



Going, going, gone!

Capital and Non-Capital Equipment Disposal  
Presenter: Debra Ellison, Property Management

# AGENDA

- **Definitions**
- **Policies and Procedures**
- **Disposal Request Documents (Transferring vs Retiring)**
  - Electronic Equipment Authorization Change Request (EACR)
  - Asset Edit Document
  - Asset Retirement Global Document
- **Assets Physically Transferred to Surplus Property**
- **Asset Edit Document (Transferring)**
  - Sold
  - Cannibalized
  - Equipment Release
  - Destroyed
  - Software Termination
- **Asset Retirement Global Document (Retiring)**
  - External Transfers
  - Trade-Ins
  - Write-Offs (Lost/Improper Disposal)
  - Theft
- **Necessary Requirements**
- **Obtaining Requirements**
  - External Transfer Form
  - CSU Equipment Release Request
- **Submitting the Asset Edit Document**
- **Submitting the Asset Retirement Global Document**
- **Unauthorized Disposal Form**
- **Questions**

# DEFINITIONS

**Cannibalization:**

To remove serviceable parts from an asset for repairing or replacing other equipment of the same kind. This is an alternative to using or purchasing new parts.

**Destroyed:**

Equipment that is damaged beyond repair.

**Discount:**

A deduction from the usual cost of something, typically given for prompt or advance payment or to a special category of buyers (i.e. educational discount).

**Donation:**

Gifting equipment without monetary compensation.

**External Transfer:**

The transfer of equipment to another institution or non-profit agency.

**Improper Disposal:**

Relinquishing assets without following state and university policies and procedures.

**Lost:**

Unable to locate.

# DEFINITIONS

## **Non-Monetary Equipment Exchange:**

A reciprocal transfer between an enterprise and another entity that results in the enterprises acquiring assets or services or satisfying liabilities by surrendering other assets or services or incurring other obligations. This can also be a warranty exchange.

## **Sold:**

To transfer goods to or render services for another in exchange for money.

## **Theft:**

Wrongful taking and carrying away of the personal goods or property of another.

## **Trade-In:**

Something given up in return for a trade-in allowance.

## **Trade-In Allowance:**

A reduction to the total cost of a vendor's invoice.

## **Unauthorized Disposal:**

Disposal of equipment without obtaining proper authorizations.

## **Vendor Removal:**

Equipment released to a vendor without compensation. The vendor may or may not charge a fee for the removal.

## **Write-Off:**

To eliminate (an asset) from the books. To regard or concede to be lost or disposed of improperly.

# POLICIES AND PROCEDURES

CSU is responsible for tracking assets from acquisition to disposal.

Prompt reporting and removal of any unneeded assets is desirable and necessary in order to maintain an accurate inventory of usable items, to reduce storage of unusable items, and/or to permit sale or reutilization of assets.

Verification of the current utilization and continued need for equipment should be done, at minimum, during the department's inventory cycle.

# POLICIES AND PROCEDURES

State and university policies and regulations, a property.

In order to protect Surplus Property from disposal methods and buildings, and

When a department appropriate documentation must be obtained.



as environmental rules  
university acquired

om any violations;  
ng the appropriate  
erty, other than land  
uch disposal.

n asset, the  
ecessary requirements

***NO EQUIPMENT SHOULD BE DISCARDED BY THROWING IT IN THE TRASH***

# DISPOSAL REQUEST DOCUMENTS (TRANSFERRING VS RETIRING)

## TRANSFERRING ASSETS

### ELECTRONIC EQUIPMENT AUTHORIZATION CHANGE REQUEST (EACR)

Used to transfer all non-capital or retired Kuali assets to Surplus Property.

A CSU Employee ID is needed in order to submit an Electronic EACR.

### ASSET EDIT DOCUMENT

Used to transfer all active Kuali assets to Surplus Property. It is also used for department to department transfers of active Kuali assets. This document will not retire the asset from the university's financial records. It will, however, move it from the transferring department's inventory record to the receiving department's inventory record.

## RETIRING ASSETS

### ASSET GLOBAL RETIREMENT DOCUMENT

Used to retire active Kuali assets. Retiring an asset will remove the asset from the university's financial records and the department's inventory record.

A CAM Processor Role is needed in order to submit Kuali documents.

***Departments will need to obtain all necessary requirements prior to submitting any document request for disposal of an asset.***

# ASSETS PHYSICALLY TRANSFERRED TO SURPLUS PROPERTY

If a department is wanting to surplus an asset, they need to submit either an Electronic EACR or an Asset Edit document in order to transfer the asset to Surplus Property. Once Surplus received the document, they will schedule a time to pick up the asset from the department.

If a department wants to drop off the equipment to Surplus Property directly, they still need to submit the appropriate document. However, they will need to let Surplus Property know using the notes section of the asset edit document or by marking the Direct Drop box on the EACR that a pick up is not needed.

When items are physically transferred to Surplus Property, the item will either be transferred/sold to another department that may be able to reutilize the item or retired by Surplus Property according to state and university policies and procedures.



# ASSET EDIT DOCUMENT (TRANSFERRING)

The Asset Edit Property.

Depending on appropriate Property's information.

The following



even when the asset may not be physically transferred to Surplus

even though the asset may not be physically transferred to surplus, the document may still need to be submitted to transfer the asset to Surplus if retired.

transferring the asset to Surplus

- **Sold:** Departments and individuals are required to document the transfer by making, negotiating, or authorizing the transfer to a non-university or university agency (including department).

WHAT DO YOU MEAN



- **Cannibalized:** Departments should request verification before releasing any property to a non-university agency.



- **Asset:** Departments and individuals are required to document the transfer by making, negotiating, or authorizing the transfer to a non-university or university agency (including department).



Departments should promptly report covered losses to Risk Management and Property Management acknowledges that some items may need to be disposed of. To minimize risk of improper disposal, do not throw the item directly into a trash bin or Environmental Health Services (if warranted) immediately following the loss. If the damaged item does not require immediate disposal, contact the appropriate agency. The time of the loss to request verification of the destroyed capital asset. Department documents listing items damaged that may also serve as verification of a loss.

DUCT TAPE WON'T FIX IT?

university agency (including department).

need to be submitted to transfer the asset to Surplus if retired. even though the asset may not be physically transferred to surplus, the document may still need to be submitted to transfer the asset to Surplus if retired.

- **Software Termination:** Department should request verification before deleting any capital software.

Note: When necessary, Property Management may submit an Asset Retirement Global document on behalf of the department, once necessary requirements have been provided.



# ASSET RETIREMENT GLOBAL DOCUMENT (RETIRING)

Departments may retire capital assets by submitting an Asset Retirement Global document, along with all necessary required documents, for the following retirement reasons only:

- *External Transfers*
- *Trade-Ins*
- *Write-Off (Lost/Improper D*
- *Theft*



# NECESSARY REQUIREMENTS

**Before an asset may be relinquished or retired, some form of authorization, verification, and/or documentation needs to be obtained. This is especially important when assets are not physically transferred to Surplus Property for disposal.**

**Authorizations:** Authorizations are usually obtained by some form of physical documentation or through the routing of Quali documents.

