

Central Receiving

User Guide
2006



Welcome To Central Receiving

This User Guide serves as a source of instruction and reference to UTMB administrators, supervisors, and staff for uniform Central Receiving procedures.

The User Guide will walk you through the steps necessary to arrange for the receipt of items ordered by your department and follow-up on damaged or otherwise inappropriate merchandise. You will also learn the process by which Central Receiving receives and inspects your orders.

Our services include:

- Receiving purchase orders shipped to our main Central Receiving dock at 14th and Strand, and creating a receipt in the PeopleSoft system.
- Inspecting items received for quantity, quality, condition, and any special specifications as indicated on the purchase order;
- Informing Delivery that items are ready to be delivered to the requesting department;
- Assisting with processing loss, shortage and damage claims and returns to the freight carriers and vendors;
- Assisting with the prompt payment of vendors.
- Routing all shipments (purchase order and non-purchase order shipments) received at our main dock.

Table Of Contents

General Information	
Hours of Operation and Location.....	1
Mailing Address	1
Phone Numbers.....	1
The Receiving Process	
Receipt of Material By Central Receiving	2
Direct Receipt By Department	2
Inspection By Department	2
Incorrect Item.....	3
Damaged Or Unsatisfactory Shipments	3
Perishable Or Sensitive Items	3
Personal Items.....	3
COD Packages.....	3
Addressing Packages.....	3
Temporary Storage	4
Package Inquiry	4
Inventory Tagging Controlled and Capital Assets	5
UTMB Policy	
Inventory Tags	6

General Information

Hours Of Operation

Monday - Friday, 8 a.m. - 5 p.m.

Please call for holiday hours

Location

14th Street and Strand
Materials Management Warehouse
West end

Mailing Address

Our campus US mail address is:

TO: ATTENTION LINE (name of person)
CENTRAL RECEIVING - ROUTE 1027

Our incoming US mail address is:

NAME OF PERSON (optional attention line)
CENTRAL RECEIVING - 1027
THE UNIVERSITY OF TEXAS MEDICAL BRANCH
301 UNIVERSITY BLVD.
GALVESTON, TX 77555-1027

Our campus ship to address is:

University of Texas Medical Branch
Central Receiving
14th and Strand
Galveston, Tx 77555-1027

Internet Address

<http://www.utmb.edu/logistics>

On the Logistics home page click "Central Receiving"

Phone Numbers

General information... order discrepancies, package tracking, problem resolution, etc.

(409) 772-5340

(409) 747-2243

Fax

(409) 772-3693

The Receiving Process

Receipt Of Material By Central Receiving

Materials will be processed through Central Receiving on a First In First Out basis unless the nature of the material dictates special handling. Cartons are opened as necessary to determine that the correct item and quantity is present, as specified by the vendors packing slip and UTMB purchase order.

Special handling exceptions may include:

- all air and overnight shipments
- materials on dry ice or frozen
- live materials
- blood and blood platelets
- packages labeled “refrigerate immediately,” “freeze upon arrival” or “special handling” instructions. Also included are radioactive materials and controlled substances.

Items that cannot be processed by Central Receiving include the following:

- Live animals. Any department ordering live animals should make arrangements to have them delivered directly to the department’s desired location.
- Items ordered by contractors for work being done at the University. These items are to be delivered by the carrier directly to the contractor.
- Select agents.

The following steps and procedures are performed by Central Receiving staff:

1. A visual inspection for damage to the carton or container at the time it is off-loaded from the carrier truck.
2. Verify the number of packages indicated on the freight bill.
3. Enter the item into the Supply Chain Logic (SCL) tracking system, which will track the item throughout the receiving and delivery process. The item is classified as “Docked” at this stage in the process.
4. Create a label in the tracking system and label the package so that it can be tracked throughout the rest of the receiving and delivery process.
5. Conduct a more thorough inspection of the contents of the packages to look for obvious damage to

the item in the carton or container, overages or shortages or items that do not match the list on the packing slip.

6. Enter the item, along with any discrepancies, into the PeopleSoft system for Acquisition tracking.
7. Alert Delivery to the presence of the package and need for delivery to the requested campus location.

For information on the process once Delivery takes custody of the package, please see the Delivery User Guide.

