



EAST BATON ROUGE PARISH SCHOOL SYSTEM

# Property Control Manual

Revised as of: January 2011

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***P***ROPERTY ***C***ONTROL ***M***ANUAL  
*OF*  
***East Baton Rouge Parish School System***

## **PURPOSE**

The purpose of Property Control is to provide internal control of properties owned by East Baton Rouge Parish School Board. These properties include assets valued at \$5,000 or greater, as well as items deemed to have a "street resale value" at a cost of \$300 or greater, which are purchased or donated to the school system. While Property Control maintains control of property to insure compliance with school board policies and state laws, Principals, Directors and or Supervisors are directly responsible for the inventories at their locations.

This manual is a compilation of the procedures and responsibilities related to the fixed assets at your location. Each section contains step-by-step instructions, with sample copies of pertinent documents included.

Please read the information provided carefully. If you have any questions, please do not hesitate to contact the Property Control Department at (225) 922-5436, (225) 922-5470 or (225) 922-5550.

## I. OBJECTIVE

The objective of Property Control is to maintain an accurate inventory record of each school location of the East Baton Rouge Parish School System. This data base is maintained at the Central Office and is used for insurance, maintenance, and reporting purposes. To ensure the validity of the data, each location is required to verify the inventory reports for accuracy. As a follow-up, the Internal Auditor's Office will perform random sample audits of selected locations for compliance. In addition, the data is audited by a private accounting firm to test for conformity to Generally Accepted Accounting Principles (GAAP).

## II. IMPORTANCE OF PROPERTY CONTROL

Property Control is important for three major reasons: Insurance, Maintenance, and Legislative compliance.

- Insurance

If there is a fire or theft at a location, only the assets that are currently on the property control system will be repaired or replaced. Also, an incorrect inventory can cause the School Board to over or under insure the fixed assets of the East Baton Rouge Parish School System.

- Maintenance

The Physical Plant is allocated funds each year for the repair and/or replacement of equipment. **Maintenance will not repair/replace any item not properly tagged by Property Control.**

- Legislative Compliance

Finally, it is required by State Law that the School Board keep an updated inventory at each location. In addition, both internal and external auditors test the inventory for compliance on an annual basis. The East Baton Rouge Parish School Board is responsible for the care of all fixed assets purchased with State or Federal funds.

### III. DEFINITION OF FIXED ASSETS

Fixed assets are land, buildings, machinery, equipment and furniture that have a cost of \$5,000 or more and have a useful life of more than one year.

The major characteristics of fixed assets are:

- Lasts more than one year;
- It is nonexpendable; that is, if damaged or worn out, it can be repaired without being replaced;
- They do not lose their identity through incorporation into a different or more complex unit or substance;
- Exceeds \$5,000.00 in value.

#### Examples of fixed assets are:

Televisions	Video Cameras
VCRs	Activboards
Ovens	Sewing Machines
Document Cameras	Computers
Printers	Refrigerators
Servers	Buses
LCD Projectors	Lawnmowers
Band instruments	Automobiles

#### Examples of items which “are not” fixed assets:

Instructional Supplies	Maps
Glue	Paper
Dishes	Books
Pencil sharpeners	Waste Baskets
Staplers	Drapes
Food	Utensils

#### Examples of items declared to have a “street resale value” (cost of \$300 or greater)

Communications Equipment (*radios, cellular phones, etc.*)  
Data Processing Equipment (*typewriters, scanners, copiers, fax machines*)  
Computer Equipment (*servers, laptops, mini-laptops, netbooks*)  
Production/Broadcast Equipment (*videoconferencing, editing, camcorder*)  
Band/Stereo Equipment (*CD players, microphones, mixers, risers*)  
Audio Visual Equipment (*projectors, Activboards, DVD/VCR/television combos*)  
Musical Instruments (*pianos, tubas, percussion, bassoons, wind, etc*)  
Other Office Equipment (*duplicators, printers, microfiche readers*)

## IV. TAGGING INSTRUCTIONS

### A. DETERMINING ASSETS TO BE TAGGED

The School Board will continue to adopt the state threshold for tracking capital assets which includes all assets with a unit cost of \$5,000 or more, with the exception of the items deemed to have a "street resale value." These items will be tracked at a value of \$300 or greater. The assets that are inventoried are expected to provide service for at least one year and, therefore, require positive identification by tagging.

Exceptions to the rule of tagging are land improvements, buildings and fixed equipment. These assets are not mobile and are usually the result of contracted, on-site construction rather than the normal purchasing procedure. An example of fixed equipment is a new furnace – once it is installed, it is considered part of the building. Even though they do not require a tag, they will still be listed on the inventory.

Assets which fall in the category of *less than \$5,000* may be tagged with a "**generic orange**" tag that identifies the item as property of the East Baton Rouge Parish School Board. **Assets that will be tagged with a Property Control # fall into one of the following classes:**

**Asset Chart for Property Control #'s**

Furniture & Fixtures	Desks, credenzas, cabinets, bookshelves	\$5,000
Equipment	Custodial equip, maintenance equip	\$5,000
Communications Equipment	Radios, cellular phones	\$300
Data Processing Equipment	Typewriters, scanners, copiers, fax	\$300
Other Office Equipment	Duplicators, printers, microfiche readers	\$300
Classroom Computer	Computer system (monitor, harddrive)	\$300
Production /Broadcast	Video conf, editing equip, camcorder	\$300
Audio Visual Equipment	Projectors, cameras, VCRs, television	\$300
Band/Stereo Equipment	CD players, microphones, mixers, risers	\$300
Appliances	Microwave, stove, refrigerator, washer	\$5,000
Cafeteria Equipment	Freezer, cooler, warmers, ovens	\$5,000
Lab Equipment	Scientific apparatus	\$5,000
Athletic Equipment	Weight machines, track, football, etc.	\$5,000
Outdoor Phys Ed Equipment	Playground equip	\$5,000
Stage/Auditorium Equipment	Audio equipment, lighting, props	\$5,000
Music Inst & Accessory	Piano, percussion, brass	\$300
Tools & Machinery	Shop tools, maintenance tools	\$5,000
Mobile Equipment	Tractors, Front-end loaders, forklifts	\$5,000
Grounds Equipment	Tractors, mowers	\$5,000
Licensed Vehicles		
	Bus, 2-Ton Delivery Trucks	\$5,000
	Passenger trucks, vans	\$5,000
ROTC Equipment	Rifles, Guns, etc...	\$5,000
Special Ed Equip	Wheelchairs, OT/PT equip, beds, chairs	\$5,000

## B. PLACEMENT OF TAGS

In implementing the tagging system, one of the prime considerations should be uniformity of tag locations. Ease of access in the application of the tag, as well as subsequent inspection, should be the guiding principle. A tag should not be applied such that it defaces an asset. It also should not be affixed in a place that is difficult to reach or see.

