

Distribution Services Handbook

Procedures and Guidelines



**UNIVERSITY OF
CALGARY**

Supply Chain Management
Physical Plant Building
2500 University Drive NW
Calgary, Alberta, CANADA
T2N 1N4

Please refer to <https://www.ucalgary.ca/finance/finance-forms> for a listing of our Handbooks.

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1 Contact Information

Supply Chain Management

Main Campus

Hours of Operation: Monday-Friday; 7:30 am - 4:00 pm
Physical Plant Building (West Campus)
3838 – 24th Ave NW

Foothills Campus

Hours of Operations: Monday-Friday; 8:00 am – 4:00 pm
Health Sciences Centre HSB-808
3330 Hospital Drive NW

Telephone: (403) 210-9300

Fax: (403) 282-8451

Email: finance@ucalgary.ca

Web: <https://www.ucalgary.ca/finance/about/our-team/supply-chain-management-team>

If there are any questions regarding the information stated in the handbook, please contact Supply Chain Management.

2 Distribution Services

Distribution Services provides centralized services to the campus community. That includes receiving goods from outside the campus, movement of goods on campus, and the disposal and/or outbound movement of goods.

Services include:

- Central Receiving
- Delivery to Campus, departments off campus and coordination with Alberta Health Services
- Shipping Services
- Postal Services
- Customs and Traffic
- Disposal and repurposing of surplus goods
- Inventory Management
- Furnishing industrial gases

2.1 Central Receiving

Distribution Services is responsible for Central Receiving. Ensuring centrally received Purchase Orders and Non-Purchase Order Shipments are received and reconciled in PeopleSoft and the University Package Tracking system daily.

2.1.1 Purchase Order Shipments

Inbound Purchase Order Shipments received centrally, will be checked for quantity, external condition and received in PeopleSoft on behalf of the end-user.

2.1.2 Direct Delivery Purchase Order Shipments

Inbound Purchase Order Shipments received by Faculties and Departments. Must be checked for quantity, condition and received in PeopleSoft in a timely manner.

2.1.3 Purchase Order Capital Equipment Shipments

Shipments will be received centrally and verified for condition. Distribution Services team will liaise with the end-user to coordinate receipt in PeopleSoft and establish and special handling requirements.

2.1.4 Purchase Order - Services

Requests for services ordered through Amount Only purchase orders. Should be reviewed regularly by Faculties and Departments to confirm completion of work and received in PeopleSoft to initiate payment.

2.1.5 Oversized Purchase Order Shipments

Coordination with Procurement and Distribution Services is required to ensure logistical issues for receipt and delivery are addressed before the purchase order is processed.

2.1.6 Personal Items/Shipments

Central Receiving is not responsible for loss or damage to personal mail or packages addressed and delivered to the University. All packages received are subject to inspection and personal items may be opened. Personal items are not to be directed through Distribution Services and may be returned to sender at the cost of the recipient.

2.2 Delivery

Received shipments from couriers are processed upon arrival. Depending on sensitivity, volumes and department requirements shipments will be delivered within two business days of receipt via super mailboxes, building or office/lab delivery.

2.2.1 Priority Shipments (Perishable/Time Sensitive and Business Courier Documents)

Priority delivery will be given to these shipments and will be delivered the same day. If a shipment cannot be delivered, it will be returned to Distribution Services and stored accordingly. (I.e fridge, freezer, or room temperature) until delivery/pick up is coordinated. If you require a status update on your time sensitive shipment, please contact UService through finance@ucalgary.ca or (403) 210-9300 ensuring you have a carrier tracking number, PO number and supplier name.

2.2.2 Delivery requirements

If alternate arrangements have been made with a supplier for a product delivery directly to a lab or office due to size, volume or shipment specifications. Please ensure the courier is advised of the alternate delivery location and available delivery times. As these shipments bypass Distribution Services, you will be required to receive them in Peoplesoft.

For Foothills campus deliveries the loading dock has a height restriction of 13 feet, and can accommodate up to a 5 ton truck.

2.2.3 Damage Claims

Distribution Services will check all shipments for external damage and make note of the damage on the carrier waybill and the delivery transaction. Recipients have 24 hours to check the shipment for any internal damage and follow-up with the supplier directly.

2.3 Shipping Services

2.3.1 Outbound shipments

Shipments from Faculties and Departments routed through SCM Distribution Services requires an Off Campus Shipping Form to be completed prior to the shipment being picked up.

The Office Campus Shipping Request form can be found at > My work > Finance & Supply Chain > SCM service request.