Direct Receipt By Department

When a purchase order item is delivered directly to the department, a representative for the department should do a receipt in PeopleSoft. If the department cannot do this, Central Receiving must be notified immediately of the receipt of any material which requires processing by Central Receiving in order to close the order and allow for the process of payment to vendor. Failure to do so may cause delays in payment to vendors.

Inspection By Department

Delivery is responsible for distributing packages from Central Receiving to the ordering departments. For more information on this process, see the User Guide for Delivery.

Once a package has been delivered to the department, a representative must inspect the contents as soon as possible (ideally, within 24 hours) for concealed damage, unidentifiable items, items not conforming to specifications or other discrepancies.

If the material or equipment must be installed to verify if it is acceptable, the department should arrange to have this procedure completed as soon as possible.

If there is damage, the representative should contact Central Receiving, at 772-5340, within 24 to 48 hours of receipt for assistance in filing a claim with the carrier. The department should preserve all portions of the container and wrappings.

If a shipment is not correct, the department should follow these procedures:

- For all Small Order System (SOS) Purchase Order changes, please e-mail your changes to purchsos@utmb.edu or fax to 747-8030.

- For changes to Formulary orders, please call the Problem Resolution Desk, at 747-8025.
- For changes to Materials Management orders, please call the Customer Service Desk, at 772-5364.
- For orders placed by Acquisition, please mail (to route 0905), fax (to 747-8030), or e-mail your buyer in Acquisition a memo stating the problem and the responsible buyer will issue a change order to the vendor.

Incorrect Item

Always verify your order upon receipt. Notify Central Receiving immediately of any discrepancies related to delivered material. Failure to notify Central Receiving promptly may delay payment to vendors. If you receive an incorrect item, please notify Central Receiving within 24 to 48 hours of the problem.

Damaged Or Unsatisfactory Shipments

Sometimes a shipment arrives with a problem, which may include damage, missing items, overages, or shortages. All problems with shipments must be reported to the vendor or carrier, depending on the nature of the problem. If a problem most likely occurred in transit, such as damage to the container, then a freight claim will need to be filed with the carrier.

If it is obvious to Central Receiving that a shipment is damaged, Central Receiving will notify the carrier and file the appropriate claims. Immediate action is necessary to comply with the time limits set by carriers for filing damage claims.

For items not conforming to specifications, unidentifiable merchandise, overages, or shortages, Central Receiving will contact Acquisition, and they will contact the requesting department and vendor to work out the problem.

If a problem is not discovered until after the item is delivered to the requesting department, see Inspection by Department.

Perishable and Sensitive Items

Frozen, refrigerated, or otherwise perishable or sensitive items require special processing and expedited service. Central Receiving will take every precaution to protect these items, and they will be given priority for timely delivery to the requesting departments.

If a department wishes to flag a particular package for priority delivery, please contact Central Receiving at 772-5340.

Departments are also permitted to send representatives to the warehouse to pick up items if they are needed right away.

Personal Items

If personal items are shipped to Central Receiving, we assume no obligation for reporting damage claims, claiming concealed damage, or reporting incorrect shipments.

COD Packages

Central Receiving will not accept COD or "Bill to Receiver" packages.

Addressing Packages

Packages not properly addressed may not be accepted by Central Receiving or may not make it to the requesting department as quickly as it should. Please adhere to the following guidelines regarding proper addressing of packages by vendors.

Inside Deliveries

- Package must be marked by the vendor on the outside of the package.
- Recipient's name (first and last) must be on the package.
- Recipient's telephone extension must be on the package.
- Recipient's building, room number, and "L" number must be on the package.

Deliveries to Warehouse

Purchase Order-Related Packages

- P.O. number should be clearly marked on the outside of the package and on the packing slip.
- All packages must be delivered with a packing slip on the outside of the box.
- Recipient's name (first and last), department, telephone extension, and building and room number should all be listed on the box and/or packing slip.

Non-PO / Credit Card Related Purchases

- Packages must have the recipient's name (first and last) and telephone extension.
- The recipient's physical address (building, room number, and "L" number) must be clearly marked on the outside of the package(s).

Temporary Storage

Central Receiving does not have a designated area for storage of received materials. However, under certain circumstances, departments may make special arrangements with Central Receiving by calling us at 772-5340.

If approved, arrangements may be made to store materials for up to two weeks. These arrangements should be made prior to scheduled delivery. Prior to storage, a department representative must sign for the package and validate its contents.