**Verifications:** Verifications may be done by either *Surplus Property personnel* or *Property Management personnel*.

**Documents:** Depending upon multiple factors, the type of documents necessary will vary per request.

# OBTAINING REQUIREMENTS

For external transfers, trade-ins, vendor removals and non-monetary exchanges, there are two Prior Authorization Request forms available.

- *The External Transfer Form* (for external transfers)
- *The CSU Equipment Release Request Form* (for trade-ins, vendor removals, or non-monetary exchanges)

*There are sections provided on each of the prior authorization request forms that a department may use to obtain necessary requirements.*



**EQUIPMENT EXTERNAL TRANSFER FORM**

**ALL EXTERNAL TRANSFERS REQUIRE THE FOLLOWING:** 1) A *Letter of Release* (signed by the CSU Department Head/Dean; 2) A *Letter of Acceptance* (signed by the Agency receiving the equipment); and 3) A *List of the Equipment* being transferred. The Office of Sponsored Programs may require additional documents when transferring Sponsor/Federal funded equipment. Please submit this form to PROPERTY MANAGEMENT for assistance with all External Transfers.

Department Transferring Equipment: \_\_\_\_\_ Date: \_\_\_\_\_  
Department Contact Person: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**CSU LETTER OF RELEASE**

Department Head/Dean signature (Required\*): \_\_\_\_\_ Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

**\*Use attached Letter of Release or Formal Documents.**

Receiving Vendor/Institution/Agency: \_\_\_\_\_ Contact Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_



This request is for (select ALL that apply):

**EXTERNAL TRANSFER *LOANED* EQUIPMENT (DECAL DOES NOT START WITH 3):** OSP authorization is required for all Sponsor/Federal funded equipment transfers. Additional documents may also be required.

REASON FOR TRANSFER:  Returning Loaned Equipment  Other: \_\_\_\_\_

**EXTERNAL TRANSFER *CSU TITLED* EQUIPMENT (DECAL DOES NOT START WITH 5 OR 6 OR THE ASSET DOES NOT HAVE A DECAL):** Restrictions apply to CSU titled equipment being released without monetary compensation. OSP authorization is required for all Sponsor/Federal funded equipment transfers. Additional documents may also be required. Surplus Property authorization is required prior to transferring and/or negotiating any sale of CSU titled equipment.

Is any equipment transferring 53 fund related?  YES (53 FUND \_\_\_\_\_)  NO  UNKNOWN

REASON FOR TRANSFER:  PI Transferring to another Institution  Other: \_\_\_\_\_

THIS SECTION IS FOR SURPLUS PROPERTY USE ONLY (required for all *CSU titled* equipment transfers)

PROPRIETARY INFO  RFLE/EHS  OTHER AUTHORITY: \_\_\_\_\_ SALE NEGOTIATED:  YES  NO

OK to Release  Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

**EXTERNAL TRANSFER *SPONSOR/FEDERAL TITLED* EQUIPMENT (THIS OPTION IS ONLY FOR ASSETS THAT HAVE DECALS STARTING WITH 5 OR 6):** OSP authorization is required for all Sponsor/Federal funded equipment transfers. Additional documents may also be required.

REASON FOR TRANSFER:  PI Transferring to another Institution  53 Closed (53 FUND \_\_\_\_\_) transferring equipment back to Sponsor/Federal Agency  Other: \_\_\_\_\_

NOTE: If moving equipment to another project, contact OSP and Property Management.

PLEASE SUBMIT THIS REQUEST AND ALL REQUIRED DOCUMENTS TO PROPERTY MANAGEMENT 6003 CAMPUS DELIVERY OR

[DEBRA.ELLISON@COLOSTATE.EDU](mailto:DEBRA.ELLISON@COLOSTATE.EDU).

**SUPPLEMENTAL PAGE**

**LIST OF EQUIPMENT**

**USE THIS SECTION FOR ACTIVE ASSETS IN KUALI:**

DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_  
DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_

**USE THIS SECTION FOR RETIRED ASSETS IN KUALI:**

RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_  
RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_

**USE THIS SECTION FOR NON-CAPITAL EQUIPMENT OR INACTIVE DECAL NUMBERS NOT FOUND IN KUALI:**

ASSET DESCRIPTION                      MANUFACTURER                      MODEL                      SERIAL NUMBER                      ADDITIONAL INFO (DECAL # NOT IN KUALI, ETC.)

<u>ASSET DESCRIPTION</u>	<u>MANUFACTURER</u>	<u>MODEL</u>	<u>SERIAL NUMBER</u>	<u>ADDITIONAL INFO (DECAL # NOT IN KUALI, ETC.)</u>

Use attached List of Equipment or Formal Documents, instead.



**AGENCY LETTER OF ACCEPTANCE**

ACCEPTING AGENCY: \_\_\_\_\_

ACCEPTING AGENCY CONTACT NAME: \_\_\_\_\_ PHONE #: \_\_\_\_\_

***I AUTHORIZE ACCEPTANCE OF THE EQUIPMENT LISTED:***

AUTHORIZED SIGNATURE OF ACCEPTING AGENCY (Required\*): \_\_\_\_\_ PRINTED NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

**\*Use attached Letter of Acceptance or Formal Documents.**

**FOR DEPARTMENT**

**Upon proper authorizations, attach this form and any additional documents to the necessary Kualii documents to be submitted.**

**CSU TITLED EQUIPMENT: If a sale has been negotiated, an Asset Edit document (for all Active Kualii assets) or an Electronic EACR (for assets not in Kualii) will need to be submitted with proper documents, transferring the equipment to Surplus. Departments are not authorized to retire assets as sold or sell assets directly to any entity. Otherwise, submit an Asset Retirement Global document; reason: External Transfer. If equipment is 53 fund related, OSP will need to be included in the routing as an approver.**

**VENDOR/SPONSOR/FEDERAL TITLED AND/OR LOANED EQUIPMENT: An Asset Retirement Global document; reason: External Transfer, will need to be submitted. If equipment is 53 fund related, OSP will need to be included in the routing as an approver.**



THIS SECTION IS FOR PROPERTY MANAGEMENT USE ONLY

\_\_\_OSP \_\_\_CSURF \_\_\_21 FUND \_\_\_OTHER AUTHORITY: \_\_\_\_\_

\_\_\_ OK to Release \_\_\_Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

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THIS SECTION IS FOR SELECTED AUTHORITY USE ONLY (if required) Authority: \_\_\_EHS \_\_\_OSP \_\_\_CSURF \_\_\_21 FUND \_\_\_OTHER\_\_\_\_\_

\_\_\_ Ok to Release \_\_\_Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

# CSU EQUIPMENT RELEASE REQUEST

## CSU EQUIPMENT RELEASE REQUEST

To protect the University from releasing equipment that may contain contaminants, proprietary information, or other restrictions, please submit this request before relinquishing any equipment.

