



UNIFORMED SERVICES UNIVERSITY OF THE HEALTH SCIENCES



SUBJECT: Loan, Transfer, and Removal of Property from the USU Campus and all Satellite Locations

Instruction 4100

FEB 29 2016

(LOG)

ABSTRACT

This Instruction establishes guidelines for the loan, transfer, and removal of property (and equipment) from the Uniformed Services University of the Health Sciences (USU) Campus and all satellite locations.

A. Reissuance and Purpose.

This Instruction reissues USU Instruction 4100 (Reference a) and provides policy, guidelines and instructions for the loan, transfer or removal of USU owned government property within and from USU, to other Federal agencies, to employees of the Federal government, and to the Henry M. Jackson Foundation (HJF). This Instruction also provides policy for the entrance and removal of personal property to and from USU and its satellite locations.

B. Reference. *See Enclosure 1.*

C. Policy.

1. It is USU policy to loan or transfer Government property within USU, to other Federal government agencies, to USU employees, and to HJF for "official government use only." Loaned property will be for a period not to exceed one year. The Director, Logistics Division (LOG) or higher authority must authorize in writing exceptions to this policy.

2. The movement of all property must be approved by the USU appointed Accountable Property Officer (APO) and Department Chair/Activity Head/Principle Investigator via USU Form 5306, "USU Equipment/Furniture Request." *See Enclosure 2.*

D. Applicability. This Instruction is applicable to all USU (to include AFRRI) and HJF employees on the Bethesda campus as well as all satellite locations.

E. Responsibilities.

1. The USU APO is responsible for the issuance of USU Form 5306 and maintaining current records of all government property on loan.

2. The Department Chair/Activity Head/Principle Investigator and their respective Property Custodians, (both Primary and Alternate) are responsible for maintaining internal records on all loaned property. Records of loaned property will be made available at time of inventory.

3. All USU Security Guards have the authority to request to review/inspect all property being transported from the University. Individuals may be asked to provide appropriate documentation before removal.

F. Procedures. *See Enclosure 3.*



Charles L. Rice, MD
President

Enclosures:

1. Reference
2. USU Form 5306 "USU Equipment/Furniture Request"
3. Procedures
4. DD Form 1149 "Requisition and Invoice/Shipping Document"

REFERENCE

(a) USU Instruction 4100, "Loan of USU Property," dated May 3, 2011, (canceled).

USUHS EQUIPMENT/FURNITURE REQUEST					DATE	
REQUEST FOR: <input type="checkbox"/> ISSUE <input type="checkbox"/> TURN-IN <input type="checkbox"/> TRANSFER <input type="checkbox"/> PROPERTY PASS (Only 1 type per request)					DATE REQUIRED	
ACTIVITY OR DEPARTMENT			PROPERTY ACCOUNT NO.		TELEPHONE NUMBER	
SIGNATURE OF PROPERTY CUSTODIAN			FOR PROPERTY PASS ONLY SIGNATURE			
TAG NUMBER	DESCRIPTION	From Acct. No. Location	To Acct. No. Location	Equipment No.		
LOGISTICS USE ONLY		RECEIPT OF PROPERTY ACKNOWLEDGED				
DATE RECEIVED	LOG CONTROL NUMBER	SIGNATURE OF LOSING CUSTODIAN				
APPROVING AUTHORITY		SIGNATURE OF WAREHOUSE			DATE	
POSTED INIT. & DATE	QC INIT. & DATE	Property Received by/Signature of Gaining Custodian			DATE	

USUHS FORM 5306 (REV) (LOG) 09/03
Preparation Instructions on
reverse Side of Number 5 copy

1. Property Management Branch's Copy OR Property Pass

This 5 Part Form is available from the PMO's Office

PROCEDURES

1. Loan of USU Owned Property (and Equipment)

a. All requests to loan USU (to include AFRRI) government owned property, to another department within USU, to another government agency, to an employee, or to the HJF will be documented on USU Form 5306, "USU Equipment/Furniture Request." *See Enclosure 2.*

b. The following information must be included on the form:

1) Blocks 1-15 will be completed and signed by the Property Custodian (Primary or Alternate) or Department Chair/Activity Head/Principle Investigator and will include an expiration date of no more than one year from the time of issuance.

2) All property loans must be approved by the USU APO who will sign Block 19 (Approving Authority). The APO may require a supporting memorandum to further clarify the circumstances of the loan.

3) Property on loan to a department, employee, government agency or HJF must be updated annually with a newly signed USU Form 5306.

a) The loan is year to year and at some point the equipment is either obsolete, returned or retrieved by the loaning department. The PMO is involved in determining duration of loan.

4) When more than one item is loaned to the same entity, a list of those items may be attached to a single USU Form 5306 reflecting all pertinent data.

5) Distribution of USU Form 5306 is as follows:

a) USU Form 5306 Number 1 Copy will be retained by the PMO.

b) USU Form 5306 Number 2 Copy will be retained by the PMO.

c) USU Form 5306 Number 3 Copy will be provided to the borrower.

d) USU Form 5306 Number 4 Copy will be provided to the loaning department.

e) USU Form 5306 Number 5 Copy will be retained by the PMO.

