# UNIVERSITY OF DAYTON

AND

# UNIVERSITY OF DAYTON RESEARCH INSTITUTE

Property Procedures

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Property Procedures

Exhibits

A. DD Form 1342 – DoD Property Record
B. Notice of Government-Project Constructed Property
C. Notice of Industry-Project Constructed Property
D. Notice of UDRI Owned-Project Constructed Property
E. Equipment Change Form
F. Confirmation of Receipt of Government Property
G. Property Loan Release/Receipt Document
H. Report of Loss, Damage, Destruction
I. Shipping Order/Return Authorization Form
J. Utilization and Maintenance Log
1. GENERAL

The procedures in this manual have been implemented by the University of Dayton (UD) and the University of Dayton Research Institute (UDRI) for all accountable equipment. Accountable equipment includes Government-furnished and contractor-acquired property and University-acquired articles. Equipment is a tangible item that is functionally complete for its intended purpose, has an acquisition cost of $5,000 or more per unit, is non-expendable, has a useful life of more than 1 year, and does not ordinarily lose its identity or become a component part of another article when put into use. (FAR 45.101 and Title 2 Subtitle A Chapter II, Part 200, Subpart A §200.33).

1.1 GOVERNMENT PROPERTY

When the Federal Government contracts with UD or provides grants of Federal funds, we must maintain control over all Government property in accordance with Federal Acquisition Regulations and supplemental regulations as required by individual agencies (FAR 45.104, 45.105, 45.106, 45.107, 45.502).

1.2 LIABILITY

UD may be liable for shortages, loss, damages or destruction of Government property in its possession (FAR 45.104).

1.3 PROPERTY IN POSSESSION OF SUBCONTRACTORS

The Property Administrator (PA) is responsible for overseeing the use of Government property in the possession of subcontractors to ensure conformance to Federal Acquisition Regulations (FAR 45.104, 45.502).

1.4 SYSTEM AUDITS

UD will cooperate in Government audits of its Property Records Management System and make records and correspondence available upon request (FAR 45.105).

1.5 DEPRECIATION AND USE ALLOWANCE

Use allowance for equipment is in accordance with Title 2 Subtitle A Chapter II, Part 200, Subpart E §200.46.
2. ADMINISTRATIVE RESPONSIBILITIES

The Director, Research Procurement & Property Management (DRPPM) and the Property Administrator (PA) assess University property policies and procedures annually. The PA and DRPPM discuss the state of property system(s), resources, and processes as needed in the interim periods. The outputs become action items, improvement opportunities or long term goals. The Property Records Office and inventory records are subject to Financial Statement Audits, A-133 audits by the University’s external audit firm and Property Control System Analysis (PCSA) by Government agencies.

2.1 PROPERTY ADMINISTRATOR (PA)

The PA is responsible for supervising all property and its authorized use. The PA is also responsible for creating and maintaining records, identifying property, and submitting such reports as may be requested and required by the University of Dayton (UD), University of Dayton Research Institute (UDRI), or agencies that sponsor property acquisition (FAR 45.103, 45.105, 45.502).

The PA also must be aware of the insertion of applicable property clauses in prime contracts and subcontracts (FAR 45.107).

Responsibility for all property transactions rests with the PA. No actions can be taken regarding property without advance authorization of the PA or delegate.

2.2 PROPERTY ADMINISTRATOR (PA) AND ADMINISTRATIVE COORDINATOR (AC)

The PA and the AC are members of the UDRI Purchasing/Property Records Management Office staff.

The PA and AC are responsible for creating and maintaining property records, clearing payment of equipment invoices for both UD and UDRI, and for affixing suitable identification to equipment.

2.3 UDRI SUPERVISORS, ACADEMIC DEANS, DEPARTMENT CHAIRS AND PROGRAM DIRECTORS (aka ORGANIZATION MANAGERS)

The individual responsible for each laboratory, office, and /or related area shall see that all property in his/her area is adequately protected from theft or abuse and that operating personnel are instructed in the proper use of equipment (FAR 45.104).