Package Inquiry

If a department needs to inquire about a package not yet received, a representative may call Central Receiving, at 772-5340, Delivery, at 772-5327, or Mail Services, at 747-3268 to receive more information.

When calling to inquire about a package, please have the following information available:

- Purchase order number, if applicable
- Name and address of sender
- Carrier name (FedEx, Airborne, UPS, etc.)
- Carrier assigned tracking number
- Department and recipient at UTMB
- Building, room number, and "L" number** where the package is to be delivered
- Information on who at UTMB may have signed for the package and when

Every room on campus has been assigned an "L" number, and it is located on a bar coded sticker on the center hinge of the door to the room. It should be visible when the door is open. If you are unsure about an "L" number, you can also access the online lookup guide.

Inventory Tagging Controlled and Capital Assets

All capital or controlled assets delivered to the Central Receiving dock will be tagged by a Central Receiving employee.

Not all assets received at our dock can be tagged by our Central Receiving staff, typical exceptions include:

1. Equipment that is packaged in a manner that results in Central Receiving personnel being unable to access the equipment (e.g., merchandise in wooden crates, merchandise sealed in bolted cartons, etc.).
2. Capital equipment set up as a lot purchase.
3. Equipment sent as part of a system (Central Receiving personnel would not know what personal computer to tag)
4. Special request by department / vendor / sales representative, not to open or disturb packing. Merchandise will be delivered without package being opened.
5. Once equipment is delivered and set up, the department must notify Finance as soon as possible.

Controlled assets are property classes that the State Comptroller requires to be reported to the State Property Accounting System each fiscal year. These assets have an acquisition cost of \$500 to \$4,999.99 with one exception. Hand guns, rifles and shotguns are controlled regardless of the acquisition cost.

Controlled assets include:

- Hand guns
- Rifles, Shotguns
- Stereo Equipment
- Camera
- Television
- VCR Player
- Laserdisk, DVD
- Camcorder
- Computers-Desktop PC
- Printers
- Computer-Desktop-Apple
- Projectors- Data
- PDA-Palm Pilots, etc.
- Computer-Laptop
- Computer-Laptop-Apple

Capital assets are property classes that the State Comptroller requires to be reported to the State Property Accounting System each fiscal year. These assets have an acquisition cost of \$5,000 and greater. Depreciation associated with capital assets is recorded

in to the General Ledger. These assets are also reported on the Annual Financial Report.

Equipment that is delivered directly to the department will need to be secured by department personnel, and a department representative must contact Finance – Plant, Property and Equipment within three days of receipt.

If a controlled or capital asset item is delivered by our Delivery team without an inventory tag please call Central Receiving at 772-5340.

If a controlled or capital asset item is direct received by your department please call Asset Management at 747-7282.

UTMB Policy 4.7.3 - Inventory Tags

Audience

The information in this document is for use by all employees responsible for maintaining inventory of departmental property.

Policy

Logistics department personnel assign and affix UTMB bar coded Asset tags to all capital and controlled equipment delivered to Central Receiving. Departments are required to notify the Office of Accounting, Plant, Property & Equipment division of any capital or controlled equipment delivered directly to the department for immediate tagging.

Guidelines

- Delivery to Central Receiving – All UTMB equipment identified as capital or controlled in the requisition/ purchase order process will be tagged upon receipt at the dock by Logistics personnel.
- Delivery Direct to Department – Upon signing the receiving report, the department accepts responsibility to
 - Secure the asset upon arrival
 - Record serial number and location
 - Notify the Office of Accounting, Plant, Property and Equipment division to tag the asset within three (3) days of receipt.
- Capital equipment, i.e., non-consumable property valued at \$5,000.00 or more and with an expected useful life of one year or more, must a UTMB bar code asset tag affixed to it.
- Certain non-capital equipment (controlled assets established by UTMB or the state) valued at less than \$5,000.00 must have a

UTMB bar code asset tag number for tracking purposes.

- If an asset tag could interfere with equipment operations, or if it is impossible to affix a tag, a UTMB Asset tag number will be assigned. The equipment's serial number will serve as the identifying number for future reference.
- Equipment owned by the Federal Government shall be identified to indicate Federal ownership so that such marking complies with OMB Circular A-110, Subpart, Section .34 and with Federal Acquisition Regulation, Subpart 45.5.