Please provide the following information:

Requesting Department: \_\_\_\_\_ Date: \_\_\_\_\_

Department Contact Person: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Department Head/Dean Signature (Required): \_\_\_\_\_ Printed Name: \_\_\_\_\_

This request is for:

- TRADE-IN:** To be considered a trade-in, CSU must relinquish something in return for a trade-in allowance. NOTE: A quote from the vendor showing the trade-in allowance is required. Check box if this is going Out-to-Bid and no quote is available
- VENDOR REMOVAL:** A vendor may offer to remove equipment with/without charge or offer a discount rather than a trade-in allowance. Restrictions apply to CSU equipment being released without monetary compensation. NOTE: If there is a charge or discount, a quote showing the charge or discount is required.
- EQUIPMENT EXCHANGE:** A non-monetary exchange or a warranty replacement. Restrictions apply.

Comments:

\_\_\_\_\_

SUBMIT THIS REQUEST (INCLUDING THE SUPPLEMENTAL PAGE AND ANY OTHER REQUIRED DOCUMENTS) TO: PROPERTY MANAGEMENT  
6003 CAMPUS DELIVERY OR EMAIL TO: [DEBRA.ELLISON@COLOSTATE.EDU](mailto:DEBRA.ELLISON@COLOSTATE.EDU)

### THIS SECTION IS FOR PROPERTY MANAGEMENT USE

\_\_\_OSP \_\_\_CSURF \_\_\_21 FUND \_\_\_OTHER AUTHORITY: \_\_\_\_\_

\_\_\_OK to Release \_\_\_Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

THIS SECTION IS FOR SELECTED AUTHORITY USE ONLY (if required). Authority: \_\_\_EHS \_\_\_OSP \_\_\_CSURF \_\_\_21 FUND  
\_\_\_OTHER \_\_\_\_\_

\_\_\_OK to Release \_\_\_Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

### THIS SECTION IS FOR SURPLUS PROPERTY USE

\_\_\_PROPRIETARY INFO \_\_\_RFL/EHS \_\_\_OTHER AUTHORITY: \_\_\_\_\_

\_\_\_OK to Release \_\_\_Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

For Department: \_\_\_\_\_

Once this document has been returned with all necessary signatures, please attach this form, the supplemental page, and any other required documents to your Kualii Document(s).

## SUPPLEMENTAL PAGE (Required)

### USE BELOW SECTION TO LIST EQUIPMENT TO BE RELEASED BY TRADE-IN, VENDOR REMOVAL, OR EXCHANGE

USE THIS SECTION FOR ACTIVE ASSETS IN KUALII (an Asset Retirement Global Document will be required to retire active Kualii assets):

DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_

DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_

USE THIS SECTION FOR RETIRED ASSETS IN KUALII:

RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_

RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_

USE THIS SECTION FOR INACTIVE DECAL NUMBERS (list in other info), NON-CAPITAL EQUIPMENT OR ANY EQUIPMENT THAT IS NOT FOUND IN KUALII:

ASSET DESCRIPTION	YR BUILT	MANUFACTURER	MODEL	SERIAL #	ACQ COST/FMV*	OTHER INFO

\*The Acquisition Cost is the amount paid for the item new. The Fair Market Value is price that the item would sell for at present. Please designate which value you are submitting by putting the value on the left (Acq Cost) and/or right (FMV) side of the "/" mark in the Acq Cost/FMV box. Leave either side or both sides blank if unknown.

FOR TRADE-IN'S, SUBMIT THE QUOTE SHOWING THE TRADE-IN ALLOWANCE FOR THE ABOVE LISTED EQUIPMENT.

FOR VENDOR REMOVAL, SELECT ONE:  NO CHARGE  CHARGE \$ \_\_\_\_\_ /DISCOUNT \$ \_\_\_\_\_ (submit the quote showing charge or discount amount).

### BELOW SECTION IS FOR EQUIPMENT TO BE RECEIVED FROM A NON-MONETARY EXCHANGE ONLY

SELECT ONE:  EQUIPMENT EXCHANGE  WARRANTY EXCHANGE (submit warranty documentation).

Name of Entity exchanging equipment: \_\_\_\_\_ Date: \_\_\_\_\_

Entity Contact Person: \_\_\_\_\_ Phone #: \_\_\_\_\_

Authorized Releasing Agent's Signature (Required\*\*): \_\_\_\_\_ Printed Name: \_\_\_\_\_

\*\*Use attached Letter of Release or Formal Documents.

USE THIS SECTION TO LIST EQUIPMENT CSU WILL BE RECEIVING VIA NON-MONETARY EXCHANGE FOR THE EQUIPMENT LISTED IN THE UPPER SECTION(S):

Description	Description	Description
Yr. Built	Yr. Built	Yr. Built
Manf.	Manf.	Manf.
Model	Model	Model
Serial #	Serial #	Serial #
Building #	Building #	Building #
Room #	Room #	Room #
CSU Asset Rep	CSU Asset Rep	CSU Asset Rep
Acq Cost/FMV	Acq Cost/FMV	Acq Cost/FMV
/	/	/

## CSU EQUIPMENT RELEASE REQUEST

***To protect the University from releasing equipment that may contain contaminants, proprietary information, or other restrictions; please submit this request before relinquishing any equipment.***

**Please provide the following information:**

Requesting Department: \_\_\_\_\_ Date: \_\_\_\_\_

Department Contact Person: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Department Head/Dean Signature (Required): \_\_\_\_\_ Printed Name: \_\_\_\_\_

**This request is for:**

**TRADE-IN:** To be considered a trade-in, CSU must relinquish something in return for a trade-in allowance. NOTE: A quote from the vendor showing the trade-in allowance is required. Check box if this is going Out-to-Bid and no quote is available

**VENDOR REMOVAL:** A vendor may offer to remove equipment with/without charge or offer a discount rather than a trade-in allowance. Restrictions apply to CSU equipment being released without monetary compensation. NOTE: If there is a charge or discount, a quote showing the charge or discount is required.

