School District of Brevard County

Property Control Manual
For Property Custodians and Designees

Revised April 2016
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Chapter 1

Introduction

1.1 Purpose of Manual:
Accounting for, managing, and safeguarding of property is the responsibility of each student and employee of the District. This manual establishes procedures for District property as authorized by Board Policy Section 7000.

1.2 Authority:
- Florida Statutes, Section 274
- Florida Administrative Code Chapter 69I-73 –Tangible Personal Property Owned by Local Governments
- Bylaws & Policies of the School Board of Brevard County, FL, Section 7000

The District is required to account for tangible personal property (furniture, equipment) and intangible personal property (software) of a non-consumable nature at the value of $1,000 or more and the normal expected life of more than one year within the guidelines of the policies governing fixed assets, which involve tagging, property record maintenance, and conducting annual inventory on all fixed assets.

1.3 Property Custodian & Property Designee:
The Property Custodian is the person to whom the custody of district property has been delegated by the governmental unit. Board Policy Section 7300 appoints the Principal/Department Head as custodian for all tangible and intangible personal property acquired with district funds, school internal funds, or by donation.

The Property Custodian is responsible for all property items on site, including the recordkeeping for those items. The District uses the CrossPointe Asset Management system for property, and all Property Custodians receive access to update information in the system for their inventory. Property Custodians also are responsible for approving transfers of property into or out of the site. Training in Asset Management is available to custodians upon request.

Board Policy Section 7300 also provides for the Property Custodian to appoint a delegate, an employee under his/her supervision, to assist with property custodianship. This employee is referred to as a Property Designee.

In order for a Property Designee to receive access to the Asset Management record system, the Property Custodian must provide the request via email to the District’s Property Control department at ESF. After the designee receives system training through Property Control, his/her access will be granted.

1.4 Tangible and Intangible Personal Property:
The term “tangible personal property” refers to furniture, fixtures, equipment, vehicles, computer equipment, and audio visual non-consumable materials. The term “intangible personal property” refers to software.
1.5 Supplies vs. Property:
   a) The term “Property” refers to items described in section 1.4 whether new or replacement equipment, or software. Sites should record property using a 6xx object for equipment or a 36x object for annual licenses, subscriptions, or maintenance fees for software.
   b) The term “Supplies” refers to items of an expendable nature that are consumed, worn out or deteriorated in use, or items that lose their identity though fabrication or incorporation into different or more complex units or substances.

Appendix A provides detailed guidance for selecting appropriate object codes.

1.6 Security of Property:
Security of District property is the responsibility of every employee. All property items should be secured in a manner that reduces the likelihood of theft, damage or loss.

Consider the following precautions for your site:
   a) Store small, portable items in locked cabinets or closets when not in use. Lock classrooms & offices when not in use.
   b) Order replacements for missing or illegible property tags as soon as possible.
   c) If you allow employees to take items off-site, make them aware of the importance of safeguarding them, and reporting loss or theft immediately.
Chapter 2

Acquisition of Property

2.1 Acquisition of Property via Purchase
Recording of property begins at the point of acquisition. Any item purchased that meets the definition of “Property” in Section 274, F.S. must be recorded, tagged and tracked. The purchase of property follows these steps:

a) A district or internal purchase requisition is entered in the system taking care to utilize the correct Object Code for capital assets. (See Section 2.2, “Selection of Object Codes,” below, and Appendix A for detailed guidance on object codes.)
b) Once the requisition is approved a Purchase Order is created.
c) When the school or department physically receives the asset from the vendor the receiver of the item should inspect it and complete the F822 Receive Items panel in TERMS to document receipt of the goods.
d) Property Control then records the item and generates a property tag.
e) The tag and the accompanying Property Tag Confirmation Form (Appendices D-2 & D-3) are sent to the site’s Property Custodian via courier to be affixed to the appropriate asset. It is very important for the site’s Custodian or Designee to compare the asset description per the Confirmation Form to the actual asset to ensure the tag is affixed to the correct asset.
f) The site’s Custodian or Designee should complete the confirmation form including the model and serial number. This information should also be entered into CrossPointe Asset Management, as well as the building and room numbers where the asset(s) will be located.
g) The completed form should be returned to Property Control within ten working days.
h) Property purchased with school internal accounts funds must be tagged and recorded in the District’s property records if the purchase price is $1,000 or more. Schools should provide a copy of the invoice to Property Control within 10 working days of receipt of the asset.
i) The District’s Property rules apply regardless of the funding source used to purchase the item. Items purchased with Federal grant funds are required to be tagged and inventoried like any other item of property, but sites should consult with grant administrators before reallocating the property item for use in a different program or by a different group of students; transferring property to other sites; or disposing of property purchased with Federal grant funds, as special rules may apply.

2.2 Selection of Object Codes
The object code used for the purchase requisition indicates whether the item being purchased is property, and if it should be tagged. Use of the correct object code is critical for accurate recording of items purchased. Follow these basic guidelines to determine the correct object code for your purchase. More detailed guidance is also available in Appendix A of this manual.
a) Step 1: Is the purchase Supplies or Property?

<table>
<thead>
<tr>
<th>Property:</th>
<th>Supplies:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Do not get used up</td>
<td>• Consumed as they are used</td>
</tr>
<tr>
<td>• Withstand repeated use</td>
<td>• Deteriorate/wear out as they are used</td>
</tr>
<tr>
<td>• More economical to repair than replace</td>
<td>• More likely to be replaced than repaired</td>
</tr>
<tr>
<td>• Expected to last one year or more</td>
<td>• Expected to last less than one year</td>
</tr>
<tr>
<td>• Identifiable and useable as stand-alone items</td>
<td>• Easily assimilated into another item</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Examples of Property:</th>
<th>Examples of Supplies:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printers (including 3D printers)</td>
<td>Printer paper or cartridges</td>
</tr>
<tr>
<td>Computers (including laptops and tablets)</td>
<td>Computer bags or cases</td>
</tr>
<tr>
<td>Pitching Machines, Gym Equipment</td>
<td>Baseball bats, tennis racquets</td>
</tr>
<tr>
<td>Stereo Equipment</td>
<td>Earphones</td>
</tr>
</tbody>
</table>

b) Step 2: If you have determined that your purchase is for Property, it should be classified as one of the following:

1. **Audio/Visual Materials**
   Classroom aids and materials such as charts, maps, globes, and audio and video recordings.
   