To ensure your shipment is handled in a timely manner the following information is required:

- Consignor Name and Faculty/Department
- Consignee Name, Address, Phone Number
- Full description and value of shipment
- Special Handling information i.e., Refrigeration Required and or Keep at Room Temperature
- Indicate if the shipment is to be sent prepaid or collect
- Collect shipments require the name of the consignee's courier company and courier account number
- Include your courier account number and if applicable original purchase order number
- If your shipment contains Hazardous Goods you must ensure the Dangerous Goods Declaration on the Off Campus Shipping Form is signed acknowledging Dangerous Goods.
- If "Payment Method" is selected by Department, ensure the Fund, Department ID and if applicable Project number is provided

Low dollar freight and courier costs for operating budgets are centrally funded, with the exception of cost recovery shipments. Any single line charge over \$500.00 will be billed back to the initiator's funding.

Research, FHOB and Arctic funded accounts will have all freight and courier service charges billed directly to the project accounts provided.

Reference materials, examinations, grant applications etc. must be declared as such. Printed materials are \$5.00 per pound, this is acceptable with foreign customs agents. Indicating "no commercial value" (NCV) or "no value declared" (NVD) is not acceptable.

2.3.2 Hazardous/Biological/Perishable

Distribution Services requires 24 hours notification prior to shipping date for document processing. Please attach Material Safety Data Sheet (MSDS) form to shipment available from the manufacturer to be completed by the researcher of lab staff directly responsible for the usage or packaging of the shipment.

Hazardous/Biological/Perishable Shipments require the following information:

- Chemical/ sample name
- Quantity and/or volume
- Quantity of Dry-Ice if applicable

The following dry-ice packaging quantities should be considered:

- Major cities in North America – minimum 5kg Dry-Ice
- Rural Areas – minimum 10kg Dry-Ice
- Overseas Shipments – minimum 20kg Dry-Ice

2.3.3 Out of Country Equipment Repairs for Canadian Goods

Equipment sent out of the country for repair or calibration must have the following information:

- Serial number and model number
- University of Calgary tag number
- FCC identifier number (for electronics)
- Country of origin
- Consignee's Tax Identifier number (IRS number)
- Returned goods authorization (RGA or RMA) number
- Value of the goods

This information is a requirement of both Canada and US Customs to identify the goods as being sent for repair.

2.3.4 Out of Country Equipment Repairs for foreign Made Goods

- Serial number and model number
- University of Calgary tag number
- FCC identifier number (for electronics)
- Country of origin
- Consignee's Tax Identifier number (IRS number)
- Returned goods authorization (RGA or RMA) number
- Value of the goods
- Completion of a [USGR](#), declaration of foreign goods returned

This information is a requirement of both Canada and US Customs to identify the goods as being sent for repair.

2.4 Postal Services

Postal Services provides pickup, sorting and distribution to main, foothills and off campus departments including coordination with Alberta Health Services.

- University Research Centre
- ERRB
- Olympic Volunteer Centre
- Downtown campus
- SMART Technologies Building
- High Density Library
- Spy Hill

2.4.1 Incoming Mail

Inbound mail from Canada Post is received daily, sorted by Faculty, Department and Unit then delivered depending on operational capacity and priority. To ensure timely mail delivery please inform all correspondents that all incoming mail must be addressed with your name and department. Any unknown mail will be returned to sender.

Main Campus

ADDRESSEE'S NAME
DEPARTMENT NAME
BUILDING NAME AND ROOM NUMBER
UNIVERSITY OF CALGARY
2500 UNIVERSITY DRIVE N.W.
CALGARY, AB T2N 1N4

Foothills Campus

ADDRESSEE'S NAME
DEPARTMENT NAME
BUILDING NAME AND ROOM NUMBER
UNIVERSITY OF CALGARY
3330 HOSPITAL DRIVE NW.
CALGARY, AB T2N 4N1

2.4.2 Business Reply Service

For large research studies or questionnaires that requires participants to reply via Canada Post. Distribution Services provides an option to use Canada Post's Business Reply Mail service via the University that is cost efficient and centralized. For more information contact distributionservices@ucalgary.ca.

2.4.3 Outbound Mail

Outbound mail is collected from Faculties and Departments daily. Mail should be sorted in two separate bundles (CDN & US, International). Ensure all mailings include a valid chartfield string to expediate processing.

Outbound mail at Foothills Campus should be brought down to the HSC Mailroom (HS-B808) and sorted into corresponding bins.

All mailing costs for Research, FHOB0 and Arctic funded accounts will be billed directly to the project accounts provided.

2.4.4 Personal Mail

Personal mail may not be directed through Distribution Services and will be returned to sender.