**EQUIPMENT EXCHANGE:** A non-monetary exchange or a warranty replacement. Restrictions apply.

Comments:

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**SUBMIT THIS REQUEST (INCLUDING THE SUPPLEMENT PAGE AND ANY OTHER REQUIRED DOCUMENTS) TO: PROPERTY MANAGEMENT  
6003 CAMPUS DELIVERY OR EMAIL TO: [DEBRA.ELLISON@COLOSTATE.EDU](mailto:DEBRA.ELLISON@COLOSTATE.EDU)**

**SUPPLEMENTAL PAGE (Required)**



**USE BELOW SECTION TO LIST EQUIPMENT TO BE RELEASED BY TRADE-IN, VENDOR REMOVAL, OR EXCHANGE**

**USE THIS SECTION FOR ACTIVE ASSETS IN KUALI (an Asset Retirement Global Document will be required to retire active Kuali assets):**

DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_  
DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_ DECAL NUMBER \_\_\_\_\_



**USE THIS SECTION FOR RETIRED ASSETS IN KUALI:**

RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_  
RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_ RETIRED DECAL NUMBER \_\_\_\_\_



**USE THIS SECTION FOR INACTIVE DECAL NUMBERS (list in other info), NON-CAPITAL EQUIPMENT OR ANY EQUIPMENT THAT IS NOT FOUND IN KUALI:**

ASSET DESCRIPTION      YR BUILT      MANUFACTURER      MODEL      SERIAL #      ACQ COST/FMV\*      OTHER INFO

<u>ASSET DESCRIPTION</u>	<u>YR BUILT</u>	<u>MANUFACTURER</u>	<u>MODEL</u>	<u>SERIAL #</u>	<u>ACQ COST/FMV*</u>	<u>OTHER INFO</u>
					/	
					/	
					/	
					/	
					/	
					/	
					/	

\*The Acquisition Cost is the amount paid for the item new. The Fair Market Value is price that the item would sell for at present. Please designate which value you are submitting by putting the value on the left (Acq Cost) and/or right (FMV) side of the "/" mark in the Acq Cost/FMV box. Leave either side or both sides blank if unknown.



**FOR TRADE-IN'S, SUBMIT THE QUOTE SHOWING THE ~~TRADE-IN ALLOWANCE~~ FOR THE ABOVE LISTED EQUIPMENT.**

**FOR VENDOR REMOVAL, SELECT ONE:  NO CHARGE  CHARGE \$ \_\_\_\_\_ /DISCOUNT \$ \_\_\_\_\_ (submit the quote showing charge or discount amount).**

**BELOW SECTION IS FOR EQUIPMENT TO BE RECEIVED FROM A NON-MONETARY EXCHANGE ONLY**

**SELECT ONE:**  EQUIPMENT EXCHANGE  WARRANTY EXCHANGE (submit warranty documentation).

Name of Entity exchanging equipment: \_\_\_\_\_ Date: \_\_\_\_\_

Entity Contact Person: \_\_\_\_\_ Phone #: \_\_\_\_\_

Authorized Releasing Agent's Signature (Required\*\*): \_\_\_\_\_ Printed Name: \_\_\_\_\_

**\*\*Use attached Letter of Release or Formal Documents.**

**USE THIS SECTION TO LIST EQUIPMENT CSU WILL BE RECEIVING VIA NON-MONETARY EXCHANGE FOR THE EQUIPMENT LISTED IN THE UPPER SECTION(S):**

Description		Description		Description	
Yr. Built		Yr. Built		Yr. Built	
Manf.		Manf.		Manf.	
Model		Model		Model	
Serial #		Serial #		Serial #	
Building #		Building #		Building #	
Room #		Room #		Room #	
CSU Asset Rep		CSU Asset Rep		CSU Asset Rep	
Acq Cost/FMV	/	Acq Cost/FMV	/	Acq Cost/FMV	/



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THIS SECTION IS FOR PROPERTY MANAGEMENT USE

OSP  CSURF  21 FUND  OTHER AUTHORITY: \_\_\_\_\_

OK to Release  Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_



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THIS SECTION IS FOR SELECTED AUTHORITY USE ONLY (if required) Authority:  EHS  OSP  CSURF  21 FUND  OTHER \_\_\_\_\_

Ok to Release  Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_



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THIS SECTION IS FOR SURPLUS PROPERTY USE

PROPRIETARY INFO  RFLE/EHS  OTHER AUTHORITY: \_\_\_\_\_

OK to Release  Other (use remarks) Remarks: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

**For Department:**

**Once this document has been returned with all necessary signatures, please attach this form, the supplemental page, and any other required documents to your Kualu Document(s).**

# OBTAINING REQUIREMENTS

For write-offs (lost/improper disposal), thefts, cannibalization, destroyed, and software terminations, the department will need the following:

## ***WRITE-OFFS (LOST/IMPROPER DISPOSAL):***

### **TYPES OF DOCUMENTS (Attached in the notes section of the Asset Global Retirement Document)**

*Corrective Action Paperwork stating an explanation of what happened and changes made within the department to avoid future write-offs.*

*Sponsor or Federal formal documents (for all sponsor or federal funded/titled assets)*

### **AUTHORIZATIONS/NOTIFICATIONS:**

*Department Head/APO (Required through routing)*

*Surplus Property (Required through routing)*

*Property Management (Required through routing; NOTE: Property Management will submit any necessary AD HOC's)*

*OSP (Required for all active sponsor or federal funded assets and for all sponsor or federal titled assets)*

*CSURF/BANK (AD HOC for leased assets)*

*Office of Advancement/Tax Accountant (AD HOC for gifts not held for at least 3 years)*

*Cost Accountant (AD HOC for 21 funded assets)*

*EHS (AD HOC for items that have been in contact with chemical, biological, or radioactive material)*



# OBTAINING REQUIREMENTS

## ***THEFT:***

### **REQUIRED DOCUMENTS:**

*Police Report Number*

*Sponsor or Federal formal documents (for all sponsor or federal funded/titled assets)*

### **AUTHORIZATIONS/NOTIFICATIONS:**

*Department Head/APO (Required through routing)*

*Surplus Property (Required through routing)*

*Property Management (Required through routing; NOTE: Property Management will submit any necessary AD HOC's)*

*OSP (Required for all active sponsor or federal funded assets and for all sponsor or federal titled assets)*

*CSURF (AD HOC for leased assets)*

*Office of Advancement/Tax Accountant (AD HOC for gifts not held for at least 3 years)*

*Cost Accountant (AD HOC for 21 funded assets)*

*EHS (AD HOC for items that have been in contact with chemical, biological, or radioactive material)*

# OBTAINING REQUIREMENTS

## ***CANNIBALIZATION/DESTROYED/SOFTWARE TERMINATION***

### **REQUIRED VERIFICATIONS:**

*Property Management or Surplus Property Personnel*

### **AUTHORIZATIONS/NOTIFICATIONS:**

*Department Head/APO (Required through routing)*

*Surplus Property (Required through routing)*

*Property Management (Required through routing; NOTE: Property Management will submit any necessary AD HOC's)*

*OSP (Required for all active sponsor or federal funded assets and for all sponsor or federal titled assets)*

*CSURF (AD HOC for leased assets)*

*Office of Advancement/Tax Accountant (AD HOC for gifts not held for at least 3 years)*

*Cost Accountant (AD HOC for 21 funded assets)*

*EHS (AD HOC for items that have been in contact with chemical, biological, or radioactive material)*

# SUBMITTING THE ASSET EDIT DOCUMENT

From the Main Menu, under Lookup and Maintenance, click on “Asset”.