   *Use object 621 if price* ≥ $1,000
   *Use object 622 if price* < $1,000

2. **Software**
   Licenses for new software OR upgrades that will extend the life of existing software.
   Does NOT include software that is pre-loaded on a new computer and included in the purchase price, or charges for maintenance or training.
   
   *Use object 691 if price* ≥ $1,000 AND useful life ≥ 5 years
   *Use object 622 if price* < $1,000 OR useful life < 5 years

3. **Motor Vehicles**
   Includes school buses and other street-legal motor vehicles such as passenger cars and trucks.
   Does NOT include golf carts, ATVs, or forklifts (use object codes for “All Other Equipment,” below)
   
   *Use object code 651 for school buses*
   *Use object 652 for all other vehicles*

4. **Computer Hardware**
   Includes computers (desktops, laptops, and tablets) and peripheral devices (printers, scanners, routers, interactive whiteboards).
   
   *Use object 643 if price* ≥ $1,000
   *Use object 644 if price* < $1,000
5. All Other Equipment
   Includes equipment that does not belong in any of the other categories mentioned above. Examples are ATVs and golf carts, furniture and shelving, custodial and kitchen equipment, and musical instruments.
   *Use object 641 if price* $1,000
   *Use object 642 if price < $1,000*

   c) Use object code 511 for supplies.

Refer to Appendix A for even more detailed guidance on choosing the correct object code.

2.3 Acquisition Via Methods other than Purchase:
   a) Acquisition by Donation:
      Board Policy Section 9230 provides guidance regarding the acceptance of donated property. If a donated item has a fair market value of $1,000 or more when donated, it must be tagged and recorded in the District’s property records. It then becomes property of the School Board. This rule applies regardless of the source of the donation.

      Use the Property Donation Form to report donations to your site. Send the completed form to Property Control within 10 working days of the receipt of the donation.

   b) Acquisition through Warranty Exchange:
      Assets replaced under warranty will be assigned the same tag number as the original and must be tagged. Complete the Replacement Under Warranty Form (Appendix D-7) located on the Property Control website to receive the replacement tag. Sites should email this form to Property Control within 10 days of receipt of the replacement assets. Refer to Chapter 8 for disposing of the original asset.

   c) Acquisition through Trade-In:
      When a site exchanges existing property for a new item and receives a monetary allowance for the traded property, the site must record the disposition of the traded-in property using the procedure described in Chapter 8. To record the acquisition of the new item,
      1) Prepare a requisition in the same manner as any other purchase. List the asset tag number of the item(s) for trade-in in the comment section of the requisition. A complete explanation of the trade-in is required.
      2) List the trade-in allowance in the comment section of the requisition.
      3) The amount of the requisition should be the net amount that you will pay for the new item. For purposes of determining the correct object code to use for the purchase, however, consider the full purchase price of the asset without regard of any trade-in allowance.

      Example:
      | Purchase Price of New Asset | $ 2,000.001 |
      | Less: Trade-In Allowance    | (1,200.00)   |
      | Net Purchase Amount         | $ 800.002    |

      1Determines object code to be used for purchase requisition
      2The total amount of the purchase requisition
Chapter 3

Receiving and Tagging Property

3.1 Receiving of Property by Site:
Each site has at least one employee who records the physical receipt of items delivered to the site in TERMS. This person is typically the secretary or bookkeeper. Because the receiving function begins the tagging process, the steps for receiving are listed below:

a) The Receiver should inspect items to ensure that all are accounted for and undamaged.

b) Note the quantity of items received on the carrier’s shipping papers.

c) File the purchase order, requisition, packing list, and carrier’s shipping papers in case they are needed for future reference.

d) Go to TERMS panel F822 and record receipt of the items.

e) If a purchase is returned or if a receiver is entered into TERMS in error, contact Property Control at ESF as soon as possible.

3.2 Tagging of Property:

a) Property Control will send tags to the Custodian’s attention for newly purchased property. Affix the tag(s) to the item(s) ASAP.

b) Affix the tag in a visible and scannable area. For ease of identification and consistency, upper left front is suggested.

c) Take steps as practicable to protect the asset tag from damage or removal. If the item is subjected to repeated cleaning (e.g., cafeteria equipment), consider placing clear packing tape or a clear label over the tag to protect it. If the item is used or stored outside place the tag in a location that is accessible for inventory but is protected from the elements. Consider some protective tape to guard against dirt.

d) For computer systems, only one tag will be issued. Affix this tag to the CPU only. Do not place the property tag on peripheral equipment, including monitors.

e) Additionally, where practical, it is recommended that assets be prominently marked with “SBBC” along with the property tag number. This can be done with a permanent marker, such as a black or silver metallic Sharpie. Etching the property number onto the property with an etching tool is also recommended as long as it does not damage the property or void any warranty.

3.3 Property Tag Confirmation:
Property Control will send a Property Tag Confirmation Form (Appendices D-2, D-3) along with the property tag(s) for all tangible personal property. Assets must be tagged and the completed form must be returned to Property Control within ten days of receipt of the property.

a) Before returning the Confirmation Form, record the serial number and Building/Room number into the Update Asset Building/Room panel (J402) in the Asset Management System.

Please ensure accuracy of the Serial number recorded in Asset Management and noted on the Confirmation Form. An accurate serial number is crucial for tracking the asset if it is lost or stolen.

b) If the property tag(s) are not received at the school or department within two weeks of the date of receipt of the property, the site should immediately notify Property Control.
c) If a site receives a property tag for property that has not been physically received at the site, notify Property Control as soon as possible.

3.4 Replacement Tags:
   a) If a tag becomes illegible or is inadvertently removed request a replacement tag using the Replacement Tag – Single or Replacement Tag – Multiple Form (Appendices D-5, D-6). Replacement requests should be made immediately upon discovery of the damaged/missing tag.
Chapter 4

Inventory of Property

Physical Inventory of Property:
As required by Section 274, Florida Statutes, and Board Policy 7450, all sites must perform a complete physical inventory
- annually, and
- whenever there is a change of custodian.
If Property Custodian turnover occurs within 60 days of annual inventory the new custodian will have the option to accept the results of the annual inventory or complete a full inventory.