6) When retention of the loaned property is no longer required, the item or items will be returned to the original Property Custodian who will acknowledge receipt by signing the Number 3 Copy. The borrower will return their Number 3 Copy to the PMO.

7) The Department who is re-gaining their property will sign their Number 4 Copy acknowledging receipt and return their copy to the PMO. A copy of this action will be maintained in the Property Custodian's records until the next scheduled inventory, following which, it may be disposed of as appropriate.

2. Permanent Transfer of USU Owned Property (and Equipment)

a. The permanent transfer of USU owned property to another department within USU will be accomplished using USU Form 5306 and approved by the USU APO.

b. The permanent transfer of USU owned property to an outside government agency first requires the submission of a memorandum through the Department Chair/Activity Head/Principle Investigator to the USU APO for approval. The memorandum must include manufacturer, model number, serial numbers, USU Property Tag information, approximate age and value of the equipment.

c. The APO will review the property records to verify the funds utilized to purchase the item(s). After verification has been completed, the memorandum will be approved/disapproved.

d. If approved, a DD Form 1149 "Requisition and Invoice/Shipping Document" will be completed by the APO and accompany the transferred property. *See Enclosure 4.*

e. This memorandum and DD Form 1149 will include the following information:

1) Manufacturer, Make, Model, and Serial Number(s) of items.

2) USU ID Number(s).

3) USU Purchase Order Number(s).

4) Justification for Transferring the item(s).

5) The Exact Final Destination.

6) Authorized Signatures

f. Before an item may be transferred to another agency, the item must be made available to USU activities, a USU-Staff e-mail will be sent for the advertisement of the item throughout the USU community. If another USU activity has a requirement, the item may not be transferred. If no requirement exists, then the item may be transferred.

g. Exception. If there are compelling scientific reasons as to why an item must be directly transferred to an outside activity (and thus by-pass re-utilization within USU), then the responsible Department Chair/Activity Head/Principle Investigator must submit a justification to the Vice President for Finance and Administration (VFA) via the APO and Director, Logistics Division.

3. Loan or Transfer of HJF Owned Property (and Equipment)

HJF has an on-site property custodian (301-295-3760) who will address questions concerning the loan or transfer of HJF owned property not covered by this instruction.

4. Non-Government Property

a. USU employees who bring personal property onto the USU campus and satellite locations will identify those items to their department Property Custodian so that upon removal, it can be verified that this is personal property and does not belong to the government. Personal property remaining on campus or a satellite location for more than 30 days must be identified to PMO so that the property can be identified when being removed. The personal property tag must be returned to PMO.

b. Property, being removed from the USU campus or a satellite location by an employee, is subject to inspection by Security. The employee will be asked to provide appropriate documentation before removal is authorized.

SHIPPING CONTAINER TALLY 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

REQUISITION AND INVOICE/SHIPPING DOCUMENT										OMB No. 0704-0243 OMB Approval Expires Apr 30, 2009	
<p>The public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Department of Defense, Executive Services Directorate (0704-0243). Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.</p> <p>PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ORGANIZATION. RETURN COMPLETED FORM TO THE ADDRESS IN ITEM 2.</p>											
1. FROM: (Include ZIP Code)						2. SHEET NO.	3. NO. OF SHEETS	4. REQUISITION DATE	5. REQUISITION NUMBER		
3. TO: (Include ZIP Code)						7. DATE MATERIAL REQUIRED (YYYYMMDD)			8. PRIORITY		
3. SHIP TO - MARK FOR						9. AUTHORITY OR PURPOSE			10. SIGNATURE		
						11. VOUCHER NUMBER & DATE (YYYYMMDD)			12. DATE SHIPPED (YYYYMMDD)		
						13. MODE OF SHIPMENT			14. BILL OF LADING NUMBER		
						15. AIR MOVEMENT DESIGNATION OR PORT REFERENCE NO.					
4. APPROPRIATIONS DATA										AMOUNT	
ITEM NO. (a)	FEDERAL STOCK NUMBER, DESCRIPTION, AND CODING OF MATERIAL AND/OR SERVICES (b)					UNIT OF ISSUE (c)	QUANTITY REQUESTED (d)	SUPPLY ACTION (e)	TYPE CON-TAINER (f)	CON-TAINER NOS. (g)	TOTAL COST (h)
											0.00
											0.00
											0.00
											0.00
											0.00
16. TRANSPORTATION VIA AMC OR MSC CHARGEABLE TO						17. SPECIAL HANDLING					
RECEIVED BY SHIPMENT	ISSUED BY	TOTAL CON-TAINERS	TYPE CON-TAINER	DESCRIPTION	TOTAL WEIGHT	TOTAL CUBE	18. CONTAINERS RECEIVED EXCEPT AS NOTED	DATE (YYYYMMDD)	BY	SHEET TOTAL	
	CHECKED BY						19. QUANTITIES RECEIVED EXCEPT AS NOTED	DATE (YYYYMMDD)	BY	GRAND TOTAL	
	PACKED BY						20. POSTED	DATE (YYYYMMDD)	BY	20. RECEIVER'S VOUCHER NO.	
	TOTAL										

DD FORM 1149, JUL 2006 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

PREVIOUS EDITION IS OBSOLETE.

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