- **Computers and Office Equipment** (includes monitors, CPUs, copiers, printers) – tag should be placed on the rear of the equipment as close to the manufacturer's tag as possible
- **Furniture** (includes desks, credenza, chairs, etc) – the placements of the tags vary with the different types of furniture. Desks and credenzas should be tagged on the inside of the right pedestal. *It is important to remember not to tag these assets on the sides because the tags will not be accessible if the asset is moved next to something.* File cabinets should be tagged on the upper right side of the front of the cabinet for the same reason. Chairs should be tagged on the stem of the pedestal base. Other miscellaneous types of furniture should be tagged in a consistent manner without detracting from the asset's appearance, but allowing for easy identification of the item during inventory, transfer, or disposition.
- **Automotive and Shop** (presses, saws, lathes, etc) – Tag should be placed where a minimum of grease, oil, vibration, and heat will be encountered. Tags are intended to last the useful life of the item, so care should be taken when selecting the spot to tag. Be sure the tag is easy to locate. Ideally it should be near the manufacturer's plate.
- **Engineering and Scientific** (microscopes, lab ovens, meters, etc) – This equipment should be tagged on the surface next to the manufacturer's plate. For larger, less mobile equipment, the tag should be placed on the face near the manufacturer/model identification for easy access.
- **Grounds and Maintenance** (mowers, vacuums, etc) – Place tags near the manufacturer's I.D. plate if possible. Again, the tag should not be placed in an area exposed to grease, oil, vibration, or heat.
- **Appliances** (stoves, refrigerators, microwaves) – Tag appliances on the top right corner of the face. Do not place tags on the side of the asset because it will be difficult to reach when next to a wall or other appliance. If the tag defaces the asset when in the top corner, it is also acceptable to place the tag at the bottom right corner of the face.

## C. REPLACEMENT OF TAGS

If an asset is observed to have a tag that is defaced to the point where number recognition is impossible, a request should be made to have the asset retagged by submitting the "**FIXED ASSET RE-TAG FORM**" to Property Control.

# **ACQUISITION OF ASSETS**

(purchase of assets)

Newly acquired fixed assets include:

- Items purchased through the East Baton Rouge Parish School Board Purchasing Department
- Items purchased with school funds (fundraisers, candy sales, PTA, etc.)
- Items purchased or given to East Baton Rouge Parish School System through an outside grant
- Items donated to schools and departments by external sources

## **A. ITEMS PURCHASED - EBR PURCHASING DEPARTMENT**

### **1. Property Control**

- Prepare an “*ACQUISITION OF FIXED ASSET FORM*” along with tags to be submitted to the school for each item requiring a property control tag

### **2. School**

Once the school receives the “*ACQUISITION OF FIXED ASSET FORM*,” the following information should be verified and completed, and the Asset should be tagged

- |                    |                    |
|--------------------|--------------------|
| a) Manufacturer    | e) Room Number     |
| b) Serial Number   | f) Location Number |
| c) Model Number    | g) Date Received   |
| d) Building Number |                    |

**Note: Please utilize your official school map for the building and room numbers. Please do not put Library, Computer Lab, Gym, etc.**

The white copy of the completed form should be forwarded to *Property Control*.

### **3. Property Control**

- Update Inventory database with corrected information from the Acquisition Form that was returned to property control from location.

**NOTE:** If your school/department has received new assets but not the forms and tags to add the items to your inventory, please contact the Property Control Department.

**B. ITEMS PURCHASED - SCHOOL OR GRANT FUNDS OTHER THAN CENTRAL OFFICE FUNDS**

**1. School**

- Fill out "**PURCHASED FIXED ASSET FORM**"
- Indicate purchase order number (if applicable)
- Attach a copy of the receipt, invoice, and check
- Forward completed form (with authorized signatures) to Property Control

**2. Property Control**

- Process form and assign property control tag
- Tag and a copy of processed form will be forwarded to the school

**C. DONATED ITEMS**

**1. School**

- Contacts the Property Control Office with specific information regarding the donated property

**2. Property Control**

- Submit a work order to *Maintenance Department* requesting evaluation of donated items

**3. Maintenance Department**

- Evaluate donated item
- Determine if it is cost effective to be put on property control.  
**Their decision is final.**
- Arrange for delivery of donated equipment

Once Maintenance approves the donated items:

**4. School**

- Forward the completed "*Acknowledgement of Donated Fixed Asset Form*" to Property Control (make sure that donor's section is complete, including donor's signatures)

**5. Property Control**

- Issue a property control tag and forward a copy of the form to the school

# **REMOVAL OR LOSS OF ASSETS**

(disposal of assets)

In order to remove an obsolete, broken, non-repairable, missing or stolen item from your inventory, the following procedures must be adhered to:

## **A. OBSOLETE, BROKEN OR NON-REPAIRABLE ASSETS**

Below are the procedures that **must** be followed to remove an obsolete, broken or non-repairable item from your inventory:

### **1. Principal or Department Head**

- Identify the fixed asset that is beyond repair or obsolete.
- Complete the *Fixed Asset Disposal Form*.
- Sign the *Fixed Asset Disposal Form*.
- Prepare a *Fixed Asset Pick-up Request Form*, and attach it to the *Fixed Asset Disposal Form*.
- Fax the forms to the Aramark.