**Kuali** financial systems Provide Feedback

Main Menu Maintenance Administration

action list doc search

Logged in User: dellison@colostate.edu Login Logout

Message Of The Day

\*\*\*This is the TRAINING Environment\*\*\* Cloned from Prod on 10/27/16\*\*\*

**Transactions**

**Accounts Receivable**

- Cash Control
- Customer Credit Memo
- Customer Invoice
- Customer Invoice Writeoff
- Customer Invoice Writeoff Lookup
- Payment Application

**Budget Construction**

- Budget Construction Selection

**Financial Processing**

- Advance Deposit
- Adjustment/Accrual Voucher
- Budget Adjustment
- Cash Receipt
- Disbursement Voucher
- Distribution of Income and Expense
- General Error Correction
- Indirect Cost Adjustment
- Internal Billing
- Internal Order
- Pre-Encumbrance
- Intra-Account Adjustment
- Single Sided Budget Adjustment
- Transfer of Funds
- Work Order Authorization

**Purchasing/Accounts Payable**

- Contract Manager Assignment
- Payment Request
- Receiving
- Requisition
- Shop Catalogs
- Vendor Credit Memo

**Travel**

- Travel Arranger
- Travel Authorization
- Travel Reimbursement

**Administrative Transactions**

**Capital Asset Builder**

- Capital Asset Builder AP Transactions

**Custom Document Searches**

Financial Transactions

**Accounts Receivable**

- Customer Invoices
- Customer Credit Memos
- Customer Invoice Writeoffs
- Cash Controls
- Payment Applications

**Capital Asset Management**

- Asset Maintenance

**Effort Certification**

- Effort Certification

**Financial Processing**

- Disbursement Vouchers

**Purchasing/Accounts Payable**

- Electronic Invoice Rejects
- Payment Requests
- Purchase Orders
- Receiving
- Requisitions
- Vendor Credit Memos

**Travel**

- Travel Authorization
- Travel Reimbursement

**Lookup and Maintenance**

**Capital Asset Builder**

- Pre-Asset Tagging

**Capital Asset Management**

- Asset
- Asset Fabrication
- Asset Global (Add)
- Asset Location Global
- Asset Payment
- Asset Retirement Global

**Chart of Accounts**

**Balance Inquiries**

**General Ledger**

- Available Balances
- Balances by Consolidation
- Cash Balances
- General Ledger Balance
- General Ledger Entry
- General Ledger Pending Entry
- Open Encumbrances

**Reports**

**Accounts Receivable**

- Billing Statement
- Customer Aging Report
- Customer Invoice

**Effort Certification**

- Duplicate Certifications Report
- Effort Certification Extract Build
- Outstanding Certifications by Chart/Org/Report
- Outstanding Certifications By Report

**General Ledger**

- Trial Balance

**1099 Process**

**Record Maintenance**

- Payer
- Payee
- Payment
- Process Extract History
- Payee 1099 Forms
- 1099 Exception Report

Enter the Tag Number of the asset you are wanting to transfer.

Note: Include an "\*" after the Tag Number to return any additional add-on items that were added in a different fiscal year to the asset.

**Kuali** financial systems Provide Feedback

Main Menu Maintenance Administration KFS 6.0.0 Standalone (Oracle9i)

action list doc search Logged in User: dellison@colostate.edu Login Logout

### Asset Lookup \* required field

Tag Number: <input type="text" value="320448*"/>	Asset Number: <input type="text"/>
Organization Owner Chart Of Accounts Code: <input type="text" value="CO"/>	Organization Owner Organization Code: <input type="text"/>
Organization Owner Account Number: <input type="text"/>	Owner: <input type="text"/>
Campus: <input type="text" value="MC"/>	Building Code: <input type="text"/>
Building Room Number: <input type="text"/>	Asset Type Code: <input type="text"/>
Asset Status Code: <input type="text"/>	Asset Condition: <input type="text"/>
Vendor Name: <input type="text"/>	Manufacturer: <input type="text"/>
Model Number: <input type="text"/>	Serial Number: <input type="text"/>
Create Date From: <input type="text"/>	Create Date To: <input type="text"/>
Asset Representative Principal Name: <input type="text"/>	Organization Inventory Name: <input type="text"/>
Asset Description: <input type="text"/>	Organization Text: <input type="text"/>
National Stock Number: <input type="text"/>	Government Tag: <input type="text"/>
Old Tag Number: <input type="text"/>	Organization Tag Number: <input type="text"/>
Total Cost: <input type="text"/>	Payment Sequence Number: <input type="text"/>
Payment Purchase Order Number: <input type="text"/>	Payment Document Number: <input type="text"/>
Retirement Date From: <input type="text"/>	Retirement Date To: <input type="text"/>
Retirement Period Code: <input type="text"/>	Retirement Fiscal Year: <input type="text"/>

Click on "search".

This will return all assets associated with that tag (decal) number.

**Kuali** financial systems  
Main Menu Maintenance Administration  
KFS 6.0.0 Standalone (Oracle9i)  
Logged in User: dellison@colostate.edu Login Logout  
Asset Lookup ? \* required field

Tag Number: 320448\*  
Organization Owner Chart Of Accounts Code: CO  
Organization Owner Account Number:  
Campus: MC  
Building Room Number:  
Asset Status Code:  
Vendor Name:  
Model Number:  
Create Date From:  
Asset Representative Principal Name:  
Asset Description:  
National Stock Number:  
Old Tag Number:  
Total Cost:  
Payment Purchase Order Number:  
Retirement Date From:  
Retirement Period Code:

Asset Number:  
Organization Owner Organization Code:  
Owner:  
Building Code:  
Asset Type Code:  
Asset Condition:  
Manufacturer:  
Serial Number:  
Create Date To:  
Organization Inventory Name:  
Organization Text:  
Government Tag:  
Organization Tag Number:  
Payment Sequence Number:  
Payment Document Number:  
Retirement Date To:  
Retirement Fiscal Year:

search clear cancel

2 items retrieved, displaying all items.

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
<a href="#">edit</a>   <a href="#">loan</a>   <a href="#">renew</a>   <a href="#">return</a>   <a href="#">merge</a>   <a href="#">separate</a>	1108	320448	6012	0125	A	2006 LONG BOX PICKUP (639FK1)	00010VH	06/30/2006
<a href="#">edit</a>   <a href="#">loan</a>   <a href="#">renew</a>   <a href="#">return</a>   <a href="#">merge</a>   <a href="#">separate</a>	17418	320448-1	6012	0125	A	2006 LONG BOX PICKUP (639FK1)	00010VH	06/30/2008

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

If there is more than one asset returned and the Asset Status Code is "A" (active) for all returned assets, contact Property Management so the assets can be merged into one.

Once Property has merged assets, or if the Asset Status Code is “R” (retired) on additional returned assets, you can submit the asset edit document for the “A” (active) asset.

