



Procedure BF-PM-PR6 Distribution Services: Supply and Equipment Receipt, Moving Services, Table and Chair Setup, and Document Destruction

Dates Effective: October 22, 2019

Responsible Officer: Associate Vice President and Controller

Sponsoring Department: Business Services

Errors or changes to: Policysite@uta.edu

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Objective

This procedure provides procedural guidelines for the receipt of supplies and equipment that are delivered to Distribution Services, including guidance on the information required to be reported, the inspection of supplies and equipment received, and the delivery of the received items to University of Texas at Arlington (the "University") departments. In addition, this procedure describes the other services offered by Distribution Services, including moving services, surplus property pick-up, table and chair set-up, and the used bicycle sale.

This procedure also provides instructions for coordinating the destruction of records that have met retention requirements. The requirements herein support the management of University records and information in accordance with UT System policy UTS115 *Records and Information Management and Retention Policy and Research*.

Rationale

State law requires that state agencies, including the University, are responsible for the custody and care of property in their possession, and for maintaining current and accurate property records of University inventory at all times. In order to ensure said state requirements are met, it is necessary to thoroughly record all supplies, equipment and other property that are purchased by University departments and received by Distribution Services. In addition to inventory receipt, distribution and



disposal, Distribution Services provides other essential services. Those services are also described herein.

Scope

All university departments that have supplies or equipment delivered to Distribution Services and/or use other services offered by Distribution Services.

All university departments and personnel responsible for the collection, preparation and submission of documents and information, including information in electronic format, to Distribution Services for destruction by contracted vendors in accordance with UT System and University requirements.

Procedures

Responsibilities

Distribution Services

- Responsible for the disposition of surplus and salvage property.
- Collaborates with Inventory Services and provides information necessary to ensure UT Share is accurate and up-to-date at all times.
- Oversees and maintains the storage, evaluation and handling of all surplus property.
- Receives and distributes University property.
- Records receipt of all supplies and equipment on internal tracking system and checks for obvious signs of damage. Distribution Services will not open shipping containers or packages, or break down pallets except in the presence of a member of the ordering department.
- Provides limited moving services at hourly rates, event table/chair setup and moving crate rental at daily rates.
- Moves furniture and equipment from the departments to surplus property.
- Picks up and secures the departments' pre-boxed documents for document destruction.
- Contracts with a shredding vendor to provide shredding services for University departments that want to have their records destroyed.
- Notes when records are destroyed and forwards a certificate of destruction to the Office of Legal Affairs when records are destroyed.
- Conducts annual used bicycle sale.

Department Head

- Primarily responsible for the care and safeguarding of all University property assigned to, possessed or in use by their respective departments.

- Primarily responsible for ensuring all department staff abide by the requirements of these procedures.
- Ensures that university property is used by department staff and students for official purposes only.
- Ensures accurate and current records of departmental property are maintained.
- Ensures all merchandise delivered to the department by Distribution Services is checked and verified for accuracy and completeness.
- Ensures Distribution Services is notified within three (3) working days of any discrepancy concerning the shipment and delivery of received merchandise.

Section I. Receipt and Delivery of Supplies and Equipment (Non-Capital/ Non-Controlled)

A. This procedure does not apply to the receipt and handling of capital and controlled assets. For requirements pertaining to capital and controlled assets, please refer to Procedure BF-PM-PR2 Acquisition, Receipt and Distribution of University Property.

B. All supplies and equipment ordered with a purchase order ("PO") are delivered to the receiving dock at the Wetsel Service Building. Procurement card ("ProCard") purchases may be delivered either directly to the purchasing department or to Distribution Services.

C. The Distribution Services loading dock is located at the north end of the Wetsel Building located at 1225 W. Mitchell. The loading dock hours are Monday through Friday, 8 a.m. to 5:00 p.m.

D. When supplies and equipment are received at Distribution Services' loading dock, Distribution Services staff will check the merchandise for obvious signs of damage, and then arrange for delivery to the ordering department. Distribution Services will not open shipping containers or packages, or break down pallets except in the presence of a member of the ordering department.

E. Distribution Services is not responsible for damage caused to merchandise, buildings or other property that occurs during the delivery process except for that which results from the negligence of Distribution Services staff.

Section II. Moving Services

A. Distribution Services provides moving services to University departments at hourly rates.

B. Moving services can be requested by completing a Form BF-PM-F4 Work Request Form and sending by email to Distribution_Services@uta.edu. The preferred



method is email. The completed Form BF-PM-F4 must include an account to charge. Moving charges will then be made by Interdepartmental Transfer Entry.

C. Moving Crates. Distribution Services will furnish moving crates based on availability. Use of these crates will require a department representative signature at check-out. The department will be charged replacement costs if crates are not returned. Daily and weekly rates will be charged for rental.