*Under no circumstances should a school dispose of items themselves (i.e., throw in dumpster, give to an employee, sell, etc.).*

### **2. Aramark**

Once the Aramark receives the *Fixed Asset Disposal Form* and attached *Fixed Asset Pick-up Request Form*, they will perform the following steps:

- Create a Work Order Number
- Pick up the item to be disposed.
- Evaluate the item and make a **final** decision to classify the asset. Assets may be classified into one of the following four categories:

- **Obsolete and Disposable**

Aramark will send the item to Sharp Station for proper disposal

- Proper disposal means sold through public auction or public bid process.
- **The items cannot be given to School System employees.**
- Disposition of surplus property will be in adherence with the requirements of Louisiana state law.
- Aramark will complete a *Fixed Asset Disposal Form* and forward it to Property Control to remove the item from the school's inventory.

- **Obsolete and Retained for Parts**

Aramark will keep the item and use it for parts

- Aramark will complete a *Fixed Asset Disposal Form* and forward it to Property Control to remove the item from the school's inventory.
- Property Control will document the status of the asset
- Aramark will ensure that the asset is maintained for its intended use for parts and not utilized in its original state

- **Repaired and Replaced**

If an item is sent to Aramark to be repaired and they determine that the item should be replaced, Aramark will prepare a *Fixed Asset Replaced by Physical Plant Services Form*. This form

- Gives Property Control
- requests a property control tag for the replacement asset.

Aramark sends the form to Property Control so that the inventory records can be updated.

- **Repaired and Held by Aramark for Redistribution**

- Aramark will complete a *Fixed Asset Transfer Form* to remove the asset from the school's inventory and to designate the asset as being held by Aramark for redistribution.
- When the item is distributed to a school or department, Aramark will complete a *Fixed Asset Transfer Form* and send it to Property Control so that the inventory records can be updated.

## **B. MISSING ASSETS**

Below are the procedures that **must** be followed when assets are discovered to be missing and there is no evidence of a physical break-in:

### **Principal or Department Head**

- Conduct a thorough search of the premises.
- Review any sign-out log. Interview the person to whom the item was assigned concerning the last known location of the item.
- If the item cannot be located after the search and interview. The item should be considered stolen and the Stolen Assets steps should be completed.

## **C. STOLEN ASSETS**

Below are the procedures that **must** be followed in the event of the theft of a fixed asset:

### **Person Discovering the Theft**

The person who discovers the theft must immediately report it to the school principal or department head.

### **Principal or Department Head**

- Conduct a thorough search of the premises for the missing asset.
- Review any sign-out logs maintained on the asset.
- Interview the person to whom the asset was assigned regarding the asset's last known location.
- File a police report.

Note: If a police report is not filed within three business days of the date the asset was determined to be stolen, then the school will be responsible for reimbursing the School System the cost of the stolen asset through its school account.

- Complete a *Stolen Fixed Asset Form*, attach a copy of the police report, and forward the documents to the appropriate Assistant Superintendent.

### **Assistant Superintendent**

- Review and then, if appropriate, approve *Stolen Fixed Asset Form*.
- Forward the *Stolen Fixed Asset Form* to Property Control.

## **Property Control**

- Property Control will remove the asset from the inventory and determine if the school is responsible for reimbursing the School System for the cost of the asset by reviewing the police report and statements from the school.
- If the Property Control Department determines that the school or the employee of the school is responsible for reimbursement, then a memo will be sent to the Assistant Superintendent of that school for approval of the funds to be reimbursed. The memo will disclose why it was determined the employee or school is responsible for reimbursing the School System with supporting documentation. The Property Control Department will determine responsibility by the following:
  - If the asset was removed from the school, whether signed out or not, and brought home by an employee, then the employee will be responsible for reimbursing the School System for that asset. When an employee signs out an asset they are responsible if the asset is lost, stolen or misplaced.
  - Each school is responsible for securing all assets purchased by the School System. If it is determined through the police report and through the information submitted by the school the asset was not secure, then the school will be held accountable and will reimburse the School System for that asset.

# **TRANSFER OF ASSETS**

(internal/external)

Because the fixed asset system tracks items by location, it is essential that transfers of fixed assets be reported and recorded.

Transfers may be classified in two areas:

- **INTERNAL** – within a school location (does not leave the school premises)
- **EXTERNAL** – between school locations or other sites (leaves the school premises)

If a school moves an item within the school premises, an “***INTERNAL MOVING OF FIXED ASSET FORM***” must be completed.

## **1. School**

- Complete the “***Internal Moving of Fixed Asset Form***”
- Forward completed form to **Property Control**
- School should maintain a copy for their records

## **2. Property Control**

- Process changes in System

If a school moves an item outside the school premises, a “***FIXED ASSET TRANSFER FORM***” must be completed.

## **1. Sending School**

- Complete the sending location section of the “***Fixed Asset Transfer Form***”
- Forward completed form to **Receiving Location**

## **2. Receiving Location**

- Complete the receiving location section of the “***Fixed Asset Transfer Form***”
- Forward completed form to **Property Control**

## **TRANSFER OF FIXED ASSETS (cont)**

### **3. Property Control**

- Process changes in System
- Copy will be forwarded to each School

**Note:** If an employee requests permission to take an item owned by the EBR School System offsite, they must complete an ***“OFFSITE BORROWED FIXED ASSET FORM.”***

**THIS FORM MUST BE SIGNED BY THE PRINCIPAL, DIRECTOR OR DEPARTMENT HEAD.**

Once completed, this form covers the item until it is returned to the school site.

If the form ***is not*** completed, and the item is damaged, lost, or stolen, **the individual who has the item in their possession is responsible for the replacement/repair of the item!**

## **Special Education Property**

Property purchased for Special Education programs in the East Baton Rouge Parish School System have a special set of rules for property control purposes.

Federal mandate stipulates that all property purchased for specific use by special education programs must be in place in the schools within ten (10) working days.

Procedures for tagging special education equipment are listed below:

### **1. Special Education**

- Generate to obtain property control tags. (*equipment will be listed as part of the inventory of the special education department*)
- Equipment will be assigned to a specific school location
- A **Fixed Asset Transfer Form** will be prepared and submitted for authorized signatures.
  - (a) must be signed by the Special Education Resource Center or the Assistive Technology Lab as the sending location
  - (b) must be signed by the principal of the school as the receiving location
- Transfer form is routed to Property Control

### **2. Property Control**

- Input form in system
- Distribute copies to sending location and receiving location

### **3. School**

- Must have a completed copy on file at the school site
- All Special Education equipment located at a specific school site is considered to be a **part of the school physical inventory** and must be accounted for as such.

