Pre-Inventory Checklist Page

Tasks to begin at least 30 days prior to Physical Inventory:

☐ Record new assets into Sunflower Assets (SFA). Update custodian name and any other fields in SFA as necessary.

☐ Walk your areas and familiarize yourself with the locations of all your department's assets (including all offices & administrative areas, labs, storage areas, closets, off-campus sites, etc.).

☐ Verify equipment status. Update SFA as needed.

☐ Ensure excess requests have been submitted as needed.

☐ Make photocopies of the *Off Campus Asset* forms for the Inventory team to pick up when they arrive to scan assets. Please be sure that all forms have been updated within 12 months of the scheduled inventory date (printed email confirmations from the custodians is acceptable). Forms are available on the PMO website.

☐ Identify selected areas in your department that will need *additional review or special arrangements* prior to the physical inventory, such as hazardous areas, radiation zones, confined spaces, lab areas, clean rooms, sensitive experiments, etc.

☐ Review contents of "Untaggable Assets" folder or binder. Make sure "untaggable" assets in the binder are correspondingly marked as such in Sunflower. Purge outdated or disposed records; add any new "untaggable" paper records to the binder.

☐ Ensure Space Coordinator has updated all building space in iSpace prior to inventory visit.

☐ Arrange for knowledgeable escorts of your area, particularly in departments with a heavy concentration of labs and scientific areas. Arrange for the services of such "local experts" or guides well in advance of the physical inventory.

☐ Notify staff of pending inventory scanning schedule, including dates and times of expected visits. (*Signs will be provided 2 weeks prior to the scanning event. Sample email notices are available on the PMO website.*

Tasks to perform in the week prior to your inventory:

☐ Remind colleagues, associates, staff and faculty members of upcoming inventory.

☐ Advise colleagues, associates, staff and faculty members to prominently label *all personal items* to avoid the possibility that those items will be added as assets during the inventory.

☐ Confirm the inventory schedule with escorts who'll be accompanying the Inventory team. Make sure they have access to all locations, including keys, cardkeys, door codes, etc.

Other key points to remember:

☐ Computer users, lab workers, machine operators (anyone using capital equipment at the time of the physical inventory) may be interrupted as bar codes are read, data is entered, etc. Their patience is appreciated!

☐ Having items staged so tags are visible can help avoid the need to handle sensitive equipment items. Assets may need to be lifted, turned, or removed from drawers, shelves, etc. in order to access the barcode. The Inventory staff is very careful when handling equipment, and they try to avoid doing so whenever possible.

☐ At the conclusion of the inventory of all spaces involving your Department, you'll be provided with a list of items not located, to complete the physical inventory reconciliation. The reconciliation period varies from 2 to 6 weeks based on the number of assets in your department. Contact the Inventory staff to arrange for scanning of items once they are located.