatives
- Facilities – Conducts Stores inventory



LBL Property Management Procedure Inventory

- Property Management Group – Develops the internal policy and procedures necessary to implement the Department of Energy’s policy regarding inventory
- Inventory Manager – Oversees inventory process

Responsibilities:

Requestor/Custodian:

- Maintain accountability of all assets assigned to them
- Be able to produce asset during inventory

Divisional Property Representatives:

- Conduct physical inventory during the prescribed inventory time period
 - locate and scan assets
- Attend inventory related meetings
- Submit completed inventory affidavit for asset(s) that could not be scanned
 - obtain picture and signatures
- Submit requests for asset to be retagged
- Submit completed Property Asset Retirement Form (see Retirement of Personal Property Procedure for use of form) for all assets “Unaccounted for During Inventory”

Divisional Business Manager:

- Provide support to their property representative
- Provide information to their upper management personnel

Facilities Property Representative (Stores Inventory):

- Conduct Stores inventory during the prescribed inventory time period
- Submit completed Stores final inventory report to Inventory Manager

Property Management:

- Conduct precious metals inventory during the prescribed inventory time period
- Conduct controlled substances inventory during the prescribed inventory time period
- Process all retag requests

Inventory Manager:

- Develop and maintain LBL yearly inventory plan
- Negotiate and submit LBL yearly inventory plan to BSO for review
- Oversee all aspects of the yearly inventory process
- Approves and processes all inventory affidavits

Divisional Inventory Procedure:

Yearly Inventory Plan

Inventory Manger

- Negotiate with BSO what types and categories of property will be part of the yearly inventory campaign
 - Wall-To-Wall inventory will include all active assets in Sunflower
 - Statistical Sample inventory will include a random sample of active assets in Sunflower
 - High risk (always 100%)
 - Precious Metals (always 100%)
 - Controlled Substances (always 100%)
 - Stores (Facilities) (always 100%)



LBLN Property Management Procedure

Inventory

- Use either EZ Quant or Sunflower statistical sampling programs to select the assets that will be part of the statistical sample inventory
- Submit negotiated LBL yearly inventory plan to BSO for review by November 1st of that year
- Inventory is executed in accordance with the Annual Inventory Plan

Inventory Preparation

Inventory Manger

- Develop, schedule and train property representatives. Training to include:
 - review yearly inventory plan
 - inventory schedule overview
 - barcode reader operation
 - Scanned data upload to Sunflower
 - Selecting, running and interpreting Sunflower inventory reports
 - Safety
- Develop and submit inventory communication plan. Plan to include:
 - Series of articles announcing the pending inventory to the Laboratory's population
 - Articles to be submitted to "Today at Berkeley Lab". Articles will be submitted 60 and 30 days prior to the inventory
 - Articles to include:
 - inventory schedule
 - what is on the inventory
 - Divisional contacts
- Communicate inventory plan to Divisional Managers, Divisional Property Representatives and Property Management

Barcode Reader Perpetration

Inventory Manager

- Contact each property representative and assure that barcode reader is functioning properly
- Update barcode reader software as needed

Divisional Property Representatives

- Test barcode reader to assure that it is working properly by performing practice scans and uploads to Sunflower

Sunflower Setup

Inventory Manager

- Create inventory campaign (review) in Sunflower
 - Defines parameters within which the inventory will be conducted
- Define inventory baseline assets
- Create valid resolutions
- Freeze inventory baseline
- Distribute selected inventory assets spreadsheets to Divisional Business Managers and Property Representatives



LBLN Property Management Procedure

Inventory

Inventory Period

Divisional Property Representatives

- Conduct physical inventory during the prescribed inventory time period
 - locate and scan assets (scanning is the preferred method)
- Submit completed inventory affidavit for asset(s) that could not be scanned
 - obtain picture and signatures
- Submit requests for assets to be retagged
- Submit completed Property Asset Retirement Form (see Retirement of Personal Property Procedure for use of form) for all assets "Unaccounted for During Inventory"

Inventory Manager

- Process Resolution Interface Record asrv0040 in Sunflower
- Update daily inventory status spreadsheet
- Distribute weekly inventory status spreadsheet every Monday during inventory

Validation

Inventory Manager

- The inventory validation process, sample size, and final report will be determined in coordination with the Site Office Contracting Officer
- A statistical sample will be drawn from the original inventory population of assets that were successfully scanned during the inventory
- Contact BSO to invite participation in the validation process
- Set up appointments to physically view assets
- Verifies assets DOE# and location
- A statistical sample will be drawn from the original inventory population of assets that were inventoried via the Inventory Affidavits
- Set up appointment for BSO to review inventory affidavits
- BSO may elect to verify inventory affidavits have the proper justification

Final Report

Inventory manager

- Will be responsible for reporting inventory results to
 - Senior Laboratory Management
 - BSO
 - Security
 - Divisional Business Managers
 - Divisional Property Representatives

Stores Inventory Procedure:

Yearly Inventory Plan

See divisional inventory procedure

Inventory Preparation

Inventory Period

- Stores inventory will begin on October 1st of each year
- Inventory Specialist gives Sr. Material Specialist (Storekeeper) a report of materials to be inventoried
- Storekeeper flags area to be counted and begins holding issues and receipts
- Storekeeper counts inventory.



LBNL Property Management Procedure Inventory

- Issues are recorded on Stores Order Form and retained in designated location for post inventory action
- Hold receipts (inspection ok)
- Counts are entered using Scanner Gun, when finished with area designated for counts, Storekeeper notifies Inventory Specialist
- Count details recorded in Maximo from Scanner Gun
- Items requiring recount are given to Storekeeper by Inventory Specialist that did not enter first counts, and second counts are entered by second Storekeeper
- Discrepancy noted on report
- Second count details recorded in Maximo from Scanner Gun
- Storekeepers notified that population is released
- Held issues, returns, receipts and bin-to-bin transfers completed
- Writes and submits final Stores Inventory report to Inventory Manager in accordance with the yearly plan

Validation

There is no formal validation of the Stores inventory, however, BSO may elect to validate

Final Report

Incorporated into the inventory final report

Precious Metals Inventory Procedure:

See Precious Metals Inventory procedure

Controlled Substances Inventory Procedure:

See Controlled Substances Inventory procedure

Forms:

Inventory Affidavit

- Property Management website: http://www.lbl.gov/Workplace/CFO/pro/property/prty_forms.html
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Reports:

Title:	Inventory Status Spreadsheet
Information Displayed:	Inventory stats
Purpose of the report:	Weekly update during the inventory
Recipient(s):	Business Managers, Property Representatives, Property Core Group
Frequency:	Distribute every Monday to Divisional Business Managers, Divisional Property Representatives and Property Management during the inventory period

Title:	Executive Review Resolution Summary ASRV6050 report
Information Displayed:	Inventory stats
Purpose of the report:	Weekly update during the inventory
Recipient(s):	Property Representatives
Frequency:	When needed



LBLN Property Management Procedure
Inventory

Title:	Review Campaign Base Assets ASRV6010 report
Information Displayed:	Open inventory assets
Purpose of the report:	Shows the details of the review campaign base assets by resolution type (e.g. open, barcode scan and barcode key) for a selected review campaign
Recipient(s):	Property Representatives
Frequency:	When needed