D. In the event the equipment to be moved exceeds Distribution Services capabilities due to size or weight, Distribution Services will provide the requestor with an off-campus vendor contact. It is recommended that the department obtain an estimate for services, as the department will be responsible for all moving charges.

E. Distribution Services is not responsible for property damage occurring during the provision of moving services except for that which results from the negligence of Distribution Services staff.

Section III. Surplus Property Pick-up

A. Distribution Services provides pick-up services for the removal of furniture and equipment from departments to surplus property. If applicable, Distribution Services will list items that are too large or heavy for moving to surplus, for auction in place. In that case, the purchaser will be responsible for the removal of the item at their expense. Departments may contact Distribution Services for information about auctioning equipment in place.

B. There is no charge for the pick-up of items for removal to surplus property. However, items scheduled for removal as surplus property that are determined by Distribution Services to be trash will be assessed a charge for removal.

C. In the event the equipment to be removed exceeds Distribution Services capabilities due to size or weight, Distribution Services will provide the requestor with an off-campus vendor contact. It is recommended that the department obtain an estimate for services, as the department will be responsible for all moving charges.

D. Distribution Services is not responsible for property damage occurring during the provision of removal services except for that which results from the negligence of Distribution Services staff.

Section IV. Table/ Chair Set-Up

- Distribution Services provides tables and chairs for use at campus events.
- There is a charge for set-up and daily and weekly rental.

- To reserve or request table and chair set-up, please submit a completed Form BF-PM-F4 Work Request Form by email to Distribution_Services@uta.edu. The completed Form BF-PM-F4 must include an account to charge. Set-up charges will be made by Interdepartmental Transfer Entry.
- Work orders for table/ chair set-up should be submitted to Distribution Services no later than two weeks prior to the requested set-up date, if possible.
 - Any work orders submitted less than two (2) business days prior to the requested set-up date will be considered "rush requests" and will incur an additional service charge.
- Distribution Services is not responsible for property damage occurring during the provision of set-up services except for that which results from the negligence of Distribution Services staff.

Section V. Document Destruction

A. Please refer to the University's Records Retention Schedule or contact the departmental Records Management Contact (RMC) for guidance regarding when documents may be destroyed and other requirements related to record and information management, including the handling of electronic records.

B. The shredding services offered by Distribution Services should be considered when a department needs to destroy a large amount of official University records that have not yet retention requirements or that are duplicates or reference copies stored on tangible media, especially those that contain confidential and/or restricted information.

C. If the records contain any confidential or restricted information, the records (including transitory, official record copies and duplicates) must be secured and destroyed by shredding. Some examples of confidential records are student records, personnel files and trade secrets. Records containing both confidential and public information should be considered confidential.

D. Departments are responsible for storing confidential or restricted information in a secured area until they are transported to Distribution Services for destruction.

E. Document (paper and electronic) destruction by Distribution Services.

- Once the department has determined that it wishes to destroy documents and/or tangible media (videos, audio tapes, computer disks, and microfilm) through Distribution Services, the department requests pick-up of the documents by completing the top portion of the Form BF-PM-F5 Document Destruction Request Form and the Form GA-LA-F7 Records Disposition Log.

- When completing the forms, the requesting department will need to specify a department contact, the building and room that houses the records, and the department's account number for billing.
 - Once the requesting department has completed the top portion of the Form BF-PM-F5 and the Form GA-LA-F7, the form should be e-mailed to Distribution_Services@uta.edu.
 - Distribution Services will contact the requesting department to schedule a pick up date and time.
 - At pick up, a department representative must sign the Form BF-PM-F5 Document Destruction Request Form to release custody of the records to Distribution Services for destruction.
 - Distribution Services staff will enter the disposition date on the Form GA-LA-F7, initial the form and return to the department when the records are destroyed.
- If the boxes contain records that have confidential or restricted information, the boxes should be held in a secured area until they are picked up by Distribution Services or taken directly to Distribution Services.
 - All boxes that will be picked up by Distribution Services must be sealed and secured. Distribution Services will not pick up unsealed boxes or records stored in bags. It is recommended that the requesting department use standard record storage boxes. A standard record storage box measures about 1.2 cubic feet and can accompany legal and letter-size materials.
 - When packing the box, it is recommended that you remove paper clips, metal clips, binders, and bindings. This will save office supplies, space in the box, and will speed processing when the box is due for destruction.
 - Please mark boxes with the sending department's name, the date sent, and either a description of box contents or numbering the boxes 1 of 3, 2 of 3, 3 of 3, etc. This will assist to accurately track the records and ensure that they reach their destination.
 - After pick up, the boxes will remain securely stored in the University warehouse while waiting for pick-up by the contracted vendor for off-campus destruction.
 - When the records have been destroyed, Distribution Services staff will note when the records were destroyed and forward the disposition log to the Office of Legal Affairs.