Important: The turnover inventory establishes the physical inventory on site when a new custodian takes over. It is his/her sole opportunity to report any missing assets before his/her “watch” begins. Once a new custodian signs a turnover inventory or agrees to accept an existing inventory, s/he becomes fully accountable and responsible for all of the assets listed. It is strongly recommended that new custodians perform a full physical inventory.

a) All assets purchased by the District, (regardless of the source of funds used for the purchase), or received via donation, should be included in the District’s tangible personal property records and included in your physical inventory count.
b) Property Control holds inventory “kickoff” meetings at the beginning of the annual inventory cycle, usually in the fall of each year, to provide guidance regarding the inventory process. Example instructions are included as Appendix C. The kickoff meeting schedule and inventory due dates are announced via the Leadership Team packet.
c) Sites must ensure that they have physically inspected every item on their inventory. As part of the requirements of a full physical inventory, site personnel are expected to “see” and/or “touch” every item on the inventory. It is imperative the sites verify all information on the report is accurate, including, but not limited to, serial number, model number and building and room locations. If any errors are noted in the serial or model number, record corrections on the inventory report that is submitted to Property Control. Property designees may update building and room locations in CrossPointe at any time.
d) The site’s Property Custodian must provide a signed attest letter for each item marked missing. The letter must meet all of the following criteria:
   1. Printed on the site’s letterhead
   2. Signed by the Property Custodian
   3. Include, for each asset,
      i. Asset Number and description
      ii. Any information about the item’s last known location
      iii. Description of the efforts taken to locate each item
      iv. Any documentation of the item’s removal, such as a work order or purchase order
      v. A thorough and specific description of what is known/believed to have caused the item’s disappearance.

If an attest letter does not meet any of these criteria Property Control may request a replacement letter from the Property Custodian. Missing items will not be presented to the
Board for disposal without an adequate attest letter. Remember that attest letters are public record, may be included in the Board agenda when the asset is disposed, and are subject to public inspection at any time.

e) Property reported Stolen must be supported by a copy of the police report that includes the asset number(s) and/or serial number(s) and description(s) of the stolen item(s), signed by the Property Custodian. If there is no police report, or the police report does not contain this information, the asset will be marked as missing and an attest letter will be required.

f) Tagged property not listed on the site inventory should be added to the last page of the inventory report and must include all pertinent information. Additional items located at your site might be another site’s missing property.

g) All physical inventory counts must be certified as complete and accurate by all personnel assisting with the physical count as well as by the Principal/Director or above of the site by completing the Property Inventory Certification Form (Appendix D-9).
Chapter 5

Loaning Property

Any time tagged property leaves the assigned school or department location, written authorization must be obtained from the Property Custodian. Board Policy Section 7320 prohibits property from being taken from any school building or premises for private use. However, property may be loaned to employees, outside agencies or organizations with prior written approval of the principal or director.

If property is loaned the site should use a Property Loan Form (Appendix D-8) to document the physical location of item. The borrower’s signature is an agreement to replace or repair, at his/her own expense, any loss or damage to this equipment while on loan.
Chapter 6
Transferring Property

6.1 Property Transfers Processed through Asset Management: Transfers are used to track and document the movement of property between District sites and from a District site to the Surplus Warehouse to be retired. All transfers, except those described in section 6.3 below, must be processed using the Asset Management System.

Sending Site:

a) The site’s Property Designee goes into Asset Management, then selects Initiate Asset Transfer. Enter the information for the asset being transferred.

b) Select one of the following transfer methods:
   o SN – site to site transfer with NO Surplus Warehouse staff involvement
   o TR – Site to site transfer to be performed by Surplus staff (for items that Surplus will pick up and take to another site. Do NOT use this option for items going to Surplus to be retired)
   o SU – transfer of items to the Surplus Warehouse (for obsolete/unusable items being DCR’d for retirement). If using this option, select 9840 as the Receiving Location.

c) The sending site’s Property Custodian must approve the transfer in Asset Management before any property can be moved from the site. Once approved, the physical transfer of the asset may take place.

d) Property awaiting pickup by Surplus should be kept in a secure location away from other property to help prevent inadvertent removal of items not intended for transfer. **Never store items outside.**

e) Only Surplus Warehouse drivers are authorized to transfer property to the Surplus Warehouse. The Surplus staff should receive a signature from the sending site and provide a copy of that documentation as evidence that the transfer took place.

f) If Surplus is unable to pick up an item because it is too large or needs special handling, Surplus will direct site personnel to prepare a work order for Maintenance or Transportation. Be sure to include the property number on the work order, and record the work order number on any paperwork associated with the asset being moved. When Maintenance or Transportation picks up the item, they should provide paperwork to the site, and obtain a signature to confirm pickup. Write the asset number on the copy of the pickup paperwork that is left for the site. If they do not provide paperwork, contact the Surplus Warehouse before allowing the item(s) to be taken from the site.

g) Because there is often a lag between the pickup of property and clearance of the transfer in Asset Management, sites are advised to keep transfer documents on file for at least one full inventory cycle following pickup of property.

h) It is the sending site’s responsibility to ensure a transfer is completed within ten working days (The CrossPointe Asset Management User’s Manual, pages 34-37, gives detailed instructions for checking the status of pending transfers).

Receiving Site:

a) The Property Custodian may authorize several employees to receive property that has been transferred to the site, and only these employees should receive property. These employees
need not have access to the Asset Management system, but must notify the Property Custodian and designee when assets are received so that the transfer can be completed.

b) When property is received, the designee goes into Asset Management and receives on the transfer. The Property Custodian then goes into Asset Management to approve the receipt, which completes and closes out the transfer.

6.2 Blocked Transfer Process:
The Board requires an explanation as to why an item is determined to be surplus when it meets any of the following criteria:

1. Less than 5 years old
2. Original cost was more than $5,000
3. Has not yet met its life cycle (e.g., an asset with an expected useful life of 5 years that is being disposed after only 3 years)

If a site attempts to transfer an item to the Surplus Warehouse for disposal that meets any of these criteria, the Asset Management system will block the transfer. In order to complete the transfer and dispose of the item, the Surplus Warehouse will prepare a Surplus Property Disposal Justification Form (Appendix E) and give it to the site, which must then collect the approval signatures of the appropriate department head(s), and return the form to the Surplus Warehouse.

