

The County of San Bernardino Department of Behavioral Health

Furniture and Equipment Relocation Procedure

Effective Date 07/01/94
Revision Date 01/06/11


Allan Rawland, Director

Purpose To provide Department of Behavioral Health (DBH) staff with a protocol to efficiently and cost effectively relocate people, equipment and furniture.

Definition **Unit Relocation** entails moving six (6) or more people, including equipment and furniture, or moving an entire unit of any size.

Individual Relocation entails moving five (5) or less people, including equipment and furniture. Individual relocations should not represent an entire unit.

**Relocation
Preplanning**

DBH relocations will be preplanned. Preplanning will enable Facilities and Project Management (FPM) to observe ergonomic standards and ensure control/accountability for all aspects of the project. The Manager (Mgr) or Supervisor (Sup) will follow these steps for preplanning:

Step	Action
1	Begin preplanning at least two (2) months in advance, if possible.
2	Identify staff to be relocated: <ul style="list-style-type: none">• Number of staff• Staff names• Position name for each
3	Identify the type of equipment to be relocated, including: <ul style="list-style-type: none">• Copiers and identifying serial numbers• Facsimile machines and identifying serial numbers
4	Determine furniture needs as follows: <ul style="list-style-type: none">• New furniture purchases, if required and within appropriate budget allocations• Existing furniture planned to be used at the destination location
5	Determine what computer assets, if any, will need to be relocated, by locating the blue tag numbers attached on each item, as follows: <ul style="list-style-type: none">• Desktop/Laptop computers• Docking stations• Printers• Peripheral devices such as external hard drives, personal/unit scanners

Continued on next page

The County of San Bernardino Department of Behavioral Health

Furniture and Equipment Relocation Procedure, Continued

Relocation Procedure

The procedure below will be followed for all relocations. All actions need to begin two (2) months prior to the relocation for FPM activities. Computer equipment relocation is handled separately through DBH Information Technology (IT), and requires at least two (2) weeks' notice.

Step	Action
1	<p>Mgr or Sup will complete and submit to FPM, the following:</p> <ul style="list-style-type: none"> • For <i>Unit Relocations</i>: <ul style="list-style-type: none"> ○ Project Request Form, initially submitted electronically for initial FPM review, including: <ul style="list-style-type: none"> ▪ Reiterating preplanning specifics ▪ Identifying the program as Medi-Cal (M-C) or Alcohol and Other Drugs (AOD) certified ○ A signed hard copy of the Project Request Form sent, including appropriate PM approvals, via Interoffice Mail • For <i>Individual Relocations</i>: <ul style="list-style-type: none"> ○ Repair/Service Request Form, submitted electronically ○ A ticket number is automatically generated for project assignment and tracking <p>Note: The above linked forms are located on the DBH Intranet site under DBH Forms. Action on relocations is not taken until the signed and appropriately approved hard copy is received by FPM.</p>
2	<p>The Mgr or Sup will complete a Helpdesk Ticket <i>directly to DBH IT, not FPM</i>, to relocate computer assets identified in preplanning.</p>
3	<p>FPM Administrative Supervisor will assign a staff member to the approved project, who may:</p> <ul style="list-style-type: none"> • Contact the Mgr or Sup to obtain additional information to: <ul style="list-style-type: none"> ○ Complete cost estimates ○ Confirm the program as M-C or AOD certified ○ Determine the projected project timeline based on: <ul style="list-style-type: none"> ▪ Project scope ▪ Avoiding billing interruptions • Notify the Mgr or Sup when: <ul style="list-style-type: none"> ○ Cost estimates are completed by FPM <i>and</i> ○ Each time the request form is moved through the next stage of fiscal and executive review
4	<p>The assigned staff member will ensure new project requests are fully approved, including:</p> <ul style="list-style-type: none"> • Fiscal • Executive Management

Continued on next page

The County of San Bernardino Department of Behavioral Health

Furniture and Equipment Relocation Procedure, Continued

Relocation Procedure
(continued)

Step	Action
5	<p>The assigned staff member will coordinate any/all of the following:</p> <ul style="list-style-type: none"> ○ Contacting and coordinating activity with other DBH/County departments such as IT, Information Systems Department and County Facility Management ○ Serving as primary point of contact for planned telephone equipment/service relocations ○ Coordinating fax equipment relocation ○ Ensuring fire clearances are compliant with program certification requirements ○ Any vendor selection needed to prepare destination site for use ○ Vehicle relocations ○ Storekeeper assignments ○ Packing material delivery: <ul style="list-style-type: none"> ▪ Boxes ▪ Box labels ▪ Box sealing tape