- A certificate of destruction will be produced by the vendor and forwarded to Distribution Services, who will then forward the certificate to the Office of Legal Affairs.

VI. Used Bicycle Sale.

A. Distribution Services collects used bicycles from two sources:

- Bicycles determined to be abandoned and collected by the University Police.
- Bicycles that are donated.
 - Donated bicycles must be adult-sized bicycles, and have all parts (including pedals, chain, etc.) and be in working condition. The need for minor repairs is acceptable.
 - The donor must be able to prove ownership of the bicycle.
 - Donated bicycles may be dropped off at Distribution Services or by contacting Distribution Services at Distribution_Services@uta.edu to schedule a pick-up.

B. At the start of each fall and/or spring semester, University students may purchase a used bicycle from Distribution Services at a used bicycle sales event. The department offers bicycles from the abandoned and donated bicycle collections that are determined by Distribution Services to best combine quality and condition.

- Distribution Services will establish and announce a date, time and site on campus for the used bicycle sale.
- All bicycles are sold AS IS for a price to be determined by Distribution Services. Purchased bicycles come with a brand new U-lock.
- All sales will be made on a cash basis only.
- Upon purchase, bicycles will be registered by the University police department.
- Bicycle sales are limited to one bicycle per year per student. A student ID must be presented at the time of purchase.
- Bicycles are available on a first-come, first-served basis.
- All sales are final.



Effective Date

This procedure becomes effective immediately upon its publication in the University's Office of Legal Affairs Policy Site.

This procedure replaces and supersedes:

- Procedure 2-49 *Property Management and Property Management Services* [October 5, 2015]
- Procedure 2-74 *Shredding of Records Through Property Management* [October 27, 2015]

In the event any of the provisions of this procedure conflict with state or federal law, or UT System rules or regulations, then those authorities will take precedence over the provisions set forth herein.

Definitions

Capital Asset: Real or personal property that has an estimated life of greater than one year and a value equal to or greater than the capitalization threshold established for that asset type. The threshold values for capitalized assets include the following:

| Description | Threshold Amt. |
|---|--|
| Tangible Assets | |
| Furniture and equipment | \$5,000 |
| Vehicles, boats and aircraft | \$5,000 |
| Other capital assets | |
| <ul style="list-style-type: none"> • Books - Historical, Manuscripts & Rare Publications • Works of art and historical treasures • | <ul style="list-style-type: none"> • \$0 • \$0 |
| Intangible Assets | |
| Computer software | \$100,000 |
| Internally developed computer software | \$1,000,000 |
| Other intangible capital assets | \$100,000 |

Confidential Records: Records to which public access is denied under the Texas Government Code, Chapter 552, or other state or federal law (Ex. student records, personnel files, some litigation records, records that contain trade secrets, records that relate to bid competition, and memos that would not be available to anyone in litigation with the University).

Controlled Asset: An asset that does not meet the capitalization value threshold, but still must be secured, tracked, and accounted for in the annual inventory due to the nature of the item. Controlled assets include:

Controlled (at any cost)

| Class Code | Property Item |
|-------------------|--|
| 106 | Hand Guns |
| 107 | Rifles and Shotguns |
| 203 | Servers |
| 204 | Computer Desktop – not Apple |
| 214 | Computer Desktop - Apple |
| 219 | Smartphones, Tables, & Other Hand Held Devices |
| 284 | Laptop Computers – not Apple |
| 294 | Laptop Apple CPU |

Controlled (\$500.00 to \$4,999.99)

| Class Code | Property Item |
|-------------------|---|
| 129 | Sound Systems and Other Audio Equipment |
| 130 | Camera – Portable -Digital, SLR |
| 131 | TVs, Video Players/Recorders |
| 218 | DATA PROJECTORS |
| 735 | UNMANNED AERIAL VEHICLES (UAV) DRONES |

Department Head: The individuals (Chairs) designated by the Deans of the ten academic University Colleges or Schools, including the University Library, to lead the various departments within those colleges and schools. In regards to non-academic divisions, the Vice Presidents, Assistant Vice President, Associate Vice President, Executive Director, University Attorney, and Athletic Director, all of whom report directly to the University President, are the Department Heads of their respective divisions. Department Heads may delegate their duties hereunder as they deem appropriate. However, the accountability of the Department Heads hereunder is non-delegable. A list of University departments is maintained by Inventory Services and can be obtained by email request to Inventory Services at inventory@uta.edu.