Once all signatures are received and the original form is returned to the Surplus Warehouse, they will notify the Property Custodian at the school or department that the transfer can be entered electronically. The transfer can then be entered into Asset Management following the instructions from section 6.1 above. Because only a limited number of blocked transfers can be opened for processing at any given time, sites should act quickly to process the transfer as soon as they have received notification from the Surplus Warehouse.

If you have any questions related to this process or concerns about where your transfer is at in the process please contact the Surplus Warehouse.

6.3 Property Transfers not Processed through Asset Management
When property is transferred off-site temporarily for repairs, the transfer is not recorded in the Asset Management system. The following types of transfers are processed using work orders only:

a. Cafeteria Computers. Cafeteria computers are considered the property of Food Services, and sites should notify that department when repairs are needed.

b. Technology. Repair of computers (other than cafeteria computers), copiers, audio/visual equipment, and network equipment are handled by Educational Technology (ET). Contact the ET Help Desk to obtain a work order. Note the property number on the work order, and note the work order number on any paperwork related to movement of the property.

c. Plant Operations/Maintenance Equipment. Repair of non-technology equipment is processed via repair orders issued from Plant Operations and Maintenance. Contact Facilities for repair of these items. Note the property number on the work/repair order, and note the work/repair order number on any paperwork related to movement of the property.
d. In the case of any equipment removed for repairs, the site that “owns” the property should ensure that they receive a copy of the work ticket that includes the name of the person who picked up the item and the pickup date.

e. All items should be returned to the originating site when the repair is complete. If the item is beyond repair, it should still be returned so that the site can submit it for disposal. Sites should get a copy of any paperwork showing return of the item to the site, as well as any paperwork showing that the item was irreparable.

6.4 Transfer of Previously Retired Item(s): Occasionally a retired item may be redistributed to a school or department instead of being disposed. Once that item is considered obsolete and needs to be transferred to Surplus the transfer cannot be entered electronically since the item is already retired. Please utilize the DCR-1 Form and attach a printout of the J201 Maintain Asset Definitions panel from the Asset Management System showing the retirement date.

**IMPORTANT:** Regardless of the type of transfer, only authorized BPS staff may move property. Never allow contractors or vendors to move property.
Chapter 7

Stolen Property

Any instance of theft, loss, or damage to equipment should be reported to Risk Management using an Accident/Incident Report. Sites should also call law enforcement if a theft occurs. Please provide a copy of the Incident report and police report to Property Control within ten working days of the incident. Do not wait until annual inventory to report these items.

Be sure to provide the asset numbers, serial numbers, and descriptions of stolen items to law enforcement to be included in the police report. Have the Property Custodian sign the police report. This information is required to be included in the police report in order to record the item(s) as stolen, rather than missing.
Chapter 8
Disposal of Property

8.1 General:
All property disposals must be presented to the School Board for approval. All property is presented to the School Board by a joint effort between Accounting Services and Purchasing and Warehouse Services. Property approved by the School Board for disposition will be retired from the district’s inventory.

8.2 Disposal of Obsolete/Surplus Property:
Property that is obsolete, beyond economical repair, or otherwise no longer useable by the site should be transferred to the Surplus Warehouse by entering a transfer in Asset Management using code SU and center 9840 as the Receiving Site (refer to Chapter 6). Once the transfer is approved Surplus will pick up the item. Surplus will determine if the item can be used at another district site or if it should be presented to the school Board for disposition. Disposal of property, whether via sale, recycling, or waste removal, is handled solely by the Surplus Warehouse. The sale of district property is coordinated through Surplus ONLY; schools and departments may not sell district property to anyone (including other schools) under any circumstances, regardless of how, or from whom, the property was acquired.

8.3 Disposal of Cafeteria Equipment:
With the exception of computers, all cafeteria property is the responsibility of the site in which the cafeteria property is located. Food Services should be contacted directly for any disposal needed in respect to cafeteria computers. All other cafeteria property should follow the disposal procedures described above.

8.4 Disposal of Junk/Unusable Property:
Schools or departments are not allowed to cannibalize property, nor are they permitted to sell or give away property to be used for scrap or spare parts. All disposals must go through the Surplus Warehouse using the procedure described above, and must ultimately go before the Board for approval. Even if the item is beyond repair and unusable, the disposal must go through the Surplus Warehouse so that it is properly documented and in compliance with Board policy. **DO NOT DISCARD OR DESTROY PROPERTY UNDER ANY CIRCUMSTANCES.**

8.5 Disposal Due to Trade-In:
If a site has arranged to trade in an existing property item for credit against a new purchase, the trade in of the old item must be treated as a disposal and removed from the property records using the following procedure:

a) Send a memorandum via email to the Surplus Warehouse, listing the property record numbers and types of equipment to be traded in, including the vendor’s trade-in allowance. A quote from the vendor providing the trade-in opportunity should be included as supporting documentation. Copy the Director of Purchasing and Warehouse Services and the ESF Property Control department on the memorandum.
b) If the Surplus Warehouse accepts the trade-in memo, it will include the property to be traded in on a Board agenda for approval. Once the disposal is approved, the item will be retired from the asset records.

c) Following approval by the school Board, the Surplus Warehouse Services will send written notification to the Property Custodian as authorization to proceed with the trade-in of the asset.

d) Purchase of the replacement item is done by issuing a requisition.

e) Before surrendering the trade-in asset to the vendor, the site must remove the property tag and send it to the Director of Purchasing and Warehousing.
Appendix A
Selection of Object Codes

To determine the correct object code to be applied to an item purchased or received via donation.

NOTE: This chart is intended for purchases of furniture, equipment, and vehicles ONLY. For purchases associated with construction, remodeling, renovation, or playground/sports fields, please contact Facilities.

Section 1. Supplies vs. Property

Start

Consider items being purchased.

Is the item consumable?

Yes → Item is supplies, not property. Use object code 511.

No → Does item have a useful life ≥ 1 year?

