



Facilities and Operations **POLICY**

Applies to:	Marshall University Facilities and Operations
Title:	Surplus Inventory Procedure
Number:	MU-FO-02.16
Effective Date:	03/20/26
Last Revision Date:	N/A

PURPOSE: To establish a standardized procedure for processing incoming and outgoing surplus items at Marshall University, including documentation, communication with requestors, and preparation for warehouse handling.

SCOPE: This procedure applies to all Facilities and Operations personnel located at the Shipping and Receiving Warehouse who are responsible for coordinating surplus pickups/deliveries, managing documentation, delivering surplus items to requesting departments, and determining the disposition of surplus items.

REFERENCES:

- Attachment A – Surplus Invoice Form
- Attachment B – Surplus Pickup Form
- Attachment C – Surplus Transfer Form
- Attachment D – Surplus Trash Form

DISCUSSION:

Responsibilities:

- **Requestor:** Submits work order and completes the surplus pickup form.
- **Department Representative:** Tag item(s) selected, completes the surplus invoice form in Receiving, and submits yard sale work in Maintenance Care for delivery.
- **Shipping and Receiving Manager/Business Clerk:** Marshall University has granted authority to the Shipping and Receiving Manager and the Business Clerk to make decisions regarding disposition of surplus items.
- **Business Clerk:** Sends required forms, verifies returned documentation, prepares work order packets, and maintains records. Determines the final disposition of each surplus item and records this information.
- **Warehouse Personnel:** Picks up/delivers surplus items based on completed documentation.

PROCEDURE / POLICY:

1. OUTGOING ITEMS

a. Selecting Items

- i. Department representatives visit surplus areas to look for items their department can use.



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- ii. When they find an item, they want to claim, they must complete the following steps.

b. Tagging Items

- i. Attach a manila tag (provided in the surplus area) to each selected item.
- ii. The tag must include:
 - Department Representative's Name
 - Date
 - Building and room number where the item will be moved to.

c. Completing the Surplus Invoice (2-Part Form)

- i. Fill out all required fields on the surplus invoice:
 - Department
 - Date
 - Department org.
 - Delivery or carry-out selection
 - List of items
 - Signature
 - Phone number
 - Destination building and room number.
 - **White copy** → Kept in Receiving.
 - **Yellow copy** → Given to the department representative.

d. Submitting a Work Order

- i. The department representative must submit a (yard sale) work order to request delivery of the item(s).
- ii. After the work order is submitted:
 - A copy of the work order is attached to the surplus inventory.
 - Warehouse personnel receive the documentation and schedule the delivery.

e. If item has a MU tag number:

- i. The Business Clerk will enter the tag number in Banner and change the user reference information to the new department location, using the FFAMAST module.
- ii. Next, the Business Clerk will enter the tag number in Banner using the FFATRAN module and transfer the item to the new department.

f. Records Management

- i. All completed delivery forms must be attached as a document, to the corresponding work order in Maintenance Care.
- ii. Hard copies remain attached to the work order until the surplus process is fully completed.
- iii. Records must be retained in accordance with Marshall University's records retention policies.

2. INCOMING ITEMS

a. Work Order Submission



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- i. A work order is submitted in Maintenance Care requesting a Surplus (Yard Sale) pickup.
- ii. Upon receipt of the work order, Business Clerk sends an email to the requestor with the surplus pickup form attached.
- iii. The work order task number should be in the email subject.

b. Processing the Returned Pickup Form

- i. When the completed pickup form is returned by email:
 - Review the form to ensure all required information is complete and accurate.
 - If information is missing or unclear, follow up with the requestor for corrections.
 - Once verified, print the completed pickup form.
 - Attach it to a printed copy of the work order.
 - Place the packet in the designated area for warehouse personnel to complete the pickup.
 - Save an electronic copy of the completed pickup form in the appropriate folder on your computer.

c. Deciding the fate of incoming items

- i. The Business Clerk reviews each item delivered to the Receiving warehouse.
- ii. For each line item on the hard copy form, the clerk determines the appropriate disposition category:
 - Recycled
 - Trash
 - Surplus.

The disposition decision must be documented on the hard copy form and in the corresponding electronic form.

d. If item has a MU tag number:

- i. The Business Clerk will enter the tag number in Banner using the FFIMAST module. This module provides key information about the assets including:
 - The department to which the item is assigned
 - The age of the item
 - Whether the item has been disposed of in Banner
 - Whether the item is fully depreciated
- ii. If a tagged item needs to be disposed of, follow the same procedure used for non-tagged item with the additional requirement:
 - keep a copy of the work order and surplus pickup form to keep in the Fiscal Year disposal folder. The Business Clerk will use this copy to dispose of items in Banner.
- iii. If item is still in working condition, follow these steps:
 - Place the item in the surplus designated asset area.



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- Update the user reference field under FFAMAST (Banner) to reflect the item's new Location.
- Change the location number to 1500, which corresponds to the surplus location.

e. Records Management

- i. All completed pickup forms must be attached as a document to the corresponding work order in Maintenance Care.
- ii. Hard copies remain attached to the work order until the surplus process is fully completed.
- iii. Records must be retained in accordance with Marshall University's records retention policies.

REVISION HISTORY:

- 03/20/26 – Initial Revision.



ATTACHMENT A



ATTACHMENT B



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MU Surplus Property Department Pick-up Form

(Please complete form and email back to Surplus Property)

The property listed below is declared surplus to the needs of this department and is hereby requested to be transferred to Surplus Property

Task #	Date entered:
Dept. name:	Dept. Org:
Person Authorizing Transfer and phone #:	Authorizer email:
Department Rep. acknowledging pick-up: _____	Date: _____
(sign here at time of pickup)	

Please note: Items will not be picked up until this form is completed and returned to sender.

	MU Property tag	Purchased on a Grant? yes or no	Description of Property	Quantity	Does item work? yes or no	Bld. & Rm. #	*Item Fate (Recycle, Scrap, Surplus)
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

*Items with Asterisk are for Surplus Office use only

* Signature of Warehouse Personnel Acknowledging Items have arrived at warehouse: _____	Date: _____
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ATTACHMENT C



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I hereby state that I have read and understood the certifications and agreements by which I am obligated to abide.

Marshall University

Buyer ("Transferee")

X

X

Print: _____

Print: _____

Title: _____

Title: _____

Date: _____

Date: _____



ATTACHMENT D



Marshall University Surplus Property Disposal Form

Items to Be Disposed

Description	Qty	Reason for Disposal	MU Tag # if Applicable	Receiving Personnel Initials	Date
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			
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		Damaged/ Heavily Worn Nonoperational/ Obsolete			
		Damaged/ Heavily Worn Nonoperational/ Obsolete			

Approved by: _____ Date: _____