The Control and Screening of Equipment Purchases from Contracts and Grants Policy

Responsible Office: Controller’s Division
Originally Issued: January 1978
Revised: November 1990

Purpose

To prescribe policies and procedures for screening equipment purchases when sponsored funds are to be utilized.

Policy

It shall be the policy of this institution to assure that all subject equipment purchases conform with the prerequisites of the agency sponsoring the project award.

Procedure

Principal Investigator

1. Prepare a departmental request for any item of equipment desired for purchase.
2. Prepare and approve in duplicate an equipment control sheet (see sample) providing all approvals and justifications. Attach a Budget Amendment form if rebudgeting is necessary.
3. Send the completed equipment control and screening sheet and departmental request to the departmental chairman.

Departmental Chairman

1. Review the equipment control and screening sheet for appropriate approvals and justifications. Determine if the equipment is needed for the project and/or if suitable excess equipment or under-utilized equipment is available within the department or within convenient proximity of the project area.
2. Send approved forms and attachments to the Controller’s Division, Sponsored Accounting for review and action.

Controller’s Division

Sponsored Accounting

1. Receive Equipment Control and Screening Sheet and Departmental Request from departmental chairman and review documents for approvals and attachments.
2. Send any Equipment Control and Screening Sheets Sponsored Accounting and Departmental Request with an item of equipment costing $4,000 or more and not listed in the grant application to the Research Institute Executive Director for review and approval.

Research Institute

1. Review and approve the Equipment Control and Executive Director Screening Sheets having items costing $4,000 or more and not listed in the grant application.
2. Return the approved sheets and Departmental Request to the Controller’s Division.
3. Initial the approved Departmental Requests assign an object code as follows:
843000 – Equipment costing $1,000 or more
843200 – Computer Equipment
743010 – Federal Equipment costing $500 – $999

1. Send the approved sheets, and Departmental Request to the Purchasing Section for processing or return the disapproved forms to the Principal Investigator with an explanation.

Materials Management Div./Purchasing

1. Receive Departmental Request and verify Controller’s Division approval and object code.
2. Process Departmental Request in accordance with established procedures.

Forward Purchase Order, Departmental Request, and Screening Form to Vendor Payments Accounting for payment documentation.

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