Yes → If item breaks, is it more likely to be repaired than replaced?

Yes → Is item useable on its own, not assimilated into some other item?

Yes → Choose the category of the item being purchased.

No → No → No

Examples of Supplies:

<table>
<thead>
<tr>
<th>Laptop Bags</th>
<th>Tablet cases/covers</th>
<th>Ink/Toner/Filament</th>
<th>Projector Bulbs</th>
</tr>
</thead>
<tbody>
<tr>
<td>USB Flash/Jump/Thumb Drives</td>
<td>Headphones</td>
<td>Network Cables</td>
<td>Bats/Racquets</td>
</tr>
</tbody>
</table>
Appendix A (cont’d)
Selection of Object Codes
Section 2. Audio/Visual Equipment

Audio/Visual Equipment

Is the per-item purchase price* $1,000?

Yes

Use object code 621. Item will receive a property tag & number.

No

Use object code 622. Item will not receive a property tag.

Examples of Audio/Visual Equipment:

<table>
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<tr>
<th>Pre-Recorded CDs and DVDs</th>
<th>Maps</th>
<th>Digital Recordings</th>
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</thead>
<tbody>
<tr>
<td>Charts</td>
<td>Globes</td>
<td>Films/Filmstrips</td>
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</table>

*PER-ITEM PURCHASE PRICE = The purchase price of the item (or fair market value on date of donation)
PLUS Shipping/Freight costs and Installation Costs (but NOT training costs)
Appendix A (cont’d)
Selection of Object Codes
Section 3. Motor Vehicles

*PER-ITEM PURCHASE PRICE: The purchase price of the item (or fair market value on date of donation) PLUS Shipping/Freight costs and installation costs (but NOT training costs)
Appendix A (cont’d)
Selection of Object Codes
Section 4. Software

**Software**

Is the software an operating system included in the price of a new computer (e.g. Windows)?
- **NO**
  - Use object code 365 (District) or object code 310 (Internal)

Is the software a subscription or a rental only (NOT a license)?
- **NO**
  - Use object codes Training: 312 Maintenance or Support: 364 (District) 310 (Internal)

Is the purchase for training, support, or routine maintenance for existing software?
- **NO**
  - Use obj code 692

Is this a software license (whether on disks or downloaded) OR an upgrade to existing software that will add functionality or lengthen its useful life?
- **Yes**
  - Is the per-item purchase price $1,000?
    - **YES**
      - Is its useful life ≥ 5 Years?
        - **YES**
          - Use obj code 691
        - **NO**
          - Use obj code 692
    - **NO**
      - Use obj code 692

**PER-ITEM PURCHASE PRICE** = The purchase price of the item (or fair market value on date of donation)
PLUS Shipping/Freight costs and Installation Costs (but NOT training costs)
Appendix A (cont’d)
Selection of Object Codes
Section 5. All Other Equipment

Is the item computer hardware or a peripheral?
Yes

Is the per-item purchase price ≥ $1,000?
Yes

Use object code 641. Item will receive a property tag & number.

No

Use obj code 642

Yes

Is the per-item purchase price* ≥ $1,000?
No

Use obj code 644

Yes

Use obj code 643. Item will receive a property tag & number.

*PER-ITEM PURCHASE PRICE = The purchase price of the item (or fair market value on date of donation) PLUS Shipping/Freight costs and Installation Costs (but NOT training costs)

Examples of Other Equipment (objects 641/642):
ATVs
Cameras/Camcorders
Chairs/Desks/Table
Golf Carts
Kitchen Equipment
LightSpeeds
Musical Instruments

Examples of Computer Hardware and Peripherals (objects 643/644):
Computers (incl. Laptops, Tablets, e-Readers)
Interactive Whiteboards
Monitors
Memory/Upgrades
Printers (incl. 3D Printers)
Routers
Appendix B
References

I. Chapter 274, Florida Statutes

II. Bylaws and Policies of the School Board of Brevard County, Florida
   Policies and Administrative Procedures related to property are:

   a. Policies:
      1. 7300 – Property Custodianship
      2. 7310 – Disposition of Surplus Property
      3. 7320 – Acquisition, Removal, Disposal, Sale or Exchange of Major Tangible
         Property
      4. 7450 – Property Inventory
      5. 7455 – Accounting System for Fixed Assets
      6. 9230 – Gifts, Grants and Bequests

   b. Administrative Procedures:
      1. 7300 – Acquisition or Disposition of Property
      2. 7310 – Acquisition or Disposition of Property
      3. 7320 – Acquisition or Disposition of Property

III. Florida Administrative Code
    a. Chapter 69I-73 – Tangible Personal Property Owned by Local Governments
Appendix C – Inventory Instructions

(The following instructions are updated annually and provided to sites at the start of the annual inventory cycle. Due dates are announced via the Leadership Team Packet.)

An annual physical inventory count of all tangible personal property is required per Section 274, Florida Statutes. In order to complete the annual physical inventory count, each worksite has been provided with its inventory report. The inventory report is a complete list of the worksite’s property inventory records.

All assets purchased with District funds, internal funds, federal funds, grants, or fundraisers, or received via donation, belong to Brevard Public Schools and should be included in the District’s personal property records. Please include all personal property in your physical inventory count.

I. To complete the annual physical inventory count:

1. Print out your inventory report or attend a kick-off meeting to receive a hard copy.
2. Please use blue ink only on all of the forms and please do write legibly.
3. Please do not utilize any highlighters on the inventory report.
4. Please ensure that every item on the inventory report is accounted for (including all software).
5. Please provide one of the following Status Codes for each item in the space provided on the inventory report:
   - A Active – physically located at the worksite (even if in the transfer process).
   - M Missing – cannot be found. Use this status code for outdated Software-License if no longer installed on equipment at the worksite. Attach an attest letter* if the item was not missing last year.
   - S Stolen - Attach a copy of the police report which shall include the asset # and/or serial # and must be signed by the Property Custodian (refer to Admin. Procedure 7300, Section B. 5). DO NOT mark missing items as stolen or send police reports for missing assets.
   - T Transferred to another worksite utilizing the online transfer system and no longer located at your worksite.
   - R Out for repair - Attach a copy of the work order.
   - L Out on loan to another site - A Property Loan Form should be maintained at the worksite for each item out on loan. Copies are not required to be attached to the inventory report. These forms must be renewed annually and available for review upon request.
6. For items listed on the report, please provide any missing information (i.e. serial number or model number) and any corrections to existing information.
a. Missing serial numbers are to be added to the Asset Mgmt system by using panel J402. Use the following path and refer to the Asset Mgmt User's Manual, pages 15-17:
   i. Asset Mgmt
   ii. Update Asset Bldg/Room

7. Building and Room numbers are to be updated as well to help streamline future inventory processes.

8. Add any unlisted items to the last page of the inventory report. Your unlisted items might just be another site’s missing item. Such items include:
   a. Donated property not already listed and with a cost basis or market value of $1,000 or more. Please include all information.
   b. Tagged property not already listed. Please include all information.

