

Subject: Equipment and Materials Held for Future Projects Storage and Review	Effective Date: September 26, 2014	Initiated by: Facilities and Site Services Division
	Supersedes: Revision 2 dated 6/14/04	Approved: Director

Management System (Primary):	08.00 Facilities and Property Management
Management System Owner:	Associate Lab Director for Engineering and Infrastructure
Management Process:	08.01 Personal Property Management
Process Owner:	Associate Lab Director for Engineering and Infrastructure
Subject Matter Expert (SME):	Associate Lab Director for Engineering and Infrastructure; Head of Facilities and Site Services; Head of Material Services

Applicability

This procedure is applicable to all Laboratory and DOE personnel who designate equipment and material to be held in long term storage for future projects.

Exclusions

This procedure does not apply to items placed in Temporary Storage, Records Storage, Excess, Administrative Storage, Spare Parts, or designated as Standby Equipment.

Introduction

Equipment and materials that are not in use may need to be placed or retained in storage for future use by Laboratory personnel. Equipment and Materials Held for Future Projects (EMHFFP) for more than 90 days must be justified, approved, and reviewed annually. Retention of EMHFFP is based on a known or projected need, storage costs, replacement costs, maintenance cost, obsolescence, deterioration, and future availability. Items no longer needed must be excessed or made available for use by others. The EMHFFP program and database provide visibility of property held in storage through the annual review which will contain sufficient detail to support retention by reporting of these assets. Additionally, the Storage Database is available for screening on the Material Services web page <http://material-control.pppl.gov/> which will include original date of classification. **Under “WAREHOUSE - Property in Storage”, right click on “Equipment and Material Held for Future Projects”.** It is DOE Policy that when practicable and consistent with program needs (EMHFFP) be considered as a source of supply to avoid or postpone acquisition. When equipment and material is retained (EMHFFP) for longer than one year, the annual rejustification will be reviewed at a level of management at least two levels above that of the individual making the determination to retain. Equipment and material (EMHFFP) retained longer than three years will be approved by the head of the DOE field organization

Reference Documents

DOE Order 580.1A and Chg. 1 – Personal Property Management Program
 41 CFR 109-28.50 – Management of Equipment Held for Future Projects
 41CFR 109-25.109-1 – Identification of Idle Equipment
 48 CFR 970.5245-1 – Property

Definitions

Equipment and Materials Held for Future Projects (EMHFFP):	Equipment and Material being retained based on an approved justification for a known future use or for potential use in planned project.
Requester:	Individual requesting storage of equipment or materials.
Approver:	Individual(s) who review and approve storage of EMHFFP. (see Attachment 1).
Warehouse Storage Coordinator	Individual in Warehouse Operations Group who administers EMHFFP program.

Procedure

A. Initial Storage Request

<u>Responsibility</u>	<u>Action</u>
Requester	<ol style="list-style-type: none"> 1. Obtains a Storage Request form and preparation instructions (Attachment 1) from the PPPL Warehouse Operations Group (Ext. 2328). 2. Prepares form according to instructions. Forwards Storage Request form to appropriate Approver(s) and submits copy to Warehouse Storage Coordinator.
Approver(s)	<ol style="list-style-type: none"> 3. Reviews initial storage justification for accuracy and validity. Indicates approval by signing form on appropriate line.

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| Requester | <ol style="list-style-type: none"> 4. Forwards the completed Storage Request form to Warehouse Storage Coordinator. 5. Coordinates with Warehouse Storage Coordinator the details of property transfer and the following special storage requirements, if applicable: <ol style="list-style-type: none"> a) Storage environment b) Safety concerns c) Deterioration d) Palletizing or crating e) MSDS or SDS (for hazardous materials) f) Shelf life g) Preventive maintenance (<i>Requesting organization remains responsible for conducting preventive maintenance</i>). |
| Warehouse Storage Coordinator | <ol style="list-style-type: none"> 6. Performs transfer of items to selected storage area. 7. Assigns storage request number (S.R. #) and location. Sends annotated copy of storage request form to requester and Property Coordinator, if applicable. Enters pertinent information in the long-term storage computer database. |
| Property Coordinator | <ol style="list-style-type: none"> 8. Enters storage request number and asset status in Asset Management Computer Business System. |
| Requester | <ol style="list-style-type: none"> 9. Retains copy of Storage Request form for reference. Requests items from storage as needed referencing the original storage request number. |

B. Reviews

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| Warehouse Storage Coordinator | <ol style="list-style-type: none"> 1. Distributes EMHFFP Annual Review report with instructions to Cognizant Divisional Representatives to review items held in storage for one year or more. |
| Divisional Representative | <ol style="list-style-type: none"> 2. Reviews and validates justification for continued storage of listed EMHFFP. Indicates continued storage, surplus, or return to use. Reviews items "in person" if requested. Reviews preventive maintenance requirements (if applicable). Signs, dates, and returns report to Warehouse Storage Coordinator. |

