Property Accounting Equipment Annual Certification Instructions

In compliance with University Financial **Policy B053**, **'ANNUAL EQUIPMENT VERIFICATION INSTRUCTIONS AND APPROVAL SUBMISSION'**, all department administrators must conduct an annual physical equipment inventory as required by Federal regulations. The certification process uses a web-based interface system, UMAPPS to maintain, delete and update all equipment records. The process is outlined below:

I. View and Download Inventory List

- 1. Logon to UMAPPS <u>https://umapps1.miami.edu/</u>using your PIDMS/DMAS user id and password
- 2. Click on the 'Financial' tab and select 'Movable Equipment' from the drop down list.
- 3. Click on the 'Equipment' tab and select 'Equipment by Department' from the drop down list.
- 4. Enter department and sub-department number or select from drop down list.
- 5. You may click 'Retrieve' to view the data or click the 'Create Spreadsheet' tab to download directly into an Excel file. Note: You may also download into Excel directly from the 'View' screen.

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We suggest that you save a copy of the Excel spreadsheet to your computer and print a working copy for use in conducting the physical inventory. If you use Google Chrome as your web browser, it may require that you associate the file with a program (Excel) before saving.

II. Inventory Process

Physically verify that all equipment is in the correct building with the correct room number. Verify the location of all items that have an inventory date <u>older than 6 months</u>. Note any changes of building, room number and/or department code on the working copy. After the physical inventory is complete, you must update any changes in UMAPPS:

- 1. Follow steps 1 & 2 above to Logon to UMAPPS
- 2. Click on the 'Equipment' tab and select 'Update Equipment' from the drop down list.
- 3. Enter the 'decal number' of the item that you are updating and click on the 'Retrieve' button. *Note:* the Decal Number is the unique equipment identifier on the tag assigned by Property Accounting to all equipment over \$2,500.

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- 4. To <u>change location</u>, select new building and room number from drop down lists. Add any comments that may assist in locating or identifying the equipment. If the equipment is located off site at a non-UM building, select 'Off-Campus' and complete the 'NOTIFICATION OF EQUIPMENT LOCATED OFF CAMPUS' form (Policy B045) <u>https://umshare.miami.edu/web/wda/controllers/FormB045.pdf</u>. After each record is updated, click the 'Save' button to save changes, and wait for confirmation message, "Saved Successfully".
- 5. To <u>delete equipment</u>, click on the 'Equipment' tab and select 'Delete Equipment' from the drop down list. Enter the decal number and click on the 'Retrieve' button. Select the appropriate deletion type and click on 'Confirm Delete' to save changes, and wait for confirmation message, "Deleted Successfully". Prepare the appropriate deletion form, as needed, and submit to Property Accounting.

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III. Inventory Certification.

After all equipment has been physically verified and all updates/deletions are entered into UMAPPS, the annual certification must be completed.

- 1. Click on the 'Equipment' tab and select 'Annual Equipment Inventory Certification' from the drop down list.
- 2. Enter department number or select from drop down list.
- 3. Click on 'Retrieve' button.
- 4. Click on 'Approve' button to complete certification. This will update all records with a current inventory date and complete the certification process. Certification must be completed by an authorized department representative.

After annual inventory and certification have been completed, maintain all related documents, including a copy of the inventory spreadsheet, for a period of 7 years. These documents are subject to audit by Property Accounting, Internal Audit, the University's external auditors, and/or the Federal government. If you have any questions, please contact Property Accounting at 305-284-4656.