   Attest letters should be included when all efforts to locate an item have been exhausted and the worksite would like to request that the item be removed from the inventory records. Each of these items should be marked with a Status Code of 'M' on the inventory report. Attest letters should:
   a. Be on the worksite’s letterhead
   b. Be from (and signed by) the property custodian
   c. Include
      1. Asset number and description
      2. Any information about where each item was last located and/or seen.
      3. Any information about the efforts taken to locate each item.
      4. Any information about the circumstances leading to each item’s disappearance.
      5. Any backup documentation that can support each item being permanently removed from the worksite by any means other than through Surplus. This can include a copy of a work order or a vendor purchase order showing the removal process was part of the service performed.

Be advised that your attest letters will be included with the property disposal lists submitted to the Board for all items less than 5 years old or whose original cost was $5,000 or more.

As a reminder, all District owned property should only be disposed of through the Surplus Warehouse so its removal can first be approved by the Board (refer to Administrative Procedure 7300, Section B. 7).

II. To submit the completed annual physical inventory count:

1. By Courier: Place the Property Custodian Inventory Certification Form, Inventory Report and any Attest Letters in the Interoffice Mail addressed to Property Control.

2. By Email:
   a. Scan the completed Property Custodian Inventory Certification Form, Inventory Report and any Attest Letters. Make sure all documents have been signed by the Principal or Department Head.
   (Note: Large inventory reports may need to be broken into parts for scanning purposes)
b. **Save** the scanned document(s) in .pdf format

c. The Property Custodian (Principal, Director, or above) must email the .pdf document to [PropertyControl@brevardschools.org](mailto:PropertyControl@brevardschools.org). Emails not sent by the Property Custodian will not be accepted as your site’s official submitted inventory.

3. All inventories, whether submitted via courier or email, are due to Property Control **no later than**:

   - **Elementary Schools**  
     [Provided annually via LTM]
   - **Middle Schools**  
     [Provided annually via LTM]
   - **Jr/Sr and High Schools**  
     [Provided annually via LTM]
   - **Departments/Alternative Sites**  
     [Provided annually via LTM]
Appendix D
Forms

All forms are located on the respective department’s website for school and department use unless otherwise indicated:

D-1: Property Purchase Form
D-2: Property Tag Confirmation Form – District - Prepared by Property Control
D-3: Property Tag Confirmation Form – Internal - Prepared by Property Control
D-4: Software Confirmation Form – Prepared by Property Control
D-5: Tag Replacement Form – Single
D-6: Tag Replacement Form - Multiple
D-7: Replacement Under Warranty Form
D-8: Property Loan Form
D-9: Property Inventory Certification Form
D-10: Distribution Center Request (DCR-1)
D-11: Surplus Property Disposal Justification Form – Prepared by Surplus Warehouse
THE SCHOOL BOARD OF BREVARD COUNTY, FLORIDA
PROPERTY PURCHASE FORM

CAPITALIZABLE ASSETS NOT PURCHASED WITH DISTRICT FUNDS
FURNITURE, EQUIPMENT, COMPUTER HARDWARE AND SOFTWARE

School/Department Name

Date

School/Department Number

Method of Acquisition:

Donation (market value of $1,000 or more)

Internal Accounts Purchase (cost of $1,000 or more)

Item Description (include model number, serial number and room number where item is located):


Quantity

Unit Cost/Value

Total Cost

Check #

Date Paid

Principal / Dept. Head

For items purchased from internal accounts, please include a copy of the check, purchase order and of the invoice.

Distribution:

Original - School Accounting / Property Control
Copy - Retain at School / Department
**SCHOOL BOARD OF BREVARD COUNTY**

**PROPERTY TAG CONFIRMATION FORM – DISTRICT**

**Site Name:** [ ]  
**P.O. Number:** [ ]  
**Cost Center:** [ ]

Attached are the applicable tags for your new fixed assets created from the above listed PO. These tags are being sent to your site on [ ] by [ ].

- Please tag all of the assets and fill in the requested information below for each asset.
- Please enter the serial # and bldg/room # for each asset in the Asset Management System using panel J402.
- Please complete the names, dates, and signatures at the bottom of the form.

The completed form is due back to Property Control no later than [ ] If you are unable to make this deadline please contact me immediately at extension [ ].

**Note for Computers:** Please affix these property tags to the CPU, not the monitor. If the computers were funded through "Tech Refresh" they may already be tagged by Educational Technology for their tracking purposes; however, these property tags must also be affixed to the computers for inventory tracking by Property Control.

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<th>ASSET #</th>
<th>SERIAL #</th>
<th>MODEL #</th>
<th>BLDG / RM#</th>
<th>DESCRIPTION</th>
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**ASSETS TAGGED BY:** [ ]  
[ ]  
**DATE:** [ ]

**PANEL J402 UPDATED BY:** [ ]  
[ ]  
**DATE:** [ ]

**PROPERTY CUSTODIAN APPROVAL:** [ ]  
[ ]  
**DATE:** [ ]

(revised June 2014)
SCHOOL BOARD OF BREVARD COUNTY
PROPERTY TAG CONFIRMATION FORM – INTERNAL ACCOUNTS

Site Name: ___________________________ P.O. Number: ___________________________
Cost Center: ________________________

Attached are the applicable tags for your new fixed assets created from the above listed PO. These tags are being sent to your site on __________ by ______________________.