Special Education Equipment should be used for its intended purpose only.

Any item purchased for Special Education may be affixed with a special tag identifying it as "***Property of Special Education.***" This tag is for identification purposes only. It does not qualify as an official property control tag.

The equipment must be kept at the location shown on the Fixed Asset Transfer Form for auditing purposes. If the equipment is moved, the following forms must be completed:

**1. Equipment Changes Rooms at the School**

- An **Internal Moving of Fixed Asset Form** should be completed
- A copy should be kept on file at school and the original routed to Property Control

**2. Equipment Authorized to be Moved from School Site (by teacher or student)**

- An **Offsite Borrowed Form** must be completed
- A copy should be kept on file at school and the original routed to Property Control
- If the equipment is kept for **longer than 24 hours**, a **Fixed Asset Transfer Form** must be completed also

**3. Teacher Changes School Location**

- A **Fixed Asset Transfer Form** must be filled out
- Equipment must be returned to Special Education (SERC or Assistive Technology Lab)
- Teacher must go to Special Education to pick up equipment
- When equipment is re-assigned, a new **Fixed Asset Transfer Form** must be completed

Step by Step  
**INSTRUCTIONS**  
How to perform an inventory

When an inventory is being done, all assets listed on the inventory printout should be physically verified, checking for accuracy of serial & model numbers, as well as building & room numbers. Fixed assets include land, buildings, machinery, furniture, and equipment. Only assets originally valued \$5,000 or greater than, as well as items deemed to have “street resale value” at a cost of \$300 or greater must be considered (See asset chart in manual on page 6). The inventory coordinator may find assets at the location that are not on the inventory list as well as notice items on the inventory list that are not at the location. Careful research is required to explain the absence of fixed assets. All changes and/or corrections should be noted and the appropriate form should be completed. *Appropriate forms are required for official approval to make changes and for auditing purposes.*

***USEFUL MATERIALS REQUIRED***

1. **Step by Step Instructions of how to perform an Inventory**
2. **Property Control Manual**
3. **Master & Working copy of Inventory**
  - Sorted by Responsibility Code
  - *Work Copy* – used to physically verify all assets at your location and make appropriate changes to building, room, serial, model, etc.
  - *Master Copy* – Transfer all changes from the working copy to the master copy and forward the inventory with corrections, forms, and a signature of the Principal or Department Head.
4. **School Location Map**
5. **Property Control Forms**

I. **ACTUAL PHYSICAL INVENTORY PROCEDURES**

- Select a person to coordinate the inventory process.
- Read through the information provided before getting started.
- Identify the “Working Copy” of the inventory report.
- Locate the building and the room number to be inventoried. Use the school map if you are unsure regarding the location.
- Identify each item by verifying the property control tag affixed to the item (should be a red, blue, yellow, green, or a white tag).
- Look up the building and room number you are in on the *working copy* by building and room numbers.

A. If the item has a property control tag, do the following

- Verify that the item is on the inventory report.
- If the item **is found** and **in the correct location on the inventory report**, place a check mark in the notes field (on the blank line).
- If the item **is found**, and the **location is not correct on the inventory report**, write the correct building number and room number in the notes field (on the blank line).
- If the item is **not found** on the inventory report, identify the serial number and model number of the item. Scan the report for these numbers.
- If the item is found, repeat previous steps.
- If item is not found, place item on after you have completed the **Inventory Adjustment Form**. Property Control will add it to your inventory if deemed a functioning asset.

B. If the item does not have a property control tag, do the following

- Examine the item for a serial number, model number or some other identifying number. Verify if these numbers appear on the inventory report.
- If the item **is located**, verify the location. If the location is correct, place a check mark in the notes field. If the location is not correct, write the correct building number and room number in the notes field.
- If the items do not appear on the inventory report, determine if the item meets the criteria for property control tags. Consult the **Property Control Manual** for the definition.
- If the item meets the criteria, place item on the **Inventory Adjustment Form**, property control will research the Asset with Serial number, Model number.

C. Neatly transfer all items to the “Master Copy.” All lines in the notes field should contain either a check mark or a location correction.

D. After all corrections have been entered, if the inventory report still contains items that have not been located (blank lines in the notes field), do the following:

- Check to see if the items belongs in the following categories:
  - Missing
  - Stolen
  - Transferred to another location
  - Sent to Physical Plant Service for maintenance
  - Disposed/Retired from Service
- The items that fall into the Missing category, check the Responsibility Code (the party who funded the money for the purchase of the asset) and contact that office to inquire about the missing asset.

Library Service	Cathy Seal	226-7610
Pre-K Grant	Bobbie Robertson	355-6197
School Food Service	Jimmy Cooper	226-3767
Special Education	Kathy Stelly	929-8727
Student Activities	Ken Jenkins	929-8759
Title 1	Claude Jackson	922-5559
Vocational Education	Peter Oelschlaeger	267-6483

- If the Responsibility Code Party **did remove** the asset, ask for the new location name and number to record on the Inventory Report.
- If the Responsibility Code Party **did not remove** the asset, then you must decide if the asset is one of the following: stolen, being repaired, or disposed of.
- Complete the appropriate form accordingly if it has not already been done.

***PLEASE NOTE THAT ITEMS RECENTLY PURCHASED THROUGH THE ACCOUNTING SYSTEM OR TAGS RECENTLY REQUESTED MAY NOT BE ON THE INVENTORY LIST.*** Depending of how an item was purchased, it may take up to 30 days to receive tags from Property Control.

1. SPECIAL CONCERNS:

- Verify that all fixed assets are in a “true building.” The building numbers where fixed assets are located **must match** with the building listing of the “*Fixed Asset Insurance Data Report Description*” **to be insured.**
  - Check the inventory listings for duplications or fixed assets being listed more than once. Request changes of these errors in writing.
2. After each asset on the list has been verified and each item at the location that is not on the list has been added, finalized the “*Master Copy*.”
3. Neatly transpose all changes and corrections onto the Master Copy, completing the appropriate forms. Return the original “*Master Copy*” to Property Control with the signature of the Principal or Department Head. **The report will be returned if it does not have an official signature.** After the completion of a detailed inventory, Property Control will send the location an updated inventory list showing the changes requested.