2.4 EQUIPMENT CUSTODIANS (ECs)

One person in each laboratory, office, and/or related area is identified by Property Records staff, the appropriate UD supervisor, academic dean, department chair, or program director as an EC to assist in property control. These individuals are identified on each applicable property record.
3. ACQUISITION PROCESS

3.1 PURCHASE REQUEST (PR)

To begin the capital equipment acquisition process, a properly completed purchase request (PR) must be submitted.

3.2 PRE-ACQUISITION SCREENING/CONSENT

Prior to acquisition, all property/equipment in excess of $100,000 is subject to advance screening by the University of Dayton (UD) and/or University of Dayton Research Institute (UDRI) Purchasing; i.e. a search of existing UD property to prevent duplication.

Because individual agencies/sponsors have different screening requirements for procurement of accountable equipment, each sponsor’s regulations must be considered. Some equipment acquisitions are subject to advance screening and Consent to Purchase from the Administrative Contracting Officer (ACO). See UDRI Purchasing Procedures.

3.3 PURCHASE ORDERS/RECEIPT OF PROPERTY

Only the Director, Research Procurement & Property Management (DRPPM) or delegate is authorized to obligate the Research Institute for UDRI activated purchases. Property shipments are to be directed to the person or location designated on the purchase request. Property correspondence is to be directed to:

Property Administrator
University of Dayton Research Institute
300 College Park
Dayton, Ohio 45469-7755

The PA will furnish records for contractor-acquired Government property when requested. Receipts for Government-furnished property will be submitted to the ACO immediately upon receipt. Receipts for other sponsor furnished property will be provided in accordance with contract terms or as requested.
4.  PROPERTY CONTROL

4.1  RECEIVING AND INSPECTION

Incoming orders are delivered to the University of Dayton's (UD’s) Central Receiving (CR) area and are later distributed to the person or location designated on the purchase order. CR personnel will perform a limited inspection of the materials/property received. This inspection will include a check for evidence of outward damage. CR does NOT unpack complex or delicate orders for close examination or to count large quantities of items.

If there is observable in-transit damage to an order, all paperwork and packing materials are saved so a damage claim can be filed. Claims for in-transit damage must be filed with the carrier within 10 days following delivery.

After processing, item(s) are delivered to the order initiator. Large shipments or heavy items may be delivered directly to the laboratory or work area where they will be used/installed (FAR 52.247-14). The initiator/requisitioner is responsible for opening and inspecting orders immediately upon delivery. In the event an order has been received but is incorrect, the item(s) received do not function properly, or the item(s) do not meet specifications it may be desirable to withhold payment of the invoice. Both warranties and returns may be affected by delay. The Accounts Payable Office should be notified immediately of problems with an order.

If shortages, incorrect or inoperative item(s) are evident, return procedures should be initiated immediately (FAR 52.247-14). See Sections 5 and 6 in this manual; University of Dayton Research Institute (UDRI) Purchasing Procedures, Section 9.4 and 9.5.

4.2  MISDIRECTED SHIPMENTS

If a shipment of Government property is misdirected to UD, the recipient shall, upon authorization of the Property Administrator (PA) or delegate, submit the following information to the ACO, together with a request for return funding authorization:

Shipping document or bill of lading
Origin of shipment
Content per shipping document
Location
Disposition
A copy of the above documentation shall be filed in the Property Records Management Office (PRMO) (FAR 52.245-1(b)(1)).

4.3  INVOICES

All invoices should be addressed to the Accounts Payable Office. Invoices for coded capital equipment are routed to the PRMO via the eProcurement system after the initiator/requisitioner has approved payment. This approval is contingent upon examination and/or installation by the initiator/requisitioner and proves the item(s) to be as ordered, in good working condition and satisfactory to the purpose for which ordered.
4.4 PROPERTY RECORDS

Records are maintained for all UD accountable property in accordance with UD policy, Federal Acquisition Regulations (FAR) and Defense Federal Acquisition Regulations (DFARS).

A. Property Records Management Database

All active property records are maintained electronically. A separate property record is prepared for each item of UD accountable property from information contained on the invoice or other transfer documentation and entered in the property records management database. A distinction is made between contractor-acquired and Government-furnished equipment.

