



LBL Property Management Procedure

Property Pass

Owner

Policy - Property Management – Property Manager
Procedure - Property Management – Property Manager
Process – Division Property Representatives

Overview of the Process

Lawrence Berkeley National Laboratory (LBNL) 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. Appropriate control techniques must be used to minimize waste and to prevent loss, theft, unauthorized removal, and abuse of administratively controlled items. One of these controls is the Property pass.

On occasions, custodians will need to take assets assigned to them offsite; such as, telecommuting, travel, conference, collaboration, etc. In these situations, a property pass will be assigned to the custodian giving them permission to remove the asset from LBNL.

*Note – Cell phones, radio pagers and personal data assistance will not require a property pass. All other assets will require a property pass.

Regulations:

- Department of Energy Order 580.1, CRD, Section 2.j.(2)(d), Administratively Controlled Items,
- LBNL Personal Property Policy Manual (10/01/07), Section 12.0.1., Property Removal
 - <http://www.lbl.gov/Workplace/CFO/assets/docs/pro/prty/PropertyManual.pdf>

Definitions:

Not applicable

Roles:

- Custodian - Caretaker for all assets assigned to them
- Property Representatives – Oversee property pass program for their respective division
- Property Management - Develops the internal policy and procedures necessary to implement the Department of Energy's policy on controlling property

Responsibilities:

Custodian:

- Obtains the Property Pass form from their Property Representative and fills it out completely
- Signs Property Pass form
- Obtains signature from their supervisor
- Submits completed Property Pass to their Property Representative
- Returns the asset in the same or similar condition, normal wear and tear permitted, as the asset was in when the property pass was approved
- Fully responsible for the use, care and protection of the asset while offsite
- Uses the asset solely for DOE sanctioned work
- Provides signed inventory affidavit and two photos of the asset when requested
- Will return asset to LBNL when requested by their division or Property Management



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Property Representatives:

- Provides support to the requester in preparing the Property Pass form
- Reviews the Property pass to ensure all required information has been completed
- Obtains concurring signature from their Division authorizer
- Assigns unique tracking number
- Provides custodian a copy of the signed Property Pass form and a wallet sized Property Pass
- Indicates in Sunflower that asset is on a Property Pass
- Reviews property passes at least once a year

Procedure:

- The custodian obtains the Property Pass form from their Property Representative and fills it out completely (guests can not be assigned a property pass)
- The custodian signs Property Pass form
- The custodian obtains signature from their supervisor
- The custodian submits the completed Property Pass form to their Property Representative
- Property Representative reviews for completeness
- Property Representative forwards Property Pass to division authorizer for signature
- Property Representative forwards a copy and a wallet sized property pass to the custodian
- Property Representative retains original for their files
- Property Representative updates Sunflower indicating asset is on a Property Pass
- Property Representative will request custodian to submit an inventory affidavit and two photos of the asset during inventory period
- Custodian will return asset to LBNL when Property Pass has expired
- Custodian will inform Property Representative that the asset(s) have been returned to LBNL
- Property Representative updates Sunflower indicating asset has been returned to LBNL

Forms:

Property Pass Form

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

Reports:

Not Applicable