UC San Diego
Policy & Procedure Manual

INVENTORY
Section: 522-2
Effective: 10/26/1992
Supersedes: 08/03/1981
Review Date: TBD
Issuance Date: 10/26/1992
Issuing Office: CAMS (Campus Asset Management System)

EQUIPMENT SCREENING

I.   REFERENCES

    A.   Business and Finance Bulletin

        BUS-29   Equipment Screening, Section C Part III, 12/15/89

II.   POLICY

The University's policy on the acquisition of equipment is that all items of equipment with a value of $10,000 or more must be screened against all available UCSD assets prior to purchase. This policy applies regardless of funding source.

III.   PROCEDURE

    A.   Departmental Screening and Certification

        1.   The screening of proposed equipment purchases between $1,000 and $9,999 has been discontinued. However in the interest of prudent economics, Principal Investigators and departmental personnel are encouraged to continue informal screening for assets to preclude redundant purchases.

        2.   Departments are no longer required to initiate screening of equipment with a value of $10,000 or more. This applies to both electronic and manual requisitioning. Purchasing and Equipment Management will fulfill mandatory screening requirements.

    B.   Purchasing Division

        1.   Equipment purchases with a value of $10,000 or more require screening, except for components of a fabrication. Purchasing will notify Equipment Management via electronic mail of *Purchase Orders* requiring screening.

        2.   When notified by Equipment Management that a candidate item is available, Purchasing will cancel procurement action.

    C.   Equipment Management

        1.   Upon receipt of electronic mail from Purchasing, requesting screening, Equipment Management will initiate an *Equipment Screening Certification*, *Exhibit A*. Required data will be obtained via IFIS screens.

        2.   Equipment Management will screen all proposed equipment purchases with a value of $10,000 or more against available UCSD assets.

        3.   In the event the screening action identifies potentially available candidate item(s),

Equipment Management will contact the cognizant equipment custodian(s) and determine the availability of the item(s).

4. If the candidate item(s) are not available to the ordering department, Equipment Management will annotate the *Equipment Screening Certification Over $10,000*, *Exhibit A*, form indicating 1) the candidate item, 2) the reason it is not available.

5. When candidate items are available, Equipment Management shall coordinate communications between the requestor and the custodian in order to assure the candidate item will satisfy the requirement. Where available assets fulfill the need, Equipment Management shall notify the Buyer of the cancelled requirement. Where the candidate item will not fulfill the need, Equipment Management shall annotate the Certification form, identifying the candidate item and the reason for non-acceptability.

6. Equipment Management will make notation on the IFIS "RECFIXED" screen that screening has been accomplished, and file the certification which is subject to audit.

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EXHIBIT A

EQUIPMENT SCREENING CERTIFICATION
EQUIPMENT MANAGEMENT - ITEMS OVER $10,000
(Ref. PPM 522-2)

Purchase Order No. _____ Date_____

Contract or Grant No. (If Applicable)_____

UCSD Department Contact _____ Ext. _____

1. Equipment Description

_____

_____

_____

2. Approximate Value _____

3. Manufacturer & Model No. (If Applicable) _____

4. Line Item Identification in Proposal, Contract, Grant (If Applicable)

    Page _____ Item No. _____

EQUIPMENT MANAGEMENT
ITEMS OVER $10,000

The above described item of equipment has been screened against campus equipment master file.

    ( ) No similar of like items were identified
    ( ) The below listed similar or like items were identified but not available for the stated reasons:

1. UCID _____Description_____

    Explanation _____

2. UCID _____Description_____

Explanation _____

3. UCID _____Description_____

Explanation _____
                        (If more space is needed, use back of form)

                                        _____
                                        Certification
                                        Equipment Management