B. Organizations (Org)/Location Code

Org codes are assigned to each department. Additionally, a unique location code is assigned to each laboratory, office, and/or related area to facilitate property control. An individual at each location is designated Equipment Custodian (EC) to maintain limited property records and serve as primary source for information regarding current status of equipment assigned to a specific location. It is possible that more than one location may be assigned to a particular EC. The PRMO provides an inventory list by Org to each Org Financial Manager (OFM) annually, or as requested, as a control aid.

C. References/Audit Trail

Each property record in the property records database contains information required by the Federal Acquisition Regulation plus other information that is of value. The initial property record for contractor-acquired equipment references the contract from which funds were utilized and the PO number. The initial property record for Government-furnished equipment references the contract under which the equipment was obtained; however, “GFE” is entered instead of a PO number. Upon transfer to other contract(s) this information is updated to reflect the contract under which equipment is currently accountable. An audit trail can be generated listing all actions affecting each item of property on record.

D. Government Furnished/Contractor Acquired Equipment

For all accountable items, shipping/transfer documents are confirmed and items verified. After initiation of the property record, the shipping/transfer document for Government furnished property is placed in the appropriate contract correspondence file.

E. Government Furnished/Contractor Acquired Materials

Materials furnished by the Government or acquired by UD are documented by evidence of acquisition and receipt (issue/receipt document or packing slip). See Section 4.1.

F. Materials Consumption

Government furnished/contractor acquired materials are issued directly to the initiator/user so as to be considered consumed under the contract.
G. Lab-Constructed Equipment

Property records are not maintained for parts or components of lab-constructed equipment/systems regardless of unit cost. When the construction/development is completed, and upon receipt of a Notice of Constructed Property (Exhibits B, C, and D) from the responsible person, the PRMO assumes accountability of the equipment/system based on the entire price. Notification of completion of a lab-constructed system is made to the ACO as necessary (FAR 15.407-2).

4.5 IDENTIFICATION

The PRMO uses bar code tags, black and red dymo label tags, and other sponsor or subcontractor tracking numbers to identify and track equipment. The PRMO also has a supply of tags showing UD or UDRI ownership of non-accountable equipment available upon request. These tags are suggested for use on pilferable items.

A. Government Furnished/Contractor Acquired Equipment

Accountable items of Government-owned property are tagged with a UD bar code and an additional tag to indicate ownership. This additional tag is used as a control number. A black dymo label control number tag identifies the Government sponsor; e.g., USAF0023-0003. If a sponsor or subcontractor identification tag is affixed to the item, this may be used instead of a UD assigned control number. Government EMAS labels are an example of sponsor identification numbers.

B. UD Acquired Equipment

UD owned accountable property is bar coded for identification purposes; no control number is assigned or affixed.

C. Formerly Government Owned Equipment

Red dymo label control number tags identify equipment formerly owned by the Government title to which has been transferred to UD. A UD bar code tag is used in conjunction with this red tag.

4.6 INVENTORIES/REPORTS

Inventories of accountable property are conducted and submitted under the supervision of the PA.

Inventories are the basis for audit and reconciliation of property records and assessing the need for continued use of equipment.

A. Conducting Biennial Physical Inventory

The PRMO establishes a master schedule each year for scheduling physical inventories of each University department. The schedule lists dates and times for the inventories based on the size and complexity of the inventory. One week prior to the scheduled physical inventory, the PRMO
sends an e-mail notification of the date and time scheduled for the upcoming inventory to the OFM for the department. Also attached to the notification is a cover letter stating details of the inventory and a spreadsheet listing the department’s fixed assets. On the designated date, time, and location, a PRMO team member and the OFM or delegate verify and update the location and status of all fixed assets assigned to the department. Following the inventory, the PRMO updates the Inventory Fixed Asset System to reflect any changes noted during the inventory.

B. Conducting Biennial Inventory Audit

The PRMO establishes a master schedule each year for scheduling inventory audits of each University department. The schedule lists dates and times for the audits based on the size and complexity of the inventory. One week prior to the scheduled audit inventory, the PRMO sends an e-mail notification of the date and a deadline by which the OFM shall complete the inventory audit. Also attached to the notification is a cover letter stating details of the audit and a spreadsheet listing the department’s fixed assets. The OFM is responsible for reviewing and updating the listing of fixed assets and then returning it to the PRMO. The PRMO will then reconcile the department list with the information in the Inventory Fixed Asset System to reflect any changes noted during the audit.