- Please tag all of the assets and fill in the requested information below for each asset.
- Please enter the serial # and bldg/room # for each asset in the Asset Management System using panel J402.
- Please complete the names, dates, and signatures at the bottom of the form.
- Please attach a copy of the invoice(s).

The completed form is due back to Property Control no later than ___________. If you are unable to make this deadline please contact me immediately at extension _________.

Note for Computers: Please affix these property tags to the CPU, not the monitor. If the computers were funded through "Tech Refresh" they may already be tagged by Educational Technology for their tracking purposes; however, these property tags must also be affixed to the computers for inventory tracking by Property Control.

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</table>

ASSETS TAGGED BY: ___________________________ DATE: ___________________________

Print Name

PANEL J402 UPDATED BY: ___________________________ DATE: ___________________________

Print Name

PROPERTY CUSTODIAN APPROVAL: ___________________________ DATE: ___________________________

Signature of ___________________________ revised June 2014
SCHOOL BOARD OF BREVARD COUNTY
SOFTWARE CONFIRMATION

Site Name: ___________________________  P.O. Number: __________________
Cost Center #: _____________________

On __________ your site processed a receiver for the following software:

ASSET INFORMATION:
Asset No: ___________________________
Description: ________________________

VERY IMPORTANT: Because there is no asset to physically tag, you will not receive a property tag for this item. The item(s) WILL be placed on your active inventory, however, and must be accounted for in the same manner as all other furniture and equipment. Once the software or license becomes obsolete, contact Property Control for assistance in removing the item from your inventory.

If the above description does not clearly describe the software please provide additional information below:

________________________________________________________________________
________________________________________________________________________

Please list the asset number, description, and serial number of the device(s) (e.g., server, desktop computer) where the software is loaded:

________________________________________________________________________
________________________________________________________________________

Estimated useful life of the software in years: ____________ years.

Please return this original signed form to Property Control no later than _____________
If you are unable to make this deadline please contact _____________ immediately at extension _____________

Please keep a copy of this form and a copy of the purchase order with your asset records.

Approved:
PROPERTY CUSTODIAN ___________________________ DATE: _____________
Principal, Director or Above

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SCHOOL BOARD OF BREVARD COUNTY
PROPERTY TAG REPLACEMENT FORM
(SINGLE TAG REQUEST)

INSTRUCTIONS
1. To request a property tag replacement, fill out Section 1 of this form and e-mail it to Property Control.
2. Property Control will mail this form back to the requesting site’s property custodian with the replacement tag attached. At that time please complete the bottom portion of Section 2 and return it to Property Control.

SECTION 1 – PROPERTY TAG REPLACEMENT REQUEST

REQUESTING SITE: (School/Department NAME) __________________________
TAG REQUESTED BY (Your Name): __________________________

COST CENTER: (School/Department NUMBER) __________________________

Please send a replacement tag for asset # (Original tag number) __________________________

The item to receive this tag can be described as: ____________________________________________

The serial number on the asset is __________________________, the model number is __________________________

PLEASE LIST THE NUMBERS ON THE PHYSICAL ASSET, NOT THE NUMBERSRecorded IN ASSET MANAGEMENT.

The reason for requesting a replacement tag is:
☐ The tag is no longer attached
☐ The tag is no longer legible
☐ Pickup refused by Warehouse due to missing tag
☐ Other (please explain) __________________________

Submit

SECTION 2 – PROPERTY TAG REPLACEMENT CONFIRMATION

The tag is being sent to your site on __________________________ by __________________________.
Please affix the tag to the corresponding asset, complete the information requested below and return the form to Property Control no later than __________________________. If you are unable to make this deadline please contact me immediately at extension __________________________.

I, __________________________, have received the requested replacement tag and will assure
Signature of Property Custodian (Principal/Director or above)
that it is affixed to the correct asset either by myself or by a designee.

ASSET TAGGED BY: __________________________ DATE: __________________________
Printed name of person affixing tag Date tag was affixed to asset

Signature of person affixing tag
SCHOOL BOARD OF BREvard COUNTY
PROPERTY TAG REPLACEMENT FORM
(MULTIPLE TAG REQUESTS)

INSTRUCTIONS
1. To request a property tag replacement, fill out Section 1 of this form and e-mail it to Property Control.
2. Property Control will mail this form back to the requesting site’s property custodian with the replacement tag attached. At that time please complete the bottom portion of Section 2 and return it to Property Control.

SECTION 1 – PROPERTY TAG REPLACEMENT REQUESTS

REQUESTING SITE: (School/Department NAME) ____________________________ BY (Your Name): ____________________________

COST CENTER: (School/Department NUMBER) ____________________________

Please send replacement tags for the assets listed on the attachment. There are (number) ___ assets listed on the attachment.

SECTION 2 – PROPERTY TAG REPLACEMENT CONFIRMATION

The tags are being sent to your site on _______ by ______________. Please affix the tags to the corresponding assets, complete the information requested below and return the form to Property Control no later than ________.

If you are unable to make this deadline please contact me immediately at extension ________.

I, ____________________________, have received the requested replacement tags and will assure that they are affixed to the correct assets either by myself or by a designee.

ASSETS TAGGED BY: ____________________________ DATE: ________________

Signature of Property Custodian (Principal/Director or above) Printed name of person affixing tags

Date tags were affixed to assets

__________________________________________________________

Signature of person affixing tags

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### Tag Replacement Form – Multiple

**PROPERTY TAG REPLACEMENT FORM**

**REQUESTING SITE:** [School/Department Name]  
**COST CENTER:** [School/Department Name]  

**Please list the numbers on the physical assets, not the numbers recorded in Asset Management.**

<table>
<thead>
<tr>
<th>Asset Number</th>
<th>Description</th>
<th>Serial Number</th>
<th>Model #</th>
<th>Reason for Replacement Tag</th>
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SCHOOL BOARD OF BREVARD COUNTY
REPLACEMENT UNDER WARRANTY FORM

INSTRUCTIONS
1. To inform Property Control about a tagged asset’s replacement under warranty exchange, fill out Section 1 of
   this form and e-mail it to Property Control.
2. Property Control will update Asset Management and create a replacement tag for the new asset. Property
   Control will mail this form back to the requesting site’s property custodian with the replacement tag attached.
   At that time please complete the form and return it to Property Control.