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| Warehouse Storage Coordinator | <ul style="list-style-type: none"> 3. Initiates disposition actions resulting from returned reports. 4. Sends report of all EMHFFP being retained in storage to Department Heads and Procurement Division. |
| Department Heads | <ul style="list-style-type: none"> 5. Reviews report and sends any changes or comments to Warehouse Storage Coordinator for action. |
| Procurement & Department Heads | <ul style="list-style-type: none"> 6. Utilizes listings of EMHFFP as needed as a potential source of supply. |
| Warehouse Storage Coordinator | <ul style="list-style-type: none"> 7. Produces report of EMHFFP stored over three years. 8. Sends three-year report to Deputy Director for Operations for review/concurrence. |
| Deputy Director for Operations | <ul style="list-style-type: none"> 9. Reviews three-year report. 10. Discusses justifications with cognizant manager as appropriate. 11. Notes any changes on report. 12. Approves/disapproves report and returns report to Material Services Branch Head for appropriate action |
| Head, Material Services Branch | <ul style="list-style-type: none"> 13. Submits three year report to DOE Princeton Site Office Manager for approval. |
| Princeton Site Office Manager | <ul style="list-style-type: none"> 14. Approves/disapproves report and returns report to Material Services Branch Head for appropriate action. |

Training

Responsibility Action

Warehouse & Fleet Manager Ensures the following Training is provided.

Target Audience:

Laboratory personnel who retain equipment or materials in storage for future use.

Training Method and Frequency:

- Read only – Upon revision of procedure - Routine distribution/training via e-mail distribution of this procedure to Supervisors by Best Practices.
- Read only – Storage form instructions attached.
- E-mail Distribution – As needed or requested.

Records Requirements Specific To This Procedure

Records Custodians must assure records are maintained as follows:

Record	Record Custodian	Location	Retention Time
Equipment and Materials held for future projects Annual Report	Warehouse & Fleet Manager	Material Services	Delete with related records or when no longer needed for administrative, legal, audit, or operational purposes, whichever is later <i>Reference A20 Electronic Record (9)</i>
Initial Storage Request form	Warehouse & Fleet Manager	Material Services	Delete with related records or when no longer needed for administrative, legal, audit, or operational purposes, whichever is later <i>Reference A20 Electronic Record (9)</i>
Asset Management Computer Business System.	Property Administration Office	Material Services	Delete with related records or when no longer needed for administrative, legal, audit, or operational purposes, whichever is later <i>Reference A20 Electronic Record (9)</i>

Attachments

1. Sample Storage Request Form Example with Instructions

**PRINCETON UNIVERSITY
PLASMA PHYSICS LABORATORY
STORAGE REQUEST FORM**

Date: _____ S.R. #: _____

Department: _____ Division: _____ Section: _____

Justification for storage: _____

Length of Storage: _____ Where has Material Been Used? _____

Indicate condition: _____ Preventive Maintenance? Yes No - If yes, describe below.

Property #	Qty	Description	Standard Cat. Item	Special Or Fab.	Value

Requested by: _____ Date: _____

Approved by Section Head: _____ Date: _____

Approved by Division Head: _____ Date: _____

(Up to one year)

Approved by Department Head: _____ Date: _____

(One year or more)

DO NOT WRITE BELOW THIS LINE

Materials Received by: _____ Date: _____

Storage Location: _____ Tag Number (s) _____

Disposition: _____

Additional Information: _____

Instructions in the Preparation of a Storage Request Form

Department: Indicate the department from where request is initiated, e.g. NSTX Project, Plasma Science & Tech., Engineering and IT Department, Experimental, or ESH&S, etc.

Division: Indicate the division from where request is initiated e.g. Engineering Operations, MRX, CDX-U, Diagnostics, Mechanical Engineering, Procurement, etc.

Section: Note the section having direct cognizance over storage item.

Date: The date the request is initiated.

Justification for storage: Justification shall be in sufficient detail to support retention of the equipment. This justification must cite the specific project or potential future use.

Duration of storage: The anticipated length of time that the item is to be stored.

Condition: That is: new, excellent, good, fair, poor, etc.

Needs Preventive Maintenance: Check in box “yes or no”. If yes, indicate the frequency and describe the required maintenance. **Requesting organization remains responsible for conducting preventive maintenance.**

Where has the material been used?: Indicate Area, Room, Machine, Experimental Device, etc.

Quantity: Enter total quantity of each line item.

Property Number: Enter property tag number of the equipment (If equipment)

Description: A description of the item should be as complete as possible and include serial number, model, year, manufacturer, capacity, etc. All other pertinent information not covered in other parts of the request is recorded here. Attach other drawings, specs, etc. (as necessary).

Standard Catalog Item: Place a check () in this column if the item is a standard commercial item.

Special or Fabricated Item: Place a check () in this column if the item was specially made or fabricated for or by the laboratory.

Value: The total value of each line item may be actual or estimated.

Requested by: Signature of authorized individual requesting storage.

Approved by: Storage Requests are approved by the responsible Section Head for up to six months, the Division Head (up to one year), and the Department Head for one year or more. Forward Storage Request form to appropriate Approver(s) and submits copy to Warehouse Storage Coordinator.

The link for this form is: http://material-control.pppl.gov/storage_form_instruct.doc