## PROPERTY CONTROL COMMONLY ASKED QUESTIONS?

?? ?? ?? ?? ?? ?? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?

1. When does Property Control originate the paperwork for receiving property control tags and when does the location?

When an asset has been purchased through the Accounting Department of East Baton Rouge Parish School Board (EBRPSB) using a fixed asset tag account number, a form will be completed and tag issued directly from Property Control. If a fixed asset tag account number was not used and/or the asset was purchased through the location's checking account, a Purchased Fixed Asset form should be completed by the location. If the item was directly donated to the School System, an Acknowledgment of Donated Fixed Asset form should be completed by the location.

2. Do I have to complete a form for every request?

Yes. For auditing and records purposes a form should be completed for each request. For large quantities, there are multiple forms to list several items at a time. **Official property control department forms must be used or requests may be returned.** In addition, changes or concerns should be put in writing to assure accurate response. Most of the forms have been revised and are user friendly with instructions on them. A summary of the forms available and its purpose may be obtained from Property Control.

3. Why aren't items we have had at our location for years not on the inventory list?

*One of the following may apply:*

1. Although purchased through the Accounting department of EBRPSB, the item was purchased with a non-fixed asset tag account number. Therefore, the item did not appear on the "Control Report" which lists items purchased with fixed asset tag account numbers, monthly.
2. Historically, tags were issued prior to being placed in the system. Data was not placed into the system until the paper work was returned from the location. Perhaps the paper work was misplaced or lost in the "pony".
3. An official form to "transfer" the asset from its original location may not have been completed. The item may be in the "data base" but not at your location. This should be researched before completing a donated fixed asset form.

4. Why do we have to update the location's inventory? Is an inventory necessary?

State law requires an inventory at least every other year. However, it is wise to maintain an updated inventory for auditing and insurance purposes. EBRPSB will not repair an asset that is not on your location's inventory. In addition, assets that are not appropriately placed at a location and existing building are not insured. To eliminate these problems and to control possible theft, it is necessary to maintain an updated inventory.

5. What assets are insured and what is the coverage?

East Baton Rouge Parish School Board has a \$100,000 deductible per occurrence. This deductible must be reached before coverage is effective. Therefore, the School System does not replace assets that are purchased outside of the general fund budget. However, the School System will assist in repairing broken assets purchased with "special or raised" funds as long as it is cost effective to do so. If the item is used and there is no proof that it was purchased "brand new", the location will have to cover the cost of parts. Funds are set aside for the replacement of fixed assets purchased with general fund. However, these funds are limited budgeted funds and are managed by Physical Plant Services based on the need and cost.

6. What is the procedure for the acceptance of donated items?

Initially, Property Control should be contacted with the specific information regarding the equipment to be donated. Property Control will contact the donor and make arrangement for the item(s) to be evaluated for usability before accepting them. An **Acknowledgement of Donated Asset Form must be completed upon delivery.** Donated items will not be replaced by the School System and the cost for parts will not be covered if the items were not "brand new" when received (this must be proven).

7. Who is responsible for completing and maintaining the inventory of fixed assets at our location?

Principals or Directors of locations are responsible for it's location's inventory. However, the manager may designate a responsible person to supervise the completion and maintaining of the locations' inventory. It is suggested that one-person coordinate the inventory and the following staff be involved (next page):

## Suggested Personnel Participation for Inventory

<u>Position</u>	<u>Responsibility</u>
Assistant Principal or Secretary.....	Coordinate
Secretary .....	Main Office Equipment & Furniture
Librarian.....	Audio Visuals & Computer Equip. & Furniture
Lunch Room Director.....	Food Service Equipment & Furniture
Band Director.....	Band Equipment & Furniture
Computer Teacher.....	Computer Equipment & Furniture (if Librarian does not handle)
Special Education Teacher.....	Special Ed. Equipment & Furniture
Coach/P.E. Instructor.....	Sport & P.E. Equipment & Furniture
Teachers.....	Class room furniture & permanent equipment
Custodian.....	Grounds/Maintenance Equip. & Storage items

### 8. Will Special Education equipment be on our location's inventory?

Yes, it will be. If a piece of equipment is purchased with Special Education funds, but assigned to a specific school location for a designated period of time, as long as the equipment is housed at the school, it will appear on the school's inventory. When the school returns the equipment to the Special Education Department, a transfer form is completed to place the equipment back on the Special Education inventory.

### 9. How important is it that we use an appropriate building number?

Your location's assets are not insured if it does not match a building number referenced in the database or on your inventory list. Do not change building numbers unless the number has been changed by Property Control. Property Control should be contacted before the changing of building numbers is considered. When a building number is changed, everything in the building must be changed.

# SUMMARY OF PROPERTY CONTROL FORMS

## GENERAL INFORMATION

When fixed asset purchases are made through the Purchasing and Accounting Departments of the school system, Property Control will originate an **Acquisition of Fixed Asset Form** (exhibit #1), forwarding the tags and form to the location for additional information.

Forms completed by locations are defined below. All forms have instructions written on them. Please carefully **read** the instructions before completing the form. For additional forms or questions, call Property Control at 922-5436, 922-5470 or 922-5550. Forms require a signature of the Principal or authorized personnel. Make a copy for your files and return **all** parts to Property Control or Physical Plant Services as referenced on the form. Allow Property Control at least **30 days** to process the form(s). If a reasonable amount of time has passed and no copy of the form and/or tag is received, contact Property Control.

### **Donated Fixed Asset Form** (exhibit #2)

The **Acknowledgment of Donated Fixed Asset Form** is for items physically donated to the school system, requiring no goods or services in return for the gift. The donor **may not** use this form for tax purposes. The donor should provide a fair market value of the asset, understanding that the school system is not liable if the value is overstated. Additional information is requested from the school/department and donor to help estimate a value to be placed in the system.

### **Purchased Fixed Asset Form** (exhibit #3)

The **Purchased Fixed Asset Form** is for items purchased through a school/department. This form may also be used by the school to request a property control tag for a fixed asset. An invoice, bill of sale, purchase order number, or some proof of age and cost of the asset should be attached to the form. The attached documentation will provide a value of the asset, and if purchased new, allows credit for parts when maintenance is requested.