Asset Lookup

\* required field

Tag Number: 318558*	Asset Number:
Organization Owner Chart Of Accounts Code: CO	Organization Owner Organization Code:
Organization Owner Account Number:	Owner:
Campus: MC	Building Code:
Building Room Number:	Asset Type Code:
Asset Status Code:	Asset Condition:
Vendor Name:	Manufacturer:
Model Number:	Serial Number:
Create Date From:	Create Date To:
Asset Representative Principal Name:	Organization Inventory Name:
Asset Description:	Organization Text:
National Stock Number:	Government Tag:
Old Tag Number:	Organization Tag Number:
Total Cost:	Payment Sequence Number:
Payment Purchase Order Number:	Payment Document Number:
Retirement Date From:	Retirement Date To:
Retirement Period Code:	Retirement Fiscal Year:

search clear cancel

2 items retrieved, displaying all items.

Actions	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
<a href="#">edit</a> <a href="#">loan</a> <a href="#">renew</a> <a href="#">return</a> <a href="#">merge</a> <a href="#">separate</a>	155	318558	1872	0150	A	SPECTROMETER	302551S	06/30/2003
<a href="#">view</a>	2727	318558-1	1872	0150	R	SPECTROMETER	302551S	06/30/2004

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Click on “edit”.

Complete the Description and Explanation\*. Change the Organization Owner Account Number to Surplus Property's default account number "2288400". If needed, you may update the asset condition.

The screenshot displays the Kuali financial systems interface for an asset document. The top navigation bar includes 'Main Menu', 'Maintenance', and 'Administration'. The user is logged in as 'dellison@colostate.edu'. The document status is 'INITIATED' with Doc Nbr: 10468786 and Created: 09:55 AM 12/30/2016.

The 'Document Overview' section shows the following fields:

- \* Description: Transferring Asset to Surplus
- Explanation: \*REASON\*

The 'Asset Detail Information' section is split into 'Old' and 'New' columns:

Old	New
Asset Number: 155	Asset Number: 155
Organization Owner Chart Of Accounts Code: CO	* Organization Owner Chart Of Accounts Code: CO
Organization Owner Account Number: 1338210	Organization Owner Account Number: 2288400
Organization Owner Organization Code: 1872	Organization Owner Organization Code: 1872
Owner: CSU	Owner: CSU
Acquisition Type Code: New	Acquisition Type Code: New
Asset Status Code: A	* Asset Status Code: A
Asset Condition: Good-Operational	* Asset Condition: Poor-Beyond Repair
Asset Description: SPECTROMETER	* Asset Description: SPECTROMETER
Asset Type Code: 3025513	* Asset Type Code: 3025513
Vendor Name: PERKIN ELMER	Vendor Name: PERKIN ELMER
Manufacturer: PERKIN ELMER	Manufacturer: PERKIN ELMER
Model Number: LAMBDA 25	Model Number: LAMBDA 25
Serial Number: 101N3042305	Serial Number: 101N3042305
Tag Number: 318558	Tag Number: 318558
Old Tag Number:	Old Tag Number:
Government Tag:	Government Tag:
National Stock Number:	National Stock Number:
Last Inventory Date: 03/10/2016	Last Inventory Date: 03/10/2016
Create Date: 06/30/2003	Create Date: 06/30/2003
Fiscal Year: 2010	Fiscal Year: 2010

\*When assets are not being physically transferred to Surplus Property, the requested retirement reason should be provided in the explanation field. i.e. Requesting cannibalization. NOTE: If the department wishes to transfer any undesirable parts, resulting from cannibalization, please include that information in the explanation field and Surplus Property will pick up the parts.

# The asset location may also be updated.

Old		New	
<b>On Campus</b>		<b>On Campus</b>	
Campus:	MC	* Campus:	MC
Building Code:	0150	Building Code:	0150
Building Room Number:	C308	Building Room Number:	C308
Building Sub Room Number:		Building Sub Room Number:	
<b>Off Campus</b>		<b>Off Campus</b>	
Name:		Name:	
Address:		Address:	
City:		City:	
State:		State:	
Postal Code:		Postal Code:	
Country:		Country:	
		Update Last Inventory Date:	Update

Organization Information	show
Payments	show
Payments Lookup	show
Land Information	show
Asset Depreciation Information	show
Warranty	show
Repair History	show
Components	show
Lookup Related Capital Asset Document(s)	show
View Purchasing/Financial Asset Documents	show
Notes and Attachments (0)	hide

Notes and Attachments						
	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:			REQUIRED DOCUMENTS	Browse... No file selected. CANCEL		add

Ad Hoc Recipients	show
Route Log	show

submit save close cancel

Attach all requirements in the notes section of the document and then click on "submit".



# SUBMITTING THE ASSET RETIREMENT GLOBAL DOCUMENT

From the Main Menu, under Lookup and Maintenance, click on “Asset Retirement Global”.

**Kuali** financial systems Provide Feedback

Main Menu Maintenance Administration

action list doc search You are not logged in.

**Message Of The Day**  
This is the TRAINING Environment Cloned from Prod on 10/27/16

**Transactions**

- Accounts Receivable**
  - Cash Control
  - Customer Credit Memo
  - Customer Invoice
  - Customer Invoice Writeoff
  - Customer Invoice Writeoff Lookup
  - Payment Application
- Budget Construction**
  - Budget Construction Selection
- Financial Processing**
  - Advance Deposit
  - Adjustment/Accrual Voucher
  - Budget Adjustment
  - Cash Receipt
  - Disbursement Voucher
  - Distribution of Income and Expense
  - General Error Correction
  - Indirect Cost Adjustment
  - Internal Billing
  - Internal Order
  - Pre-Encumbrance
  - Intra-Account Adjustment
  - Single Sided Budget Adjustment
  - Transfer of Funds
  - Work Order Authorization
- Purchasing/Accounts Payable**
  - Contract Manager Assignment
  - Payment Request
  - Receiving
  - Requisition
  - Shop Catalogs
  - Vendor Credit Memo
- Travel**
  - Travel Arranger
  - Travel Authorization
  - Travel Reimbursement

**Administrative Transactions**

- Capital Asset Builder

**Custom Document Searches**

Financial Transactions

- Accounts Receivable**
  - Customer Invoices
  - Customer Credit Memos
  - Customer Invoice Writeoffs
  - Cash Controls
  - Payment Applications
- Capital Asset Management**
  - Asset Maintenance
- Effort Certification**
  - Effort Certification
- Financial Processing**
  - Disbursement Vouchers
- Purchasing/Accounts Payable**
  - Electronic Invoice Rejects
  - Payment Requests
  - Purchase Orders
  - Receiving
  - Requisitions
  - Vendor Credit Memos
- Travel**
  - Travel Authorization
  - Travel Reimbursement

**Lookup and Maintenance**

- Capital Asset Builder**
  - Pre-Asset Tagging
- Capital Asset Management**
  - Asset
  - Asset Fabrication
  - Asset Global (Add)
  - Asset Location Global
  - Asset Payment
  - Asset Retirement Global**
- Chart of Accounts

**Balance Inquiries**

- General Ledger**
  - Available Balances
  - Balances by Consolidation
  - Cash Balances
  - General Ledger Balance
  - General Ledger Entry
  - General Ledger Pending Entry
  - Open Encumbrances

**Reports**

- Accounts Receivable**
  - Billing Statement
  - Customer Aging Report
  - Customer Invoice
- Effort Certification**
  - Duplicate Certifications Report
  - Effort Certification Extract Build
  - Outstanding Certifications by Chart/Org/Report
  - Outstanding Certifications By Report
- General Ledger**
  - Trial Balance

**1099 Process**

- Record Maintenance**
  - Payer
  - Payee
  - Payment
  - Process Extract History
  - Payee 1099 Forms
  - 1099 Exception Report

# ASSET RETIREMENT GLOBAL DOCUMENT

Enter the Retirement Reason Code or Click on “search” for options.