C. Inventory Reports

After inventories are completed and reconciled, the PRMO submits an Inventory Report to the OFM & EC. The OFM must review results and approve final inventory to complete the inventory. This report summarizes the findings of the inventory and contains the following specific information:

- Total inventory items
- Total inventory items counted
- Total inventory items missing
- Total inventory items re-allocated
- Total inventory items retired
- Total inventory items physically located in other areas
- Result percentage

D. Ad-hoc Inventories

Ad-hoc inventories are conducted and submitted as requested but usually not more frequently than once a year.

A listing identifying any discrepancies disclosed by physical inventories accompanied by a signed statement declaring that a physical inventory of all Government property was completed on a given date will be provided to the Government Property Administrator (GPA) upon request.

E. Final Inventories

Final inventories are conducted and reports submitted to the ACO at the termination of Government sponsored awards (FAR 45.600).
F. Annual Government Property Reports

UD’s property control system can provide an annual acquisition cost report by type of property. This report will be prepared by the PA and submitted on DD Form 1662 or NASA Form 1018 as of September 30. Annual inventories may also be required and reports will be produced and provided for other awards as necessary.

4.7 TRANSFERS OF PROPERTY

A. UD-Owned Property

Transfer of UD-owned property is accomplished by completing an Equipment Change Form (ECF) (Exhibit E).

B. UDRI Accountable/Government Owned Equipment

All transfers of Government property must be authorized by the ACO and are reflected/accomplished by supporting documentation; e.g., contract modifications, property records, correspondence, and shipping records. Requests for transfer or release/receipt of equipment to/from the contract sponsor must be referred to the PA to secure approval and obtain appropriate documentation. The applicable entry (deletion/addition) is made to the corresponding property record within the property records database. A copy of the transfer documentation is placed in the applicable contract correspondence file.

If Government property is delivered to UDRI without documentation, the recipient should notify the PA. After a reasonable period, the PA confirms transfer/receipt to the ACO by using the Confirmation of Receipt form (Exhibit F) designed for this purpose.

Deliverables. Items of equipment specifically identified in a contract, grant, etc., as “deliverables” to the sponsor may be delivered upon completion of the contract, or before as required.

Relief of Accountability. Relief of accountability for items transferred to contract sponsors is requested by letter in the absence of other documentation.

Transfer of Title. In accordance with (FAR 35.014 and USC 31-6306) when title is transferred from the Government to UD, the black dymo Government control tag is replaced by a red dymo UD ID tag. The equipment usually continues to be used on Government-sponsored research as before. The Government holds first priority for use of such property.

4.8 LOANS

Internal temporary loans of all property are made on an ECF (Exhibit E). A copy of the form is forwarded to the PA.

For loans of equipment made to organizations other than UD a Loan Release/Receipt Document is used (Exhibit G). The following is noted on the Release/Receipt Document:
“Borrower assumes full liability for this property and will return it in good working condition.”

The PA must subsequently be notified upon return of the previously loaned equipment/property to the custody of UD.

4.9 EQUIPMENT DISPOSITION

It is the responsibility of the PA in conjunction with the OFM to determine when property becomes idle or when further use is not anticipated.

For Government-owned equipment UD requests disposition instructions from the Federal sponsoring agency. Disposition of property is governed by individual contract terms.

A. Determination of Excess

Where there exists no further contractual use or authorization, property is listed on appropriate schedules (as determined by the PA and the Plant Clearance Officer). Disposal methods may allow property to be retained by UD, returned to suppliers (for reimbursement less restocking fees), screened for reutilization, donated to eligible donees, sold, donated to public bodies, abandoned or destroyed (FAR 45.600).

B. Submission of Inventory Schedules

Upon determination by the PA, OFM, or Equipment Custodian (EC) that property exceeds contractual authorization or need, the PA or delegate shall be notified as required. The PA is responsible for preparing inventory schedules as required. The PA shall execute the certification (included on the inventory schedule) and submit the schedule(s) to the cognizant GPA for further processing (FAR 45.602-1).