Distribution Services (“Distribution Services”): The University department supervised by the Assistant Vice President for Business Services that is responsible for, among other things, the receipt and distribution of University property, and the disposition of surplus and salvage property.

Duplicate/Reference Copy: A duplicate copy of the official record copy of an official University record. The duplicate may be disposed of appropriately before or at the time retention requirements are met for the official record copy.

Electronic Records: Records stored in a format that only a computer can process or retrieve. Any official state record may be created or stored electronically in accordance with standards and procedures adopted as administrative rules of the Commission.

Equipment: A tangible asset that is functionally complete for its intended purpose, durable, nonexpendable, and needed for the performance of a contract or some other identifiable purpose. Equipment is not intended for sale, and does not ordinarily lose its identity or become a component part of another article when put into use.

Official University Record: This term applies to any written, photographic, machine-readable, including email, or other recorded information created or received by or on behalf of the University that documents activities in the conduct of business or use of public resources. The term excludes:

- Library or museum material made or acquired and preserved solely for reference or exhibition purposes
- Extra copies preserved only for reference
- Stocks of publications or blank forms
- Correspondence, notes, memoranda, or other documents not containing a final written agreement associated with a matter conducted under an alternative dispute resolution procedure in which university personnel participated as a party, facilitated as an impartial third party, or facilitated as the administrator or a dispute resolution system or organization.

ProCard: The Purchasing Card (“ProCard”) Program is authorized by the State of Texas, Texas Procurement and Support Services (“TPASS”). The program is designed to delegate authority and capability to purchase certain low-value items directly to the account manager. Use of the ProCard significantly reduces the requirement to obtain purchase order numbers, process invoices for payment and prepare large numbers of voucher/payment documents.

Property: Any capital or controlled asset in the possession and control of the University that is not classified as real property. Property is any possession of the University/ State of Texas that has sufficient value and/ or is of a particular nature so as to warrant inclusion in the fixed asset financial reports and to have management controls placed upon it. For purposes of this procedure, it does not include



consumable items nor does it include real property such as land or buildings, improvements to land or buildings, or infrastructure.

Purchase Order: Written authorization for a supplier to ship products or provide a service at a specified price, which becomes a legally binding contract once the supplier accepts it.

Records Management: Texas Government Code 441.180, Definitions(7) defines records management as the application of management techniques to the creation, use, maintenance, retention, preservation, and destruction of records for the purposes of improving the efficiency of recordkeeping, ensuring access to public information under Chapter 552 and reducing costs. The term includes:

- Development of records retention schedules
- Management of filing and information retrieval systems in any media
- Adequate protection of records that are vital, archival, or confidential according to accepted archival and records management practices
- Economical and space-effective storage of inactive records
- Control over the creation and distribution of forms, reports, and correspondence
- Maintenance of public information in a manner to facilitate access by the Public Information Officer (PIO)

Records Retention Schedule: The State-certified records retention schedule provides a list of official University records and prescribes their periods of legally required retention and other data necessary for the records management program. The schedule is periodically updated to reflect the addition or deletion of records series and changes in retention needs and/or requirements.

Surplus Property: Property that exceeds the University's needs and is not required for the University's foreseeable needs. The term includes used or new property that retains some usefulness for the purpose for which it was intended or for another purpose.

Tangible Medium: Paper, microfilm, flash drive, DVD, CD, etc. that can be read without electronic hardware or software, or that can be removed and carried from one electronic device to another.

Relevant Federal and State Statutes

Texas Government Code §§403.013, 403.2715, 403.272, 403.273(h), and 403.275

Texas Government Code, Chapter 552, *Public Information*

Texas State Library and Archives Commission, State Records Management Laws



Texas Government Code, 441.183, Records Management Programs in State Agencies

Texas State Library State Bulletin No. 1: Electronic Records Standards and Procedures

Texas State Library State Bulletin No. 3: Records Retention Scheduling Rules

13 Texas Administrative Code, Chapter 6, *State Records, Subchapter A, Records Retention Scheduling*

TAC 202.78 Removal of Data from Data Processing Equipment

Relevant UT System and UTA Policies, Procedures, and Forms

UTS 159 Purchasing

UTS115 Records and Information Management and Retention Policy

UTS139 Texas Public Information Act

Document Destruction Request Form BF-PM-F5

Record Disposition Log Form GA-LA-F7

UTA Records Retention Schedule

Contact Information

If you have any questions about this procedure, contact the following departments:

| Subject | Office Name | Telephone Number | Email/URL |
|--------------------------------------|-------------------------|------------------|--|
| All topics covered in this procedure | Distribution Services | 817-272-2191 | Distribution_Services@uta.edu |
| Website access | Office of Legal Affairs | 817-272-5577 | kphillip@uta.edu |