UTDBP3067 - Receiving and Delivery
Policy Statement

General Policy

Central Receiving and Delivery personnel give continuous attention to the variety of materials that pass through this service. They also provide the Accounts Payable and Purchasing Department with receiving information electronically via the Financial Information System (FINS).

Distributions of freight/materials are usually carried out within one (1) day of their receipt by Central Receiving. Receiving information is entered into UTD’s FINS System as well as Receiving’s PackTrac software.

Delivery personnel make every effort to locate the requesting department or individual before returning the freight/material to Central Receiving for delivery coordination (see Holding Received Merchandise).

Partial and complete shipments are handled in the same manner.

All material is processed on a "first received-first delivered basis" unless the nature of the material requires special handling.

Consult this manual for policies and procedures concerning:

1. Alcohol, Tax Free
2. Capital Equipment
3. C.O.D. Freight/Materials
4. Explosives
5. Gases, Cylinder
6. Narcotics and Dangerous Drugs Used in Research
7. Nitrogen, Bulk
8. Radioactive Material

In the event of an extraordinary situation, telephone Receiving/Shipping at ext. 2779 or at Callier, ext. 3021.

Receiving Procedure

A. UTD/Richardson - UTD/Callier Center Receiving Procedure:

1. Count the number of cartons and/or items at the time of delivery.
2. Record this number on the freight bill or delivery document.
3. Inspect each carton and/or item for damage in the presence of the delivery driver.
4. Note any overage, shortage, and/or damage on the freight bill or delivery document; this requires the delivering driver's signature.
5. Match up the information from the purchase order (see Exhibit F1) with the incoming material. This can be done by checking the purchase order number on the:
   a. Shipping label
   b. Vendor label
   c. Shipment packing list.
6. When applicable, count the number of items contained in each carton.
7. Inspect these items for overage, shortage, and/or damage.
8. Enter receiving information in the Financial Information System (FINS). (See Exhibit F2.)
9. Stage merchandise for delivery to departments.
10. Make delivery to department and secure signature acknowledging receipt.

B. Exceptions and Limitations to Acceptance:

1. Items delivered on a "Furnish & Install" basis should be acknowledged as received by the department in which the goods are received. This can be done by faxing a copy of the purchase order with your signature and "received complete" written clearly to ext. 2434 (Receiving).
2. Services ordered on a purchase order should be acknowledged as received as described in Item #1 above.
3. Paperwork related to receipts of Small Order System (SOS) orders are retained by the requisitioning department and subject to internal audit.

Holding Received Merchandise

If merchandise received at the Receiving Office cannot be identified or matched with a purchase order, it will be held for fourteen (14) calendar days from date of arrival. If at the end of that time all methods of search have failed to determine who requested the goods, Purchasing or Receiving (depending upon the item/s involved) will begin negotiations with the vendor for the return of those goods.

Delivery Procedure

The University normally is allowed to return freight/material within fourteen (14) days from date of receipt. Therefore, it is imperative that the requesting department or individual examine all deliveries.

To facilitate these matters, Receiving personnel proceed in the following manner when making deliveries:

1. Obtain the print screen of the receiving information for the purchase order from the Financial Information System (FINS).
2. Attach the packing slip(s) to the receiving "print screen."
3. Deliver the freight/material to the individual shown on the purchase order.
4. On the receiving "print screen," obtain the signature of the person accepting delivery.
   **Note:** Signing the "print screen" acknowledges receipt of merchandise and authorizes payment.
5. Enter the receiving information in FINS, which electronically informs the appropriate channels (Accounts Payable and Purchasing). (See Exhibit F2.)

A. Limitations:
   1. Delivery personnel do not stock shelves or supply cabinets.
   2. In the event of overage, shortage, or damage, Receiving personnel may not make a delivery to the requisitioner until clearance has been given by the Purchasing Supervisor or his/her authorized designee.

Damaged Freight/Material

A. General Policy: To comply with the grace period for filing a damage claim, each item should be inspected within three (3) working days of receipt of merchandise.

   Damaged material may not be used or disposed of without permission of the carrier and supplier. Do not dispose of shipping container or packing material.
There are three (3) damage classifications:

1. **Visible Damage**: Due to damage to the shipping container, readily detectable by visual inspection at the time of delivery.
2. **Concealed Damage**: The same type of damage as visible damage, but not detectable until the carton is opened.
3. **Hidden Damage**: Not outwardly visible; detected after delivery to the requesting department or individual. Hidden damage may be detected after technical inspection or after the material is placed into operation.