Main Menu Maintenance Administration

[Provide Feedback](#)  
 KFS 6.0.0 Standalone (Oracle9i)

action list doc search

Logged in User: dellison@colostate.edu

Login Logout

Asset Retirement Reason Lookup \* required field

Retirement Reason Code:

Retirement Reason Name:

Retirement Reason Restriction Indicator:  Yes  No  Both

Active Indicator:  Yes  No  Both

search clear cancel

20 items retrieved, displaying all items.

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	Active Indicator
<a href="#">return value</a>	X	Expired Fund - Remaining Equip	Yes	Yes
<a href="#">return value</a>	0	Credit	Yes	Yes
<a href="#">return value</a>	1	Sold	Yes	Yes
<a href="#">return value</a>	2	Trade-in	No	Yes
<a href="#">return value</a>	3	Write-Off (Lost/Improper Disposal)	No	Yes
<a href="#">return value</a>	4	Recycled	Yes	Yes
<a href="#">return value</a>	5	Cannibalized	Yes	Yes
<a href="#">return value</a>	6	Equipment Release	Yes	Yes
<a href="#">return value</a>	7	Theft	No	Yes
<a href="#">return value</a>	8	Destroyed	Yes	Yes
<a href="#">return value</a>	9	External Transfer	No	Yes
<a href="#">return value</a>	A	Auction (public surplus auction)	Yes	Yes
<a href="#">return value</a>	C	Check Canceled	Yes	Yes
<a href="#">return value</a>	E	Asset Created in Error	Yes	Yes
<a href="#">return value</a>	H	Retirement of Control Assets	Yes	Yes
<a href="#">return value</a>	J	General Error Correction	Yes	Yes
<a href="#">return value</a>	M	Merged	Yes	Yes
<a href="#">return value</a>	P	Plant Fund Retirement	Yes	Yes
<a href="#">return value</a>	R	Razed	Yes	Yes
<a href="#">return value</a>	S	Asset Separated Retirement	Yes	Yes

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

# ASSET RETIREMENT GLOBAL DOCUMENT

Click on “return value” for the retirement reason requested.

**kuali** financial systems [Provide Feedback](#)

Main Menu Maintenance Administration KFS 6.0.0 Standalone (Oracle9i)

action list doc search Logged in User: dellison@colostate.edu [Login](#) [Logout](#)

Asset Retirement Reason Lookup \* required field

Retirement Reason Code:

Retirement Reason Name:

Retirement Reason Restriction Indicator:  Yes  No  Both

Active Indicator:  Yes  No  Both

[search](#) [clear](#) [cancel](#)

20 items retrieved, displaying all items.

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	Active Indicator
<a href="#">return value</a>	X	Expired Fund - Remaining Equip	Yes	Yes
<a href="#">return value</a>	0	Credit	Yes	Yes
<a href="#">return value</a>	1	Sold	Yes	Yes
<a href="#">return value</a>	2	Trade-in	No	Yes
<a href="#">return value</a>	3	Write-Off (Lost/Improper Disposal)	No	Yes
<a href="#">return value</a>	4	Recycled	Yes	Yes
<a href="#">return value</a>	5	Cannibalized	Yes	Yes
<a href="#">return value</a>	6	Equipment Release	Yes	Yes
<a href="#">return value</a>	7	Theft	No	Yes
<a href="#">return value</a>	8	Destroyed	Yes	Yes
<a href="#">return value</a>	9	External Transfer	No	Yes
<a href="#">return value</a>	A	Auction (public surplus auction)	Yes	Yes
<a href="#">return value</a>	C	Check Canceled	Yes	Yes
<a href="#">return value</a>	E	Asset Created in Error	Yes	Yes
<a href="#">return value</a>	H	Retirement of Control Assets	Yes	Yes
<a href="#">return value</a>	J	General Error Correction	Yes	Yes
<a href="#">return value</a>	M	Merged	Yes	Yes
<a href="#">return value</a>	P	Plant Fund Retirement	Yes	Yes
<a href="#">return value</a>	R	Razed	Yes	Yes
<a href="#">return value</a>	S	Asset Separated Retirement	Yes	Yes

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

# ASSET RETIREMENT GLOBAL DOCUMENT

**TRADE-IN** – Attach the authorization form and cross reference the requisition number.

The screenshot displays the 'Asset Retirement Global Document' form. At the top, there is a navigation bar with 'action list' and 'doc search' on the left, and 'Logged in User: dellison@colostate.edu' on the right. The form is organized into several sections:

- Document Overview:** Contains fields for '\* Description:', 'Organization Document Number:', and 'Explanation:'. Blue arrows point to the 'Description' and 'Explanation' fields.
- Retirement Information:** Contains 'Retirement Reason Code: 2 - Trade-in' and 'Retirement Date:'. A blue arrow points to the 'Retirement Reason Code'.
- Asset Detail Information:** Contains 'New Asset Retired' and '\* Asset Number:'. A blue arrow points to the 'Asset Number' field.
- Notes and Attachments (0):** A table with columns: 'Posted Timestamp', 'Author', '\* Note Text', 'Attached File', 'Notification Recipient', and 'Actions'. A blue arrow points to the 'Note Text' field, and another points to the 'add' button in the 'Actions' column. The 'Attached File' column shows a 'Browse...' button and 'No file selected.'.
- Ad Hoc Recipients:** A section with a 'show' button.
- Route Log:** A section with a 'show' button.

At the bottom of the form, there is a row of buttons: 'submit', 'save', 'blanket approve', 'close', and 'cancel'. A blue arrow points to the 'submit' button.

# ASSET RETIREMENT GLOBAL DOCUMENT

EXTERNAL TRANSFER – Attach the authorization form.