3 Customs and Traffic

The Customs and Traffic team provides knowledge, guidance and support to the campus regarding Canadian Customs requirements for clearance and import permits for cross-border shipments. This includes:

- Exporting from Canada
- Clearance of goods into Canada
- Obtaining required permits
- Information for suppliers and shippers
- Shipping CDN and Foreign made goods for repairs

3.1 Customs

All goods purchased for the University, no matter the dollar value, from outside of Canada. Must be reported to the Canada Border Services Agency (CBSA) and cleared through a Customs Broker. For the University, the courier determines the broker to be used.

Low dollar freight and courier costs for operating budgets are centrally funded, with the exception of cost recovery shipments. Any single line charge over \$500.00 will be billed back to the initiator's funding.

Research, FHOB and Arctic funded accounts will have all freight and courier service charges billed directly to the project accounts provided.

3.1.1 Customs Broker

The University of Calgary utilizes multiple couriers to support operational/research activities. Therefore, uses the services of several brokers.

The University of Calgary is the broker for:

- FedEx Express (air)
- DHL
- UPS
- Air Canada

Thompson Ahern Int'l is the primary broker for all other couriers including Fed Ex Freight (ground) for importing.

Livingston is the primary broker for all other couriers exporting,

For more information contact customstraffic@ucalgary.ca.

3.1.2 Clearance Requirements

For importing and exporting the following documentation and information is required to avoid delays in processing:

- Commercial Invoice addressed to the University
 - Purchaser of the goods - name and address of recipient at the U of C
 - Supplier name and address
 - Detailed product description including model, serial, or catalog number
 - Quantity of commodity
 - Value of commodity – broken out if more than one commodity on order
 - Country of origin (where the commodity was produced/manufactured)
 - Currency used for shipment
 - Purchase Order (PO) number - *only required for importing*
 - Name of broker – *only required for importing*

To facilitate off campus shipping, go to the U of C portal and under My Work click on [SCM service request forms](#).

3.1.3 Permits

Permits for imported or exported goods are required by the Canadian government to control certain commodities that cross our borders to ensure the safety of the environment and public health. The issuance of permits most occur prior to the commodity crossing the Canadian border to mitigate risk of refused entry or penalties.

These commodities include but are not limited to:

- Biological Shipments
- Hazardous Products
- Controlled Products

We strongly recommend you contact the Customs and Traffic team at customstraffic@ucalgary.ca prior to having these types of products shipped to Canada to ensure compliance with regulations.

The following links provide more information on Import Permits.

- Public Health Agency of Canada - <http://www.phac-aspc.gc.ca/ols-bsl/index.html>
- Canadian Food Inspection Agency (CFIA) - <http://www.inspection.gc.ca/english/toce.shtml>

3.1.4 Personal Shipments

Shipments procured using a personal credit card, or gifts of a personal nature, are not considered University business and may be returned to the sender at the cost of the purchaser.

The responsibility for the Customs formalities will rest with the purchaser and incurred charges (GST, duty, and brokerage) will be the responsibility of the employee's department. Personal shipments are not to be consigned to individuals in care of their work address at the University of Calgary as this creates confusion regarding the true Importer of Record and can create liability to the University.

4 Disposal and Surplus

4.1 Repurposing

Distribution Services provides used surplus goods to the University campus. To support the University's initiatives on sustainability as well as reduce the impact on our environment.

4.1.1 Surplus Requests

Distribution Services maintains a limited inventory for re-distribution on campus. Two options are currently available:

- Remotely - Faculties and or Departments can complete an on-line "Surplus Request" Form. The request form is located on the [My U of C Portal](#) > My work > Finance & Supply Chain > SCM service request forms. Once the request is received you will be contacted and provided options that are available, including pictures if applicable.
- In person - Viewing of available furniture, desks, chairs, etc. can be done on the first and third Thursdays of the month from 1:00 -2:30 p.m. at the General Services Building (GSB) located at 3876 – 24 Avenue NW.

Repurposed Inventory usually includes but not limited to:

- White Boards/Bulletin Boards
- Bookcases
- Chairs
- Desks (office and student)
- Filing cabinets
- Tables
- Wall dividers

For more information send an email to distributionservices@ucalgary.ca.

4.2 Disposals

Distribution Services is responsible for the removal and processing of all equipment, furniture, computers, miscellaneous items on campus. All items for disposal are to be declared through the forms located on the U of C portal under My Work > Finance & Supply Chain > SCM service request forms > Equipment Disposal or Surplus Request (furniture) form.

Ensuring all disposals for the campus are processed centrally aligns with the University's focus on sustainability as received items will be repurposed, recycled, or donated and minimizes risks with hazardous goods.

4.2.1 Surplus Disposal

Distribution Services provide removal support of used inventory to faculties and departments.

