



LBNL Facilities Division - Procedure LOGIS-003

Title: Central Receiving- Property Tagging

Application

Applies to Facilities personnel responsible for the DOE property tagging of Attractive and/or controlled assets arriving at Berkeley Lab associated with a Procurement Department generated E-pro/P-Card or E-Buy order.

Purpose

Material arriving at Central Receiving that is categorized as accountable property and/or valued at \$10,000 or more must be tagged with a DOE barcode property tag prior to delivery. All information associated with each received asset must be entered into the Property Management database.

There are specific requirements for the receipt, tagging and data entry of items categorized as Attractive and/or controlled property arriving at Central Receiving. This procedure outlines how assets are recorded and tagged by Central Receiving personnel.

Scope

The scope of this procedure includes requesters, LBNL Procurement and Property Management, Central Receiving, Transportation and the IT Division. These groups work together to ensure that all LBNL property is received, tagged, and documented per strict DOE and Property Management guidelines.

Definitions

i-Box Tracking system: The barcode scanning program used by Receiving personnel to document the receipt of all material arriving at the LBNL Receiving dock. This receipt process is called "Sorting".

Accountable Property

- **Equipment:** Functionally complete, non-expendable assets that retain their identity and are not intended to be incorporated into another asset with an acquisition cost of at least \$ 10,000 and less than \$ 500,000 are considered equipment, which must receive a barcode.
- **Capital Personal Property:** Personal property items with an original acquisition cost of \$ 500,000 or more are termed Capital Personal Property. These items must receive a barcode and are subject to annual inventory requirements.
- **Sensitive Property:** The Laboratory will prepare a list of personal property items considered to be Sensitive and submit it to the Site Office Contracting Officer annually, on October 1, for acceptance. The list will be posted on the Property Management website after acceptance. Precious metals and controlled substances are considered Sensitive Property by definition.



- Precious metals are specifically defined by the DOE as; Gold, Iridium, Osmium, Palladium, Platinum, Iodine, Rhuthenium and Silver and are considered Sensitive Property by definition. Precious metals require stringent physical protection from receipt to disposition. Unused or unneeded metals must be returned to the DOE Business Center or have retention approved by the Site Manager on an annual basis. Only Laboratory career employees may be the custodian of precious metals.
- Controlled Substances are acquired, managed and disposed of in accordance with the Laboratory's Controlled Substance Security Plan and are considered Sensitive Property by definition. In general, Environment, Health and Safety has overall responsibility for Controlled Substances. Property Management is responsible for conducting and reporting the outcome of the required annual inventory. The Controlled Substance Security Plan is posted on the property website.

Other Accountable Property: The Laboratory has identified Laptop Computers, Desktop computers, Tablets and handheld radios as Other Accountable Property and placed them in a category called Attractive Property. These items are barcoded and subject to inventory control.

Roles & Responsibilities:

LBNL Procurement

- Reviews E-Pro generated requisition to determine if item requested is categorized as an attractive and/or controlled (> \$ 10K) item
- Ensures that the DOE Tag field in PeopleSoft E-Pro is checked

Central Receiving Material Handler

- Off loads courier and freight deliveries
- Performs "Receipt Scan" to verify delivery package counts
- Performs receipt of controlled and high dollar value items
- Ensures that a DOE Property Tag is affixed to all controlled and/or high dollar value items
- Enters all required property information into PeopleSoft
- Scans material into i-Box tracking system
- Creates and maintains hard files at receipt location containing PO information

Central Receiving Material Specialist

- Is the prime point of contact for Central Receiving
- Determines disposition of material and paperwork if error/damage observed
- Provides guidance and direction to Material Handlers
- Coordinates non-routine deliveries with Transportation personnel
- Performs all duties of Central Receiving Material Handlers



Technical Supervisor

- Provides line management to the Receiving, Transportation and Shipping functions
- Ensures staff compliance with all LBNL, DOE and DOT requirements

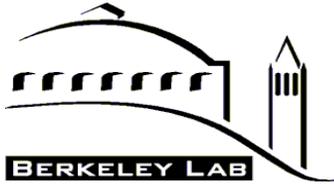
Procedure

Receiving Dock

1. Inspect material for damage; annotate on freight bill if damage observed
2. If damage observed refer to "Exceptions" Training Document (*RECTRAIN-01*)
3. "Receive scan" each package into i-Box
4. Match package count with courier manifest count
5. Notify Supervisor if damage observed and/or discrepancies exists
6. Stage material prior to receipt on pallets or on conveyor line in designated receiving area

Purchase Order/P-Card Receipt & Tagging Process

1. Material Handler logs into PeopleSoft by entering the user name and password provided by Procurement
2. Selects "Receipts" from the submenu
3. Selects the Add tab
4. Enters the purchase order (PO) number
5. Reviews the DOE Tag Required field or the Notes to the Receiver field
6. Verifies material cost to determine whether a DOE property tag is required
7. If the material meets receiving criteria for tagging (i.e., the material is categorized as attractive and/or controlled (valued at \$10,000 or more), Central Receiving:
 - a. Records DOE property, serial, and model numbers on the packing list
 - b. Enters DOE property, serial, and model numbers in the Asset Information field (see LOGIS-008 Exhibits, Exhibit D)
 - c. Affixes the DOE property tag to the item per LBNL Procurement Asset Tagging Spec. (10/07) (see LOGIS-008 Exhibits, Exhibit E)
 - d. Enters "Generate Receipt"
 - e. Enters "Save" (a PeopleSoft receipt number is generated). See LOGIS-008 Exhibits, Exhibit F.
 - f. Enters the Receipt number on the packing list
 - g. Scans material into iBox
 - h. Selects "signature required" in the "Receipt" field if a DOE property tag is required (i.e., if the material or property is an attractive or controlled:
 - i. Computers, software



- ii. controlled (more than \$10,000)
 - iii. Property that is highly portable, easily converted to personal use
 - i. Places documentation in the PO receipt file
8. If the material meets receiving criteria for tagging, but cannot be tagged by Central Receiving, the following steps are followed:
- a. The shipment is received in Peoplesoft
 - b. A line comment is added with the DOE# and reason for field tag.
 - c. The receipt report is printed.
 - d. Asset tag is affixed to receipt report and given to Receiving Lead.
 - e. Document is then forwarded to Property Management.

Stage Material for Delivery

- 1. Places large items on pallets
- 2. Places small packages (weighing less than 50 pounds) on a designated Transportation delivery cart
- 3. Affixes the iBox-generated address label to the package (See LOGIS-008 Exhibits, Exhibit A)

References

- LOGIS-008, Exhibits Book
- Receiving Training Documents
- LBNL Property Manual PUB 3032
- Property Management Asset Tagging Specification
- LBNL Procurement Guide Section 3.1
- Department of Transportation 49CFR, 172.0

Contacts

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