C. Related Costs

Transportation costs for screened property which is selected by another Government agency will be paid by the Government agency (transferee). Related costs (packing, crating, preparation, loading, etc.) are chargeable to the contract and these costs may be included in the settlement proposal (FAR 45.602-4). Upon shipment of selected items all historical records (drawings, technical manuals, use and maintenance logs, etc.) shall be shipped with the property.

D. Sale or Return

In the event excess property is authorized to be returned to the supplier or sold, the UDRI Accounting office is notified and proceeds shall be credited to the United States Treasury or to the price or cost of work. As necessary, the purchaser is responsible for demilitarization in accordance with DoD Manual 4160.21-M-1. Property may not be removed until demilitarization is approved by the PA or delegate and the cognizant Government representative.
E. **On-Site Abandonment**

Excess property which cannot be reutilized or disposed of will be deemed salvage or scrap and may be abandoned on-site with the PA’s approval (FAR 45.603).

F. **UD-Owned Property**

Accountable items of UD-owned property that will be traded in on new equipment, disposed of for salvage or as scrap, or for which individual identity has been lost because of integration as part of a major item of equipment are to be deleted from the property records by completion of an ECF (Exhibit E).

4.10 **INTERNAL RELOCATION/MOVEMENT OF EQUIPMENT**

The OFM or delegate is to be notified in a timely manner of permanent or long-term (longer than one month) relocation of equipment by the initiator/user. The OFM must complete an ECF (Exhibit E). One copy is kept for the OFM’s records and one is sent to the PRMO to update the applicable property records.

Temporary or short-term (less than one month) relocation or movement of equipment does not require completion of an ECF, but the initiator/user is responsible for locating equipment under his or her care in a reasonable period of time (within one business day or eight hours).

4.11 **LOSS, DAMAGE, AND DESTRUCTION OF PROPERTY**

The OFM will investigate instances of equipment loss, damage or destruction (LDD). If it is suspected that missing property may be due to theft, the OFM or delegate shall request immediate investigation by Campus Public Safety Office or, if property is located at a Government installation, the OFM or delegates request for investigation will be made to the activity’s security police.

An LDD Report (Exhibit H) should be drafted by the OFM and transmitted to the PA in all cases of loss, damage or destruction (LDD) of property as the facts become known or when requested by the PA. The PA will promptly investigate and report findings to the GPA and/or appropriate University departments.

4.12 **PROPERTY RECORDS DISPOSITION ADJUSTMENTS**

A. **Transfer of Title**

Transfer of title from research sponsors to UD is considered disposition of assets from accountability. In these cases, the PRMO will replace the black dymo control number label with a red dymo control number label. A collateral change to the automated property records will be completed to reflect title vests with UD. The assets remain accountable.
B. Disposal of Assets

Disposal of assets by removal from UD or sponsored owned property shall be recorded by the PRMO. The PA is responsible to remove bar code tags, control labels and other UD markings prior to final disposal of property. Copies of disposition documentation will be given to the OFM.

Original disposition documents will be used as source documents to post changes to the automated property records database. Records will reference disposal and appropriate document number(s) and date(s). Original disposal documentation will be maintained by the PRMO and in the appropriate contract correspondence file as applicable.

Contract correspondence and associated property records documents will be retained for a minimum of four (4) years after contract close-out or documentation (FAR 4.705-3 (a-h)).

4.13 SUBCONTRACTOR PROPERTY

Subcontractors possessing or controlling property are required to account for and manage such property in accordance with FAR 45.

4.14 SPONSORED AWARD PROPERTY CLOSE-OUT

When federal awards are due to expire, the PA or delegate shall promptly perform a final inventory of all accountable property (Government furnished, contractor and subcontractor acquired equipment). The PA will make inquiries to determine the desired or approved disposition. If necessary, the PA will investigate, report, and secure closure of all loss of Government property. The PA will request final disposition instructions from the ACO.

Upon receipt of final disposition instructions, the PA will complete the contract close-out process in a timely manner showing how the instructions were carried out. A final DD Form 1662 will be provided to the ACO to document award closure (FAR 52.245-1 (f) (1) (x)).