All requests are to be submitted through the “Surplus Request” form found on the U of C portal under My Work>Finance & Supply Chain>SCM service request forms > Surplus Request.

Once submitted and approved by the appropriate Department Heads, Deans or designates, the disposal team will arrange for pick-up within 10 business days.

Disposal requirements

- No more than 10 items per disposal request submitted through SCM service forms
- No than 50 lbs. per item
- Must have easy access for Distribution Services to pick-up
- Be packaged and ready for pick-up
- Sizing – one person should be able to pick up or move
- Completed paperwork to be affixed to disposal item

Disposals that exceed the above limits will be assessed based on operational capacity and may be referred to a University of Calgary [preferred moving supplier](#). The cost for this service is the responsibility of the Faculty or Department.

Note: File Cabinets, Storage Cabinets and desks must be emptied prior to removal. Accurate description and quantity of furniture is essential to ensure adequate resources are allocated to the request.

4.2.2 Equipment Disposal

All University of Calgary equipment purchased with university funds (Operating, Capital or Research) declared surplus by faculties and departments will not leave the campus without prior Supply Chain, Department Heads, Deans or designates approval.

Disposing of University of Calgary equipment by any method other than the Equipment Disposal Requisition Form is not permitted.

4.2.3 Equipment Disposal Form Requirements

4.2.3.1 *Equipment Disposal Form*

Faculties and/or Departments are required to complete an “Equipment Disposal” Request. The request form is located on the [My U of C Portal](#) > My work > Finance & Supply Chain > SCM service request forms > Equipment Disposal.

Complete the “Equipment Disposal” Form in detail ensuring you provide the e-mail of an approver, which MUST be a Department Head, Dean or designate. Distribution Services cannot process your request until the approval process is complete.

4.2.3.2 *Hazardous Materials Clearance Form*

If your asset contains hazardous materials, has been in a lab environment or has been exposed to potential chemical and or radioactive contamination, you must follow proper equipment decommissioning instructions before the asset is offered for disposal. Before disposal, the initiator must read and comply with the [Contaminated Equipment and Equipment Containing Hazardous Materials Procedures](#). As well submit the Hazardous Material Clearance Form. The form is available through a link on the Equipment Disposal Request form found on the [SCM Service Request Forms](#).

4.2.4 **Equipment Disposal Categories**

4.2.4.1 *Operating Fund Purchase*

Equipment purchased with Operating funds remains the property of the University of Calgary and must be disposed of through the Equipment Disposal form.

4.2.4.2 *Research (Non Tri-Council) Purchase*

Equipment purchased with Research Funds other than Tri-Council Funds must have the terms and conditions of the trust agencies checked by Research and Trust Accounting to determine if the goods can be legally released from the University.

4.2.4.3 *Research (Tri-Council) Purchase*

Requests by staff to retain equipment purchased with Tri-Council Funds will be handled on a case-by-case basis and governed by appropriate University and Granting Agencies Policies and Procedures.

4.2.4.4 *Professional Expense Reimbursement (PER) Purchase*

As a Non-taxable Benefit, items with a useful life of more than a year will remain the property of the University.

When a staff member retires or leaves their employment with the University, they must ensure these items are returned to their department or faculty. **These assets cannot be gifted to the employee.**

4.2.4.5 *University Funded – External Research*

All equipment will be returned to the University of Calgary at the end of approved off-site activities.

Retention of equipment for purposes of continued University related research work at an off-site location will require the following:

- The written approval of Department Head, Dean or designate
- Completion of an Authorization for off Campus Use of Equipment Form

- Asset Management module in PeopleSoft to be updated by the faculty/department

4.2.5 Transfer of Equipment

If a staff member/grantee is moving to another Canadian institution and wishes to move equipment purchased with grant funds, permission for such a move must be obtained from the University and the Grantor. In the event that equipment or facilities are transferred or loaned by the University of Calgary, the following arrangements may apply:

- The University of Calgary retains ownership of the equipment but may reach an agreement to relocate them. There should be a letter of agreement from the University that confirms
 - ownership of the equipment
 - the associated custodial responsibilities
 - how it will be used
 - and what access researchers from each institution will have

The University of Calgary may transfer ownership of the equipment to a Secondary Institution through a gift or sale. A written agreement detailing transfer rights and responsibilities of both parties should be in place before the transfer takes place. All applicable University and Granting Agency Policies and Procedures will be considered before transfer is approved.

4.2.6 Disposal Fund Recovery

If a single item designated for disposal sells for over \$2000.00, the funds will be allocated back to the department. You will be contacted by Distribution Services requesting an accounting string where you would like funds to be deposited into.