

Equipment Inventory Instructions

A. To be included in the inventory an item must meet the following criteria:

1. Ohio University property.
2. A cost of \$5,000 or greater when purchased.
3. Non-expendable with a useful life of over one year.
4. Gifts with an appraised value of \$5,000 or more.
5. Items Ohio University is leasing or renting, if the lease is applied towards the purchase of the item and is determined to be a capital lease.
6. Fabricated items with a total cost of \$5,000 or greater.

The following do not meet the above criteria – do not include in inventory:

1. Items furnished by a grant or contract for which Ohio University does not hold title.
2. Personally owned items.
3. Draperies and other expendable items.
4. Items permanently attached to buildings. Examples of items would be laboratory benches with service connections, fume hoods, light fixtures, built-in cabinets, permanently installed heating and cooling apparatus (not including window air conditioners), and carpeting.
5. Items tagged after March 31 (for certifications sent in April) or September 30 (for certifications sent in October), of the current year.

B. EI-8 Form

If your audit results do not match the Oracle OBIEE Report, corrections can be made by using an EI-8 Form. Please limit the information on the form to corrections that involve additions or deletions. All other corrections can be made directly on the report printout (see Section C). Forms can be obtained on the Division of Finance Forms at:

<http://www.ohio.edu/finance/equipmentinventory/EIFORMS.cfm>

Items to be listed on the EI-8 Form:

Additions:

Any item not listed on your print-out that needs added (see criteria in Section A), enter it with a note “NO TAG” in place of tag number. Include person to contact, original or estimated cost, serial number, description, and purchase order number if known.

Deletions

Any item that needs removed from the inventory list must have an EI-8 form completed with the appropriate signature.

C. Auditing the OBIEE Report:

The following columns must be checked for complete and accurate listings of each item of equipment, and any corrections made directly on your report printout that is to be returned to the Equipment Inventory Department.

1. Assigned to
2. Tag Number
3. Description
4. Serial Number
5. PO Number – Purchase Order number when purchased, if known
6. Cost
7. Building Name
8. Room Number

If any of this information is not correct, it is the department's responsibility to make corrections. Any changes should be made on the report printout and be marked clearly in red ink. Incorrect information should be crossed out. If a tag has been lost or destroyed and the item can be identified on the print-out; write the note "RETAG" next to the tag number and an inventory employee will come out to retag the equipment. If changes are made on an Excel spreadsheet the changes must be highlighted.

D. EI-9 form

If equipment is removed from Ohio University grounds, an EI-9 form must be completed. This will help both your department and the Equipment Inventory office to accurately track equipment. Please keep the original form for your files and send a copy to the Equipment Inventory office at 280 WUSOC. When the item is returned to Ohio University property, complete the bottom portion of the EI-9 form and send a copy to the Equipment Inventory office. The form can be obtained at: <http://www.ohio.edu/finance/equipmentinventory/EIFORMS.cfm>

EI-9 forms should be updated every three years for items that will be off of Ohio University property for an extended period of time.