**Document Overview**

\* Description:

Organization Document Number:

Explanation:

**Retirement Information** hide

**New**

**Retirement Reason**

Retirement Reason Code: 9 - External Transfer

Retirement Date:

**External Transfer or Gift** hide

**New**

Contact Name:

Institution Name:

Street Address:

City Name:

State Code:

Postal Code:

Country Code:

Phone Number:

**Asset Detail Information** hide

**New Asset Retired** Look Up/Add Multiple Asset Lines

\* Asset Number:  add

**General Ledger Pending Entries** show

**Notes and Attachments (0)** hide

	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:			<input type="text"/>	<input type="text"/> No file selected. <input type="button" value="Browse..."/> <input type="button" value="CANCEL"/>		<input type="button" value="add"/>

**Ad Hoc Recipients** show

**Route Log** show

# ASSET RETIREMENT GLOBAL DOCUMENT

## WRITE-OFF (LOST/IMPROPER DISPOSAL) – Attach the Action Plan

action list doc search Logged in User: dellison@colostate.edu Login Logout

\* required field

Document Overview hide

**Document Overview**

**\* Description:**

**Explanation:**

**Organization Document Number:**

Retirement Information hide

**New Retirement Reason**

**Retirement Reason Code:** 3 - Write-Off (Lost/Improper Disposal)

**Retirement Date:**

Asset Detail Information hide

**New Asset Retired** Look Up/Add Multiple Asset Lines

**\* Asset Number:**

General Ledger Pending Entries show

Notes and Attachments (0) hide

	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:			<input type="text"/>	<input type="button" value="Browse..."/> No file selected. <input type="button" value="CANCEL"/>		<input type="button" value="add"/>

Ad Hoc Recipients show

Route Log show

# ASSET RETIREMENT GLOBAL DOCUMENT

**THEFT** – Provide Police Case Number.

action list doc search Logged in User: dellison@colostate.edu [Login](#) [Logout](#)

Asset Retirement Global Doc Nbr: 10468951 Status: INITIATED  
Initiator: dellison@colostate.edu Created: 10:01 AM 01/10/20

[expand all](#) [collapse all](#)  
\* required field

Document Overview hide

**Document Overview**

\* Description:

Organization Document Number:

Explanation:

Retirement Information hide

**New Retirement Reason**

Retirement Reason Code: 7 - Theft

Retirement Date:

Theft hide

**New**

Police Case Number:

Asset Detail Information hide

**New Asset Retired**

\* Asset Number:   Look Up/Add Multiple Asset Lines

General Ledger Pending Entries show

Notes and Attachments (0) show

Ad Hoc Recipients show

Route Log show

# UNAUTHORIZED DISPOSAL FORM

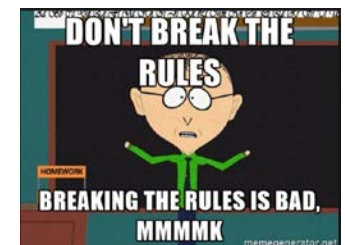
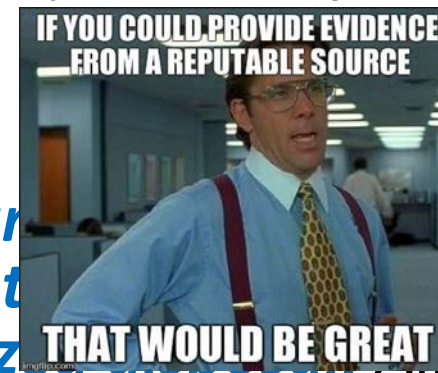
Property Management acknowledges that assets may accidentally be released without obtaining prior authorizations. There are two types of situations:

## UNAUTHORIZED DISPOSAL

- *An Unauthorized Disposal is when equipment or software is cannibalized, exchanged, terminated, destroyed, removed by a vendor, or externally transferred without obtaining proper authorizations. In order for the asset to be retired due to an unauthorized method of disposal, verification is required using an acceptable method of proof.*

## IMPROPER DISPOSAL

- *An Improper Disposal is when equipment is unacceptably damaged, donated, thrown away, or scrapped; or the department does not provide the acceptable method of proof for an unauthorized disposal. Improper disposals require the asset to be retired as a Write-Off and the department will need to complete an Inventory Action Plan found on the Property Management web page under Forms. link: [InventoryActionPlan](#)*





DEPARTMENT: \_\_\_\_\_ Date: \_\_\_\_\_

The following listed equipment was released or disposed of without obtaining proper authorizations.

Decal: \_\_\_\_\_ Code       Decal: \_\_\_\_\_ Code       Decal: \_\_\_\_\_ Code

UNAUTHORIZED METHOD OF DISPOSAL	ACCEPTABLE METHOD OF PROOF
<input checked="" type="checkbox"/> Cannibalized	Decal and/or remaining parts verified
<input checked="" type="checkbox"/> Exchanged	Vendor documentation (warranty) and new asset information provided
<input checked="" type="checkbox"/> Software Termination	Search computer to verify software has been removed
<input checked="" type="checkbox"/> Destroyed	Decal and/or remaining parts verified or insurance claim information provided
<input checked="" type="checkbox"/> Vendor Removal	Provide PO # _____ for repair/replacement part
<input checked="" type="checkbox"/> External Transfer	Shipping documentation showing asset returned to Sponsor or Vendor
<input checked="" type="checkbox"/> Trade-In*	Provide PO # _____ with quote showing trade-in allowance

\*For Trade-Ins only, the department will need to submit an Asset Retirement Global document, reason: Trade-In for the listed asset and attach this fully signed form.

➔ **Department to Complete:**

*Federal and University guidelines, policies, and procedures state any movement, loan, responsibility change, maintenance, and retirement of capital equipment must be recorded in the Capital Asset Management (CAM) database. In order to protect the University and Departments from improper disposals, multiple authorizations are required when equipment is being released or disposed of.*

**Provide comments explaining why guidelines, policies, and procedures were not followed and future steps to avoid unauthorized disposals:**

---

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---

➔ **Required Signatures:**

**Dept. DPC Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Asset Rep/PI Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Dept. Head/Director Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Return this signed form to [BFS\\_Property\\_Management@mail.colostate.edu](mailto:BFS_Property_Management@mail.colostate.edu) or 6003 Campus Delivery.

➔ **FOR PROPERTY MANAGEMENT USE ONLY**  
**VERIFIED BY:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**NOTE: EXCESSIVE UNAUTHORIZED DISPOSALS MAY RESULT IN LOSS OF PRIVILAGES OF THE UNAUTHORIZED DISPOSAL FORM AND THE DEPARTMENT MAY NEED TO WRITE-OFF ASSETS FOR FUTURE INFRACTIONS UNTIL PROPERTY MANAGEMENT DETERMINES THE DEPARTMENT IS FOLLOWING PROPER PROCEDURES.**

QUESTIONS?

# Thank you from the Property Management Team

491-2899 Jacque Clark – Property Administrator/Cost Accountant

491-6513 Laila Dillsi – Lease / Property Accountant

491-7362 Cheri Richardson – Cost Accountant

491- 2270 Debra Ellison – Admin Asst. / Acct Tech III

491-1045 Rachel Drenth – Inventory Specialist / Data Entry

491-1358 Michelle Miller (Jan 17) – Inventory Specialist / Data Entry

- We are available to help