### **Fixed Asset Transfer Forms** (exhibit #4)

It is very important that appropriate forms are completed for the transfer of fixed assets. A **Fixed Asset Transfer Form** should be completed when assets are moved from one **school/location** to another. Provide Physical Plant Services' staff with the original form(s) when items are picked up. PPS will pass the transfer forms onto the receiving school/department to obtain the Principal/ Department Head signature.

## PROPERTY CONTROL FORM (Cont'd)

### **Internal Moving of Fixed Asset Form** (exhibit #5)

This form is used when items are moved **within the same location or school**, such as from one building to another. This form is very important for insurance purposes. Complete this form only when the internal transfer is long-term or for at least six months of the year. The location should keep record of short-term internal transfers.

### **Stolen Fixed Asset Forms** (exhibit #6)

If the asset was stolen, a *Stolen Fixed Asset Form* should be completed, referencing the police report number. The theft should be explained in as much detail as possible in the "Explain the Incident" section.

### **Fixed Asset Disposal Form** (exhibit #7)

A *Fixed Asset Disposal Form* should be completed for unwanted assets or for items considered "junk" to be scrapped. Schools should fill out Aramark's "*Fixed Asset Pick-Up Request Form*" (sample in exhibits), attach a copy of the Fixed Asset Disposal Form and route to the Physical Plant Services for pickup. PPS will send the disposal form(s) to Property Control, and the location's copy will be forwarded once processed.

### **Fixed Asset Replaced by Manufacturer Form** (exhibit #8)

These forms are originated by Physical Plant Services (PPS) only. When an item cannot be repaired and is replaced by PPS, a *Fixed Asset Replaced by Manufacturer (Warranty Replacement) Form* is completed, deleting the old asset and acknowledging the new one. The form will be forwarded to the school, requesting location of asset and signature of Principal/Department Head. Verify the receipt of the new asset before completing this form.

### **Offsite Borrowed Fixed Asset Form** (exhibit #9)

This form should be completed when an asset is taken offsite for any length of time. This form grants permission to use an asset offsite for **work or instructional purposes only**. It will be kept on file until the item is returned.

# **EXHIBITS**

*of*

## ***Property Control Forms***

**ACQUISITION OF FIXED ASSET(S)**  
Property Control Section of Finance - Central Office

Name of School/Department : \_\_\_\_\_

We have been notified by the Accounting Department that your school/department has received the following fixed asset:

\_\_\_\_\_  
(Description)

Attached is a fixed asset identification tag that must be placed on the fixed asset item mentioned above. Complete the boxed section below and return the white copy to Property Control. Your timely response and cooperation is appreciated. Call Property Control at 922-5436 if you have questions.

<b>Manufacturer</b> _____	
<b>Serial No.</b> _____	<b>Model No.</b> _____
<b>Bldg. No.</b> _____	<b>Room No.</b> _____
<b>Location No.</b> _____	<b>Date Received</b> _____
<b>Program</b> _____	<b>Phone No.</b> _____
<b>Completed by</b> _____	<b>Title</b> _____

\*\*\*\*\* OFFICE USE ONLY \*\*\*\*\*

**Voucher #** \_\_\_\_\_ **Cost \$** \_\_\_\_\_

**P. O. #** \_\_\_\_\_ **Accounting Date:** \_\_\_\_\_

**Tag Account Number** \_\_\_\_\_

**Fixed Asset ID Tag No.** \_\_\_\_\_

Date completed and sent to location: \_\_\_\_\_ By \_\_\_\_\_  
*(Initials)*

White Copy – Property Control Dept.

Yellow Copy – School/Department

Pink Copy – Maintenance

# ACKNOWLEDGMENT

## OF DONATED FIXED ASSET FORM

DONATED TO: \_\_\_\_\_ SCHOOL/DEPARTMENT LOCATION # \_\_\_\_\_

COMPLETED BY \_\_\_\_\_ TITLE \_\_\_\_\_ PHONE # \_\_\_\_\_

### LIST DONATED FIXED ASSETS BELOW

**NOTE:** Only related items are to be placed on the same form. If newly purchased by Donor, attach a copy of invoice for maintenance credit. If the donation is a vehicle, it must be approved by EBRPSB Transportation Department, before acceptance.

NO	MANUFACTURER & DESCRIPTION	SERIAL NUMBER	MODEL NUMBER	DOLLAR VALUE	BLDG NO.	ROOM NO.	TAG # Office Use Only
1.	IBM Personal Computer	AP123456789	486sx	\$ 2,500.00	1	12	Example
1.				\$ _____			
2.				\$ _____			
3.				\$ _____			
4.				\$ _____			
5.				\$ _____			
6.				\$ _____			
7.				\$ _____			
8.				\$ _____			

AUTHORIZED SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

### **THE DONOR'S SECTION MUST BE COMPLETED.**

The Donor's section below is for tax purposes and for accurate records on the donated asset. If the Donor is not able, the person originating this form may complete the Donor's section below, but the information should come from the Donor.

## DONOR'S SECTION

In accordance with IRC section 170 (f)(8), the East Baton Rouge Parish School Board, a political subdivision of the State of Louisiana, accepts and acknowledges receipt of your gift described above. As the Donor, provide the information below. Your signature transfers ownership to East Baton Rouge Parish School Board, a public system, which provided no goods or services for the gift described above.

DONOR \_\_\_\_\_ Company: Yes or No (Circle One)

Address \_\_\_\_\_ CITY \_\_\_\_\_, State \_\_\_\_\_ Zip \_\_\_\_\_

If Company, Contact Person \_\_\_\_\_ PHONE # ( ) \_\_\_\_\_ - \_\_\_\_\_

Estimated Fair Market Value \$ \_\_\_\_\_ Original Purchase Date & Cost: \_\_\_\_/\_\_\_\_/\_\_\_\_ \$ \_\_\_\_\_  
(MO./YR.) (Cost)

**NOTE:** The donation(s) may be tax deductible at the fair market value solely estimated by the donor. East Baton Rouge Parish School Board has accepted the value but is not liable if the value is distorted.

