Process Name: Receiving Merchandise
Date: 7/27/05
Time: 10:00am
Location: SR207
Participants: Entire Finance Team
Session Lead: Tina Burlew-BPA, Dave Megregian-Narrative

Narrative/Desc:

- Alpine - Central hub for all packages. Sort out information and send out to the field. When packages are unloaded, verify that they should be SRSU. Non SRSU packages are returned. SRSU inspected packages are signed-off on UPS delivery sheet. UPS is redirected for contractors and Students. Packages are sorted by P.O. (maybe a free book to a Professor without a P.O.). Items entered into a spreadsheet. P.O. items are matched against the P.O.. If it is not a P.O., items sorted for delivery. After P.O. is verified, also go to sort for delivery. If the P.O. does not match or does not have one, contact purchasing and do research using Image now to investigate. All items that do not match, purchasing contacted. Spreadsheet amended to include date, carrier received by, tracking number of carrier, location, brief description, department, vendor, etc. to prepare for delivery. Print out spreadsheet document and put on clipboard. During the sort process, if the item is a fixed asset (capitalized) property inventory is notified. If delivery goes to the department they open the item. They are responsible for inspecting/rejecting the item but they can refer it to purchasing for correction, etc. If the end user received an item with a P.O., the purchasing department is notified. If it is a p-card purchase, this gets addressed in the p-card process.
- Rio Grand – All receiving goes to business operations assistants "BOAs" (formerly cashiers plus they do more). Inspect the merchandise to make sure it is SRSU. If it is SRSU-RGC, it is inspected for damage. Just as like Alpine, only the outside of the box is inspected. If it is NOT SRSU they it is returned to the carrier. If it is damaged goods, it is rejected, departments are informed, and the package is returned the carrier. If package is not damaged then SRSU-RGC sign off for the package and BOAs check for PO to verify information for final delivery location and the fixed-asset check is performed. If it is a fixed asset, then the box is opened and the merchandise tagged. Both the Fixed asset and non-fixed asset are logged onto a spreadsheet. Then, end users are notified to pick up their merchandise. If the package is received by the department, for example OIT, they sign off for the package; compare PO with the merchandise received. If package is correct then department sign the pink and green copy of the PO and notify BOAs and send them the pink copy.
- Electronic Inputs:

Manual/Paper Inputs: Package with Packing slip.
Key Decision Points (list all):
Related Policy(s):

Interface to Other Systems: Jessie has a manual spreadsheet.

Web Features:

Electronic Outputs:

Manual/Paper Outputs:

Customer(s): Receiving department, end user, purchasing

Regulatory Items:

Frequency/Volume:

- Alpine – 60 packages per day (200+ at the start of the fall semester and 500+ after Christmas.

Potential Break Points: When merchandise is sent to an end user and they accept the item and do nothing.

Automation:

Issues:

- There is a void in knowing exactly what happens when items are shipped/delivered right to the user.
- There is currently no process in place if a fixed asset is delivered directly to the department.
- If a package is received with a department and no P.O., there are no checks/balances for researching a P.O.