

**PERSONAL PROPERTY RECORD**  
**Clothing & Non-Clothing Items \$50 or Greater**

**NAME:** \_\_\_\_\_

**RESIDENCE:** \_\_\_\_\_

**INDIVIDUAL ID#:** \_\_\_\_\_

**FREQUENCY OF INVENTORY:** \_\_\_\_\_  
(Monthly, Quarterly, etc.)

**SSN:** \_\_\_\_\_

<b>Item Description</b>	<b>Date of Purchase</b>	<b>Cost of Item</b>	<b>Balance Brought Forward</b>							<b>Balance on Hand</b>

(SEE PAGE 2 FOR INSTRUCTIONS)

## INSTRUCTIONS FOR USE OF “PERSONAL PROPERTY RECORD”

1. Quarterly (or more frequently as determined by the habilitation team) an inventory or actual count of all personal property items will be accomplished.
2. The date of the inventory and the initials of the staff member conducting the inventory will be entered in the specified columns used for each inventory.
3. All entries require the date and initials of the staff member who conducts the inventory.
4. This form will be retained for one (1) year in the “Personal Needs” section of each individual’s chart. Forms removed from the individual’s personal folder will be retained within the residence for an additional two (2) years. After two (2) years, the forms will be retained with the Regional Center Business Office and subsequently disposed of in accordance with DDSN records retention policy.
5. New purchases will be logged on the “Personal Property Record” immediately after purchase(s) have been made.
6. When an item of personal property is deleted due to normal wear and tear, loss, etc., the date item(s) are deleted and the initials of the staff member taking the deletion action will be entered in the specified columns at the time of the personal property item(s) are deleted.
7. Single (one each) personal property items with a purchase cost of \$49.99 or less will not be listed on the individual’s personal property record, unless otherwise recommended.
8. The serial numbers of items such as television sets, bicycles, stereo units, etc. will be listed either on the same line with the item or on the line immediately below the listed item.

The dollar value of high cost items such as jewelry will be noted along with the item description. Dollar value may be determined from purchase receipts or professional estimates if necessary.

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 (Monthly, Quarterly, etc.)

**SSN:** \_\_\_\_\_

Item Description	Date of Purchase	Cost of Item	Balance Brought Forward	Add MRK 1/2/96	Qtr Inv MRK 1/4/96	Qtr Inv MRK 4/3/96	Deletion MRK 5/3/96	Add MRK 5/30/96	Qtr Inv MRK 7/1/96	Balance on Hand
Motorized Wheelchair Ser # RX345S3RM4	3/9/94	\$2,567	1		1	1			1	1
Sony Portable Tape Player, Ser # 3456754	1/2/95	\$115	1		1	1			1	1
Harley 2 Wheel Bicycle - Red, Ser #M37RSTR4	3/10/95	\$115	1		1	1			1	1
XL100 25" RCA Color TV, Ser # 0027R356A	1/2/96	\$555	0	1	1	1			1	1
Panasonic Portable CD Player, Ser #127345	1/2/96	\$129	0	1	1	1	(1) Broken, cannot repair			0
Reebok Jump High Tennis Shoes (black & white)	5/30/96	\$87	0					1	1	1
Black 3 Piece Sears Suit	5/30/96	\$159	0					1	1	1