Contract correspondence and associated property records documents will be retained for a minimum of four (4) years after contract close-out (FAR 4.705-3 (a-h)).
5. SHIPPING PROCEDURE

Items to be shipped may be delivered to Central Receiving together with a completed Shipping Order. Shipping Order/Return Authorization Forms (Exhibit I) are available on-line. The Equipment Custodian (EC) should maintain a copy of this documentation.

Returns for refund, exchange or repair require a Return Materials Authorization (RMA) number provided by the recipient company. This number should be included on forms and the shipping label to insure appropriate handling by the recipient company.

If the initiator has had personal contact with an organization representative that person’s name, title, and telephone number shall be noted. It is also helpful to note the pertinent information about that contact on the form. Adequate packing, particularly of delicate items, should be accomplished by the initiator. Costs are chargeable to the account indicated on the Shipping Order. Incoming boxes or crates should be saved if it is anticipated the item(s) will be returned to the vendor for repair, exchange or modification.
6. RETURN PROCEDURE

Initiators/requisitioners and Equipment Custodians (ECs) are responsible for notifying vendors of a necessary return and/or exchange, and for obtaining a Return Authorization number and/or name of person contacted. Include the return information obtained from the vendor on a completed Shipping Order/Return Authorization Form (Exhibit I) and deliver to Central Receiving along with the merchandise to be returned. Notify the Accounting Office of any changes in price from the original purchase request to insure proper credit.

For additional information see previous Section 5, Shipping Procedure.
7. EQUIPMENT USE, MAINTENANCE AND STORAGE

7.1 USE

The individual responsible for each equipment item shall ensure that the equipment is adequately protected from theft or abuse and that operating personnel are instructed in the proper use of equipment (FAR 45.104(b)). This individual shall maintain manufacturing and assembly drawings; installation, operation repair and maintenance instructions (and records) and all technical data pertaining to each equipment item. Additionally, Government property may only be used for those purposes authorized in the applicable Government contract (FAR 45.301(a), 45.303).

With respect to capital equipment an accounting may be maintained (Exhibit J.1 – suggested format) to record actual use of the item. This utilization log may be reviewed periodically to ascertain need for continued retention of the asset.

7.2 MAINTENANCE

The individual responsible for the equipment item, in conjunction with the Equipment Custodian (EC), is to establish and maintain a program for maintenance, repair, protection, and preservation of Government property. Maintenance plans should include disclosure of the need for maintenance, performance of preventive maintenance, and recording of maintenance performed (Exhibit J.2 – suggested format). Preventive maintenance includes inspection to detect need for repairs, lubrication, adjustments, cleaning, and calibration as appropriate. The need for major repair should be reported to the Property Administrator (PA) for disclosure to the appropriate Government functionary(ies).

7.3 STORAGE

Proper protection of equipment includes, but is not limited to security from pilferage; adequate prevention of handling damage; protection against water damage, insects and rodents, or from deterioration due to dust, temperature and humidity. Storage of sensitive equipment, items with a shelf life and classified equipment should be coordinated with the Property Records Management Office (PRMO) to ensure appropriate controls and handling.
8. KEY CONTROL AND ACCESS

The Property Administrator’s (PA’s) responsibilities include the issuance and control of keys and provision of access to Research Institute facilities. Orders for new/additional keys are placed to the Key Shop by the PA or delegate. Keys may only be duplicated by the University of Dayton’s (UD’s) Key Shop.

8.1 ISSUANCE

Each key that is issued must be signed for in the Purchasing Office by the individual to whom it is issued. That individual bears responsibility for the safe keeping and proper use of the key. Students and graduate assistants may obtain keys upon written request of their supervisor.

When a key is no longer needed by the individual it is to be returned promptly to the Purchasing Office.

8.2 RECORDS

A record is created and maintained for each key issued. Appropriate procedures are implemented when a key is returned because of relocation or termination of employee.

Periodic inventories are conducted during which individuals may be requested to verify possession of keys for which the records indicate they are responsible.

8.3 ACCESS

The PA or delegate can provide or deny access in accordance with University of Dayton Research Institute (UDRI) & UD policy.