#### SIGNATURE OF DONOR:

The gold carbon copy is Donor's copy and should be kept with tax records.

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### \*\*\* PROPERTY CONTROL, P.P.S., TRANSPORTATION USE ONLY \*\*\*

Approved: Yes ( ) or No ( ) Number of tags assigned \_\_\_\_\_ If applicable, provide Vehicle ID numbers above.

#### SIGNATURE:

(Property Control, Physical Plant Services, or Transportation)

SEND ALL PARTS TO PROPERTY CONTROL WITHIN 30 DAYS OF ACQUIRING THE ASSET.

COPIES: WHITE (Property Control) \* YELLOW (School/Department) \* PINK (Physical Plant/Transportation) \* GOLD (Donor)

**ACQUISITION OF SCHOOL/DEPARTMENT**

**PURCHASED FIXED ASSET FORM**

(Please read comments below before completing this form)

If the assets were purchased through East Baton Rouge Parish School System's Accounting Department, using a "fixed asset" account number, **do not complete this form**. A tag will be sent from the Property Control Office within 2 to 3 months of purchase. Contact Property Control if tag(s) are not received within the time period specified.

If the paragraph above does not apply, complete this form and send to Property Control within 30 days of the invoice or receipt date. A copy of the original **invoice or receipt must be attached** to get credit for newly purchased items, regarding maintenance.

NAME OF SCHOOL/DEPARTMENT \_\_\_\_\_ LOCATION # \_\_\_\_\_

COMPLETED BY \_\_\_\_\_ TITLE \_\_\_\_\_ PHONE # \_\_\_\_\_

INVOICE/PURCHASE ORDER: Date \_\_\_\_\_ Number \_\_\_\_\_ Check # \_\_\_\_\_

**NOTE:** If the asset is a vehicle, it must be inspected and approved by East Baton Rouge Parish School Transportation Department before purchase. If this step is not followed, repair services and insurance options may be denied.

**ONLY ITEMS PURCHASED ON SAME INVOICE AND/OR CHECK SHOULD BE PLACED ON SAME FORM.**

NO	MANUFACTURER & DESCRIPTION	SERIAL NUMBER	MODEL NUMBER	DOLLAR VALUE	BLDG NO.	ROOM NO.	TAG # Office Use Only
1.	IBM Personal Computer	AP123456789	486sx	\$ 2,500.00	1	12	Example
1.				\$ _____			
2.				\$ _____			
3.				\$ _____			
4.				\$ _____			
5.				\$ _____			
6.				\$ _____			
7.				\$ _____			
8.				\$ _____			

AUTHORIZED SIGNATURE PRINCIPAL/DEPARTMENT HEAD: \_\_\_\_\_

**HOW WERE FUNDS TO PURCHASE THE ASSET OBTAINED?**

(CHECK ONE)

RAISED: Type of Fund-raiser: \_\_\_\_\_

DONATED: By Whom: \_\_\_\_\_ Amount \$ \_\_\_\_\_

Address: \_\_\_\_\_

GRANT (Handled by location) TYPE/NAME: \_\_\_\_\_

FINANCED OR LEASED TO OWN with: \_\_\_\_\_

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PROPERTY CONTROL, P.P.S. , TRANSPORTATION USE ONLY

In compliance: ( ) YES or ( ) NO      *Approved:* ( ) YES or ( ) NO      If applicable, provide Vehicle ID numbers above.

AUTHORIZED SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

(Property Control, Physical Plant Services, or Transportation)

SEND ALL PARTS TO PROPERTY CONTROL WITHIN 30 DAYS OF ACQUIRING THE ASSET

COPIES: WHITE (Property Control) \* YELLOW (School/Department) \* PINK (Physical Plant/Transportation)

# FIXED ASSET TRANSFER FORM

## PROPERTY CONTROL CENTRAL OFFICE

SCHOOL/DEPARTMENT \_\_\_\_\_ LOCATION # \_\_\_\_\_  
(Sending Location)

Completed by \_\_\_\_\_ Position \_\_\_\_\_ Phone # \_\_\_\_\_

SCHOOL/ DEPARTEMENT RECEIVING ASSETS \_\_\_\_\_

**WHERE ARE THE ASSET(S) BEING TRANSFERRED TO?**

*Note: Assets should not be transferred to Sharp Station or Physical Plant Services.*

Name of Location \_\_\_\_\_ Location # \_\_\_\_\_

Reason for transfer: \_\_\_\_\_

Note: Be cautious about transferring items that are for special programs, contact the Coordinator for permission.

1. Were asset(s) being used for "special program"? YES ( ) or NO ( )
2. If question #1 is yes, will the asset(s) continue to be used for the same program? YES ( ) or NO ( )
3. Name of Program Supervisor/ Coordinator granted permission for transfer. \_\_\_\_\_

List below the items to be transferred from your location. **Only one** "receiving location" per from.

ITEM NO.	PROPERTY CONTROL TAG NUMBER	DESCRIPTION	SERIAL NUMBER
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Authorized Signature of Sending Location (Principal/ Department Head) \_\_\_\_\_ Date of Transfer \_\_\_\_\_

**SECTION OF RECEIVING SCHOOL/ DEPARTMENT**

(Based on the item numbers referenced above, provide the building and room numbers below)

ITEM NO.	BUILDING NUMBER	ROOM NUMBER
1.		
2.		
3.		
4.		

ITEM NO.	BUILDING NUMBER	ROOM NUMBER
5.		
6.		
7.		
8.		

Authorized Signature of Receiving Location (Principal/ Department Head) \_\_\_\_\_ Date of Transfer \_\_\_\_\_

**AFTER THE FORM IS COMPLETED, SEND ALL PARTS TO PROPERTY CONTROL**



\_\_\_\_\_  
Date

MEMO TO: Property Control Department  
Central Office

FROM: \_\_\_\_\_  
School/Department

RE: STOLEN FIXED ASSETS

The following fixed asset(s) were stolen from my school/department. Please adjust the fixed asset records accordingly:

TAG NUMBER	DESCRIPTION	SERIAL NUMBER
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

EXPLAIN THE INCIDENT: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

POLICE REPORT DATE: \_\_\_\_\_ POLICE FILE NUMBER: \_\_\_\_\_

PRINCIPAL/DEPARTMENT HEAD \_\_\_\_\_  
Signature Date

AREA ASSOCIATE/ASSISTANT SUPERINTENDENT \_\_\_\_\_  
Signature Date

# FIXED ASSET DISPOSAL FORM

## PROPERTY CONTROL CENTRAL OFFICE

School/Dept. \_\_\_\_\_ Location # \_\_\_\_\_ Room # \_\_\_\_\_ Phone # \_\_\_\_\_  
Requested by \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**INSTRUCTIONS**  
List below items on fixed assets inventory that are obsolete, broken, or non-repairable to be picked up by Aramark/Various Hauling. ONLY items of the same type can be placed on one form. To have the items picked up, a "FIXED ASSET PICK-UP REQUEST FORM" must be completed and faxed with this form.

