

## **Equipment Inventory**

### **Annual Inventory Reporting**

Maintaining an accurate inventory is essential for many reasons. Not only is it necessary to understand the potential need for equipment storage and repair, it is especially important when allocating additional equipment so that the best and most efficient use of all equipment can be made.

***By May 15 of each year, the TCS must update the state's equipment inventory list and transmit an email with the inventory spreadsheet to the National Office ([TaxAideTech@arp.org](mailto:TaxAideTech@arp.org)) with copies to the State Coordinator and Regional Coordinator.***

The Policy Manual section on equipment details the TCS responsibility for maintaining a written inventory of all the equipment use in the program.

The inventory reporting requirements at the end of the season do not apply to IRS computers unless they are retained during the off-season (requires pre-approval from the TCS and the IRS Depot, and it is rarely given). During the season, the TCS should know where all equipment is located. A sample Loan Agreement form, which can be modified locally, is available on the Extranet. (<http://www.arp.org/sk/taxaide/technology.html>)

AARP-owned equipment, donated equipment, equipment purchased at the local level with donated funds and equipment purchased by National Office should be part of the reported inventory. This equipment includes desktops, laptops, printers, and projectors. If you use separate monitors, you may want to consider inventorying them locally, but monitors do not need to be included in the national inventory.

### **Asset Tags**

All AARP owned equipment must have an asset tag to aid in tracking inventory. ***This includes equipment received by donation.*** Asset tags can be developed locally, but should not contain the word "Tax" or "Tax-Aide". "Property of AARP Foundation" or just "AARP" is OK.

If your state already has a system that tracks equipment by asset numbers there is no need to modify it. However a suggested format for asset numbers is:

TSSSDD####

Where T stands for AARP Tax-Aide

SSS is the state, for example CA4, OR1, etc.

DD is the District number or the identifier within the state

And #### is a "sequence" number.

This results in a "number" that is the same length as the IRS barcode number and should be unique. The number would stay in place even if the computer (or printer) got moved to another District or State. Note that the letter "T" should precede the asset tag number for any new AARP supplied computers (e.g. TXXXXXXXX) where xxxxxxxx is the number shown on the asset label attached to the computer.