



U.S. Department of Veterans Affairs

North Florida / South Georgia Veterans Health System

## NF/SGVHS Research Service

# Equipment Inventory/Management

**Updated: 12/03/2023**

### **How does the Medical Center manage inventory?**

Every substantial piece of equipment in the VA has an Equipment Entry (EE) serial number. Every EE number (every piece of equipment) is assigned to an Equipment Inventory List (EIL). Every EIL is assigned to a designee who is responsible for managing the equipment. In Research Service, this is usually an investigator (can be VA-paid or WOC) who oversees inventory for her/his laboratory.\* The ACOS has ultimate responsible for all equipment in Research Service.

When VA-purchased equipment is received by the Medical Center warehouse, a Biomedical Engineering check is done, and a Biomedical Engineering sticker is placed on the equipment. At that time, Supply Chain Management (SCM) applies an inventory barcode sticker to the equipment. The barcode sticker includes the "EE" serial number. The sticker may include a short descriptive name of the item, although the assigned name is often a very poor description of what the equipment actual is.

All equipment is inventoried using a scanning process. In addition to the aforementioned stickers on each piece of equipment, each room also has a barcode sticker at the entranceway (usually within the door frame). When SCM is conducting an inventory, the entranceway barcode is scanned first, followed by scanning of each piece of VA equipment within that room. Scanners are returned to SCM for download into their Automated Engineering Management System/Medical Equipment Reporting System (AEMS/MERS) to track all VA equipment. On a required annual basis, VA Supply Chain Management (SCM) conducts a full inventory of each EIL.

\*Note: Computers and peripherals purchased with VA IT funding will be on an EIL assigned to Information Resource Management (not Research Service).

### **How does Research Service manage inventory?**

It is important for every investigator/lab to have procedures in place for tracking their equipment inventory. **Research Service leaderships asks that all labs maintain an inventory management spreadsheet.** An example entry for such a spreadsheet is shown below. Importantly, the spreadsheet should include a photo of each inventory item, as well as a photo of the location where the item is stored. This makes searching for items much easier. At the end of this document there are instructions for how to properly lock a photo into an excel spreadsheet cell, to prevent the pictures from becoming disorganized when spreadsheet rows are sorted, added, or deleted. As a back-up, the photo of each item should be saved in a separate computer folder with the EE number as the file name. It is recommended that each lab have at least one person who is specifically assigned to inventory management. This person can keep the inventory spreadsheet up to date and meet with SCM during the annual inventory process to guide them to the location of each piece of equipment. An alternative to guiding an SCM employee through the lab is that researchers can request to borrow a scanner from SCM to scan the inventory of their own labs.

If you need to move equipment between different EILs or need to create a new EIL (e.g., for a new lab or investigator), please contact the ACOS for Research Service.



VA equipment can be stored off-site by completing a VA Property Pass form (with ACOS/Research approval). However, this off-site equipment remains VA property and is still subject to annual inventory. It must either be brought back to the VA for inventory, or SCM may allow a current photo of the EE sticker to be used for confirmation purposes.

## Turning in Equipment

Outmoded, inoperable, and unused equipment should be turned in via VA Form 2237. This form is also used to report missing, lost, or stolen equipment. (Note: VA computers should be turned in through the “YourIT” portal.) Bring the equipment and two copies of the completed Form 2237 form to the cage in the warehouse. One copy will remain with the equipment, and the other copy should be signed by the Supply Chain Management employee and kept by the research employee. Scan this signed 2237 and email it to the ACOS/Research ([David.Clark1@va.gov](mailto:David.Clark1@va.gov)).

If you are returning equipment that was on loan from a study sponsor (such as for an industry-sponsored trial), you should also make a copy of the Airway bill that is used for shipping the item back to sponsor/point of origin. Take note of the tracking number, and periodically check for confirmation of delivery. Once delivery is confirmed, take a screen shot of the delivery page from UPS, FedEx, etc. and save it to your study folder. This will serve as confirmation of return. Add date to Inventory Spreadsheet in new column labeled ‘Return Date’.

### Information to Include in Inventory Spreadsheet for Each Lab

| Room       | EIL   | EE#      | Label Name         | Manufacturer and Product Name | Location  | Picture   |
|------------|-------|----------|--------------------|-------------------------------|---|---|
| 153A-12-GV | 39AGV | EE999999 | Computer-Laptop-GV | Artinis Portalite fNIRS       |  |  |

Room: Room Number (e.g., 153A), Building (e.g., 12), Station (e.g., Gainesville).

EIL: Electronic Inventory List (number assigned to Principal Investigator or lab).

EE#: Serial number on the barcode sticker.

Label name: Equipment name assigned by SCM and printed on the barcode sticker; this often has a poor description of the actual equipment.

Manufacturer's product name: Descriptive name that will be recognized by PI and lab staff.

Location: Photo showing location within the room; helpful for equipment stored in a closet, shelf, drawer, etc.

Picture: Photo of actual item as it would appear to SCM staff who are searching for it. See the instructions below for how to lock a picture into a spreadsheet cell.

Other information: Information that could be added if it might also be useful such as PI/Lab name, primary user of the equipment, monetary value, warranty expiration date.

## How to lock a picture into a spreadsheet cell in Microsoft Excel

This feature should work for installed versions of Excel software, but may not work for web-based versions.

- paste a picture into the desired cell
- right click on the picture
- click size and properties
- click on properties
- check the “Move and size with cells” option
- this will allow for row sorting/adding/deleting, and the pictures will stay in their correct cell