**B. Procedures**: The procedures for dealing with damaged material are as follows:

1. **Visible Damage**:
   a. Before the delivering driver leaves, make a joint inspection of any material arriving in a damaged carton/container.
   b. On the freight bill (or other delivery document) driver must:
      1. Indicate the damage
      2. Date the notation
      3. Sign the notation.
   c. Place the damaged material, shipping carton, and any inner packing in the holding area. Do not deliver damaged material under any circumstances.
   d. Telephone the requesting department to notify them that material ordered on Purchase No. "X" has been received in damaged condition.
      **Note**: In the event that only a portion of the shipment is damaged, the Receiving Supervisor or his/her designee may sometimes authorize delivery of the undamaged material.
   e. Notify the carrier of the damaged freight.
2. **Concealed Damage**: When detected, follow the same procedure as in the case of Visible Damage.
3. **Hidden Damage**:
   a. Upon notification by the requesting department, pick up damaged material if necessary.
   b. Immediately notify the vendor and shipper.
   c. Arrange for shipment if necessary and/or inspection.
4. **Limitations**: If required, repacking arrangements are the responsibility of the requesting department.

**Capital Equipment**

Capital equipment is defined as personal property with a single unit value of $5,000 or greater and an estimated useful life of more than one year. Please note that state law requires that all equipment, regardless of value, must be marked or tagged as property owned by the State of Texas.

The procedures for receiving capital equipment are as follows:

**A. For the UTD Campus - Richardson**:
   1. Match up the purchase order with the receiving document(s).
   2. Notify the Property Administrator, etc. 2150, that equipment has been received.
   3. Hold the capital equipment for inventory procedures by Property Administration personnel (issue and affix property tags).
   4. Upon release by Property Administration personnel, follow the usual receiving and delivery procedures.
B. For the Callier Center Campus - Dallas:
   1. Property Administration personnel attach the property tags and complete data worksheets.
   2. Follow the usual receiving and delivery procedures.
   3. By intercampus mail, send all receiving documents (except SOS's), including packing slips and invoices, etc., to Procurement/Accounts Payable (AD34) at the UTD campus, Richardson, Texas.

C.O.D. Freight/Material

A. UTD - Richardson: Ordering goods C.O.D. is discouraged. In the event of a C.O.D. delivery through the U.S. Mail or Central Receiving, Receiving personnel will:
   1. Determine if an Accounts Payable check is available. If not, contact department placing C.O.D. order and ask them to make arrangements to provide C.O.D. payment.
   2. Follow the receiving procedure outlined in this policy.

   Note: For other types of C.O.D. shipments, see UTDBP3058.

B. Callier Center:
   2. Follow the receiving procedure outlined in this policy.

   Note: Questions regarding incoming C.O.D. material should be directed to the Business Office, Ext. 3011.

Responsibilities of Requisitioner

The requesting department or authorized individual is required to inspect the contents of incoming freight/materials to ensure all items are:

1. In good condition.
2. Of the quality ordered (no substitutions).
3. In the quantity (quantities) requested.

Immediate inspection helps maintain warranty conditions and facilitates vendor responsibility for correcting deficiencies.

When merchandise does not meet with specifications, contact the Purchasing Department at once, ext. 2300; also see E5-140.0, this manual.

Small Order System (SOS) Receipts

Receiving documentation for SOS orders shall remain in the requisitioner's file. When Accounts Payable receives an invoice that matches a SOS Purchase Order, it is authorized to issue payment, unless requisitioner notifies Accounts Payable that there was a problem with the receipt. The requisitioner's account manager must reconcile their accounts monthly, thereby verifying that all charges against the budget are valid.

Alcohol, Tax Free

The University of Texas at Dallas is licensed by the Bureau of Alcohol, Tobacco and Firearms of the U.S. Department of the Treasury to obtain and distribute tax free 190 proof and 200 proof alcohol for research and educational purposes. The annual licensing period is May 1 through April 30.

Each January, the University forwards to the Department of the Treasury:
1. License renewal request signed by the Vice President for Administration.
2. Report of Tax Free Alcohol User signed by the Vice President for Administration.

The location and facilities provided for alcohol storage at UTD/Richardson and UTD/Callier Center on Inwood Road in Dallas are subject to:

1. Requirements of the U.S. Treasury Department.
2. Periodic inspection by representatives of the Treasury Department.

A. Requisitioning Procedure: Alcohol is issued only to those who have been approved by the appropriate Deans and the Vice President for Administration. Prior to September 1 of each year, a letter (see Exhibit F3) authorizing specific individuals to withdraw alcohol is submitted to the Receiving Department by the appropriate Deans. Requests are made on a Central Stores Requisition form (see Exhibit F6), complete with proper signature authority, and must include:
   1. Type and amount of alcohol required.
   2. Account to be charged.
B. Hours of Withdrawal: Alcohol is issued to authorized requisitioners between the hours of 8:00 a.m. and 4:30 p.m., Monday through Friday, at both UTD/Richardson campus and UTD/Callier Center.
C. Responsibilities of Receiving Department: The Receiving Department is responsible for:
   1. Maintaining the approved inventory level.
   2. Establishing and maintaining secure storage areas.
   3. Issuing requested quantities.

Each November, departments are canvassed to list their needs for the next licensing year; these requests are organized by Receiving personnel.