SECTION 1 – REPLACEMENT UNDER WARRANTY INFORMATION

SITE: (School/Department NAME) ____________________________

COST CENTER: (School/Department NUMBER) _____________ ASSET NUMBER: ______________

ORIGINAL SERIAL NUMBER: ________________________________

NEW SERIAL NUMBER: ________________________________

Please include all pertinent information about the warranty exchange:

________________________________________________________________________

________________________________________________________________________

Please attach available backup documentation about the warranty exchange.
Backup documentation is included:  ☐ Yes ☐ No

Explanation of why no backup documentation is included:

________________________________________________________________________

Submit  Click the submit button to attach this form to an email.
Please include backup documentation as a separate attachment.

SECTION 2 – PROPERTY TAG REPLACEMENT CONFIRMATION

The tag is being sent to your site on ____________ by ____________. Please affix the tag to the corresponding
asset, complete the information requested below and return the form to Property Control no later than ____________.
If you are unable to make this deadline please contact me immediately at extension ________.

__________________________________________, have received the requested replacement tag and will assure

that it is affixed to the correct asset either by myself or by a designee.

ASSET TAGGED BY: ______________________________ DATE: __________

Printed name of person affixing tag  Date tag was affixed to asset
SCHOOL BOARD OF BREVARD COUNTY

PROPERTY LOAN FORM

IMPORTANT - THIS FORM MUST BE COMPLETED IN ITS ENTIRETY BEFORE ANY EQUIPMENT CAN BE LOANED TO ANYONE.

I, the undersigned borrower, agree to be responsible for the equipment listed below. I agree to replace or repair at my own expense any loss or damage to this equipment while it is loaned out to me, to the satisfaction of the School Board of Brevard County.

I, __________________________, hereby borrow as agreed above, the following:

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<tr>
<th>(Description)</th>
<th>(Property Number)</th>
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It will be located at __________________________, (Name or street address of location)
and will be subject to personal use.

Expected Date of Return:

Must be no later than last day of school for students.
Must be no later than June 30, 2016 for employees.

(Printed name of Borrower or Parent/Guardian)  (Signature of Borrower or Parent/Guardian)

(Date Borrowed)  (Signature of School Administrator or designee approving loan of equipment)

(Date Returned)  (Signature of School Administrator or designee upon return)
PROPERTY CUSTODIAN INVENTORY CERTIFICATION

Please return with your completed school inventory
Please print (except where signatures are required)

Please Use Blue Ink

School/Department: [Complete Name of School/Department]  Site Number: 

I, [Principal, Director or above], am the [Title]
of [School / Department] and am the Property Custodian of all inventory at my worksite. As the Property Custodian, I certify that a 100% physical inventory count was completed on the following date: [ ] . I understand that attest letters for all missing items less than 5 years old or whose original cost was $5,000 or more will now be submitted to the Board with the property disposal lists.

I was assisted with this physical inventory count by the following personnel on my staff:
(Please use an extra sheet for additional signatures if needed)

Name: [ ] Signature: [ ]
Name: [ ] Signature: [ ]
Name: [ ] Signature: [ ]
Name: [ ] Signature: [ ]

Please provide your site’s designated property inventory contacts in case questions arise:

1st Contact Name: [ ]  2nd Contact Name: [ ]
3rd Contact Name: [ ]  4th Contact Name: [ ]

Signature of Property Custodian*  Signature of Property Custodian listed above

* Forms not signed by the Property Custodian will be returned for the appropriate signature.
### Property Control Manual Appendices

#### Distribution Center Request (DCR-1)

**SCHOOL BOARD OF BREVARD COUNTY**

**Distribution Center Request (DCR-1)**

*All capital asset transfers MUST be completed online through CrossPointe*

**FROM**
- Sending Site Name and Number
- FROM Site contact: Phone #: 

**TO**
- Receiving Site Name and Number
- TO Site contact: Phone #: 

**List items to be transferred/delivered:**

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**Print Name:** 

**Sign:** 

**Date:**

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**Print Name:**

**Sign:**

**Date:**

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**Print Name:**

**Sign:**

**Date:**

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*Fill in required fields. Print 2 copies. Sign in BLUE ink. Forward both signed copies to the Distribution Center for completion.*
SURPLUS PROPERTY DISPOSAL JUSTIFICATION FORM

The School Board requires an explanation as to why an item is determined to be surplus when it falls into one of the following categories:

1. Less than 5 Years old
2. Original cost was more than $5,000
3. Has not yet met its life cycle

When disposing of an item that applies to any of these three areas, this form must be completed in its entirety, signed by the appropriate department head(s), and returned to the Warehouse (attention Sandy Kimple) before a pick-up date will be scheduled.

Please complete all areas below, giving as much detail as possible:

SECTION A: TO BE COMPLETED BY THE WAREHOUSE

Asset #: __________________ Description of Item: __________________
Acquisition Date: __________ Original Cost: __________ Current Book Value: __________ Life Cycle: __________

SECTION B: TO BE COMPLETED BY THE SITE ADMINISTRATOR

1. Check (v) one of the following boxes:
   - Item(s) are uneconomical to repair or Item(s) obsolete & no longer usable

2. It is required to attach supporting documentation or complete the details section below. Your items will not be picked up if this information isn’t provided.

3. Details:

SECTION C: TO BE COMPLETED BY THE APPROPRIATE AREA SUPERINTENDENT OR DIVISION HEAD

Administrator Name (print) / Title __________________ Administrator Signature __________________ Date __________

Administrator Name (print) / Title __________________ Administrator Signature __________________ Date __________

Administrator Name (print) / Title __________________ Administrator Signature __________________ Date __________

SECTION D: TO BE COMPLETED BY SANDY KIMPLE, WAREHOUSE SUPERVISOR

Documentation Reviewed / Submit Request to Board for Approval: __________________

Sandy Kimple, Supervisor, Warehouse Services / Date __________

Office Of Purchasing & Warehouse Services
Phone: (321) 633-1000 Ext 645 - Fax: (321) 633-3618
Warehouse: (321) 633-3680 Ext 14100 - Fax: (321) 633-3698