Equipment Inventory and Verification

Preparation for PCSA Audit
HCA Management
10/15/2021
Introduction - Property Control Systems Analysis (PCSA)

Impact
• Recipients of Federal Grants and Contracts
• Consequence - Removal of expanded authority

PCSA Compliance
• Federal Acquisition Regulations 45 – Government Property (FAR 45)
• Includes clause 52.245-1 Government Property, Section (f)(1)

• Audit includes:
  • Physical inspection of equipment
  • Interviews with UTEP personnel
  • Examination of UTEP records and procedures
Introduction – Who?

HCA Asset Management
• 36 years of experience
• Greg Sheahan – President (30 years related experience)
• Mariana Traetta – Director (15 years related experience)
• Additional 2 HCA Staff

Scope
• Scan all inventory and re-tag as needed
• Identify Federally Owned assets and add secondary tag
• Identify Agency Owned assets and add secondary tag
• Identify location and verify existence of all assets
• Reconcile all data collected to PeopleSoft
Inventory Process - Sweep & Retagging

• Ensure all inventory is properly tagged
  • White tag – Title rests with University
  • Green tag – Title rests with Federal Government
  • Red tag – Title rests with Agencies

• Identify location of inventory
  • Scanning, review of existing assets – tagged and not tagged
  • Reconciliation of missing assets to remove “ghost items”
  • Reconciliation of data records to create clean baseline
### Inventory Process (continued)

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<tr>
<th>Kick off</th>
<th>Phase 1: Blitz</th>
<th>Phase 2: Reconciliation</th>
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<td>• Initial memo to university community – <strong>September 27, 2021</strong>&lt;br&gt;• Memo from Dr. Osegueda – <strong>October 13, 2021</strong>&lt;br&gt;• Town Hall meeting – <strong>October 15, 2021</strong>&lt;br&gt;• Clarify roles/responsibilities&lt;br&gt;• Opportunity for questions</td>
<td>• <strong>Building focus</strong>&lt;br&gt;• HCA staff will cover all buildings&lt;br&gt;• Majority of equipment will be located during this phase&lt;br&gt;• <strong>October 25 - November 12, 2021</strong></td>
<td>• <strong>Department focus</strong>&lt;br&gt;• Providing lists to locate items not found during blitz phase&lt;br&gt;• List of ‘to be accounted for’ items will be provided to departments in advance&lt;br&gt;• <strong>November 8 – December 17, 2021</strong></td>
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Common Topics

• Accessibility to sensitive space
  • Biosafety Level 3 (BSL3s)
  • Animal Areas (Vivariums)
  • Residence Halls, Athletics, IT (by appointment)
  • ITAR Areas

• Timing of HCA personnel presence in each space
  • Preliminary schedule for Blitz Phase can be found on this link: Inventory Sweep
Common Topics

• Identification of HCA personnel
  • HCA staff will wear UTEP visitor badges and will carry print out of memo in case occupants are unaware of inventory initiative

• Physical scanning of tags
  • Treatment of untaggable assets – small subset of assets that should not be tagged
  • Treatment of vehicles, IT switches

• Fully-depreciated assets
  • All capital equipment still in use must be included in the university’s inventory records until properly disposed of
Keys to Successful Comprehensive Inventory

Communication

Tools and Technology

Points of Contact

Data Integrity

Space Access

Floor Plans

Flexibility

Keys to Successful Inventory
Next Steps

• Review High Level Schedule for Week 1
  • Inventory Sweep – to be updated by Friday morning week prior
• Invitation to Brown Bag Session next week – Date TBD
  • In person and virtual options
• PeopleSoft Workflows – after inventory project is finalized
  • Asset Transfers
  • Asset Removal
  • Asset Return
  • Asset Transfers to Surplus
  • Link to PeopleSoft Workflows
More Information

• **Inventory Sweep Website** includes updates relevant to the project, including this presentation and schedule.

• **HCA Contact: Mariana Traetta**
  913-271-2546 mtraetta@hcamgt.com

• **UTEP Contact: Daniel Dominguez**
  915-747-5083 drdominguez@utep.edu
Questions?

Thank you!