Explosives

A. General Policy: Central Receiving personnel at either the Richardson or Callier Center campuses will NOT open containers or inspect shipments marked "Explosives." The University Safety Manager or his/her designee is responsible for the acceptance and disposition of explosive and certain other hazardous material; e.g., phosphates.
B. Procedure:
   1. Follow the usual procedure for acceptance of freight/materials.
   2. Do not open any carton.
   3. Set the carton(s) aside in the specially designated area.
   4. Immediately contact the University Safety Manager, (ext. 2141), or his/her designee. At Callier Center, call ext. 3075.
   5. Wait for the University Safety Manager or his/her designee to open the container(s), if necessary, to inspect for visible or concealed damage.
   6. After the University Safety Manager or his/her designee releases the shipment to Receiving personnel, continue the usual receiving and delivery process on a priority basis.
Gases, Cylinder

A. A General Policy: The Receiving function stocks dry nitrogen in 280 cubic foot cylinders for use by authorized UTD personnel who present a Central Stores Requisition form (see Exhibit F4) with authorized signature. Receiving maintains its stock based on "usual quantity" requests. Notification of at least three (3) working days is required to procure enough gas for extraordinary situations. Receiving personnel record the amount of gas issued and charged to each authorized user on the Gas Cylinder Control form. UTD currently has a contract with BOC Gases to supply other gases (specialty gases) in cylinder form. These cylinders are delivered to Central Receiving and subsequently delivered by Central Receiving personnel to the proper department.

Note: Demurrage charges are made against the budget account of the using department. The monthly charge is based on $.16/day/cylinder.

B. Callier Center: At the present time, no gases are stocked at UTD/Callier. Should the need for these arise, Callier Receiving would draw their needs from the UTD stock and holding facilities.

C. Responsibilities of the Requisitioner: Authorized users are charged with the responsibility of:
   1. Securely fastening each cylinder against the laboratory wall
      a. For general safety purposes;
      b. To comply with Occupational Health and Safety Act (OSHA) standards for cylinder gas storage.
   2. Correctly estimating cylinder gas usage requirements.
   3. Returning "not needed" gas to Receiving as soon as it is determined that there is a surplus so as not to incur unnecessary demurrage charges.

Narcotics and Dangerous Drugs

A. General Policy: Narcotics and dangerous drugs are sometimes used in research and are strictly controlled by the University.

The function of Receiving personnel on the UTD Richardson and Callier Center campuses is to inspect for visible damage before delivery to the requisitioner. Receiving personnel are not to open material marked "Drug Control Program."

B. Procedure for Receiving Narcotics and Dangerous Drugs Used in Research:
   1. Inspect only for visible damage before removal from the delivering vehicle.
   2. Do not open any package or carton.
   3. Set the shipment aside in the specially designated area.
   4. Immediately contact the University Safety Manager or his/her designee and the University Police:

      Safety Manager
      UTD/Richardson 883-4111 Callier Center 3075
      Police
      883-2331 3020

   to inform them of the arrival of the shipment and the authorized requisitioner.
   5. Follow the usual procedure for acceptance of freight/material.
   6. Follow the usual delivery procedure on a priority basis.

C. Damaged Shipments (if a shipment exhibits visible damage):
   1. No not accept delivery.
   2. Do not remove the material from the delivery vehicle.
   3. Notify the University Police:

      UTD/Richardson Ext. 2331
      Callier Center Ext. 3020

      to receive instructions.
Nitrogen, Bulk

In addition to dry nitrogen, Receiving maintains a stock of liquid nitrogen which may be obtained by complying with the following procedure:

1. Submit a properly completed Central Stores Requisition form (see Exhibit F4).
2. Fill Dewars from the 2,000 gallon vessel located outside the west end of the Berkner Building in accordance with the following schedule:
   Monday-Friday 9:00 a.m. - 11:00 a.m.
   1:00 p.m. - 3:00 p.m.

Other Exceptions and Limitations:

1. Only Dewars of 25 liters or larger will be filled.
2. Dewars must have an approved safety cap.
3. Dewars must meet Occupational Safety and Health Act (OSHA) standards for storage and transportation of nitrogen and similar gases.

Radioactive Material

All radioactive material received by the University must be delivered to the UTD/Richardson Receiving Section, SB1.102, and handled as follows:

- Check for visible damage. If there is visible damage, do not remove container(s) from the delivery vehicle.

A. Procedure for Accepting Radioactive Materials Not Visibly Damaged:
   1. Follow the usual acceptance procedure.
   2. Do not open any containers.
   3. Place the material in plastic holding container(s).

Note: It is the responsibility of the requisitioner to immediately inform the University Radiation or Safety Officer of shipment arrival, ext. 2141.

For additional information, consult the UTD Safety Operating Manual, Section RS-1, Part F.

Policy History

- Issued: 1997-10-20

Policy Links

- Permalink for this policy: https://policy.utdallas.edu/utdbp3067
- Link to PDF version: https://policy.utdallas.edu/pdf/utdbp3067
- Link to printable version: https://policy.utdallas.edu/print/utdbp3067