PROPERTY CONTROL TAG NUMBER	DESCRIPTION	SERIAL NUMBER
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

Date Processed by Property Control \_\_\_\_\_

**ATTENTION**  
Upon evaluation, Aramark/Various Hauling may determine that items are repairable and may not dispose of them. The School/Department does not have to keep the items on inventory; however, Aramark/Various Hauling will determine if the items are to be replaced.

Principal/Department Head \_\_\_\_\_  
Authorized Aramark/Various Hauling Personnel \_\_\_\_\_

ARAMARK/VARIOUS HAULING USE ONLY - FOR PICK-UP	
DATE OF PICK-UP: _____	RECEIVED FROM: _____ <small>(School-Location)</small>
BY WHOM: _____	SHARP STATION: _____ <small>(Signature)</small>



Warehouse 226-7653

Warehouse Fax 226-3718

**FIXED ASSET PICK-UP REQUEST FORM**

Date: \_\_\_\_\_

School/Facility \_\_\_\_\_ Location# \_\_\_\_\_

Location \_\_\_\_\_ Requested By \_\_\_\_\_  
(Problem Area)

Administrator Approval \_\_\_\_\_

Please provide a detailed description of request (please print clearly or it will be faxed back to you)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

For Maintenance Use Only	
Type of Problem	
<input type="checkbox"/>	Various Hauling
<input type="checkbox"/>	Warehouse
<input type="checkbox"/>	Other
Comments: _____	
_____	
_____	
_____	
Work Order # _____	Employee Assigned to: _____

**FIXED ASSET REPLACED  
BY MANUFACTURER FORM  
PROPERTY CONTROL  
CENTRAL OFFICE**

The following fixed asset was replaced by the manufacturer's warranty:

\_\_\_\_\_  
PURCHASE ORDER NUMBER

\_\_\_\_\_  
DESCRIPTION

\_\_\_\_\_  
PROPERTY CONTROL TAG NUMBER

\_\_\_\_\_  
NAME OF SCHOOL/DEPARTMENT

\_\_\_\_\_  
LOCATION #

**SCHOOL/DEPARTMENT'S SECTION**

**NEW ASSET**

Manufacturer replaced the fixed asset described above at your location. Please verify the transaction with a signature of the Principal or Director of your school/department. In addition, provide the information on the new asset below for Property Control and return as soon as possible.

SERIAL NUMBER: \_\_\_\_\_ MODEL NUMBER: \_\_\_\_\_

MANUFACTURER \_\_\_\_\_ BUILDING #: \_\_\_\_\_ ROOM #: \_\_\_\_\_

DATE RECEIVED \_\_\_\_\_ SIGNATURE \_\_\_\_\_  
(PRINCIPAL/DEPARTMENT HEAD)

**\*\*PROPERTY CONTROL USE ONLY\*\***

ACCOUNT NUMBER: \_\_\_\_\_

PROPERTY CONTROL TAG NUMBER: \_\_\_\_\_ INITIAL: \_\_\_\_\_

COPIES: WHITE (PROPERTY CONTROL) \* YELLOW (SCHOOL/DEPARTMENT) \* PINK (MAINTENANCE)

# OFF-SITE BORROWED FIXED ASSET FORM

## PROPERTY CONTROL

### CENTRAL OFFICE

SCHOOL/DEPARTMENT: \_\_\_\_\_ LOCATION#: \_\_\_\_\_

The following person has been authorized to use property of EBRP School System:  
(Please Print)

NAME OF BORROWER	POSITION	EMPLOYEE #

Requested Site Address:

\_\_\_\_\_ (Physical Address) \_\_\_\_\_ (City and Zip Code)

Work Phone#: \_\_\_\_\_ Home Phone#: \_\_\_\_\_

Is borrower's address different? Yes ( ) or No ( )  
(If yes, supply the borrower address below)

\_\_\_\_\_ Street Address (P.O. Box not accepted)

\_\_\_\_\_ City, State & Zip Code

Describe below the current status of the fixed asset(s) being removed to a temporary site:

Property Control Tag Number	Description	Serial Number	Model Number

A signature of the Department Head, School Principal, or authorized personnel is required to release the fixed asset(s) described above to be taken off the East Baton Rouge Parish School System Property sites.

\_\_\_\_\_  
Authorized Signature of Principal/Department Head

### FIXED ASSET OFF-SITE AGREEMENT

The item(s) above will be taken to the site mentioned above. The fixed asset(s) will be used for work and/or instructional purposes. I understand that while the item(s) is in my possession and off School Board property, I will be held responsible for repairs resulting from careless use. I will replace the item(s) if it cannot be repaired or if the item(s) is stolen.

**PLEASE NOTE:** Pursuant to R.S. 17:1948(I), EBRP Special Education Department will not replace or repair any assistive technology device provided by the EBRP Special Education Department to a child with a disability or a parent or guardian of a child with a disability if such device is lost, stolen, damaged, broken, destroyed, or otherwise misused while in the possession of the child, parent or guardian. This does not apply to replacement or repair of such a device which needs repair or replacement as a result of ordinary wear.

\_\_\_\_\_  
(Signature of Person Taking Fixed Asset Off-Site)

\_\_\_\_\_  
Date

Date Returned: \_\_\_/\_\_\_/20\_\_

\_\_\_\_\_  
(Borrower's Signature)

\_\_\_\_\_  
(Recipient's Signature)

White Copy-Property Control

Yellow Copy-School

Pink-Maintenance