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, as well as environmental rules and regulations, apply to disposal methods of all university acquired property.

In order to protect the university and departments from any violations; Surplus Property has sole responsibility for determining the appropriate disposal method of all excess university owned property, other than land and buildings, and for authorizing or accomplishing such disposal.

When a department is ready to relinquish or retire an asset, the appropriate document needs to be submitted and necessary requirements must be obtained.

**NO EQUIPMENT SHOULD BE DISCARDED BY THROWING IT IN THE TRASH**
DISPOSAL REQUEST DOCUMENTS
(TRANSFERRING VS RETIRING)

TRANSFERRED 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.
The Asset Edit document is still used even when the asset may not be physically transferred to Surplus Property. Depending upon the disposal method, even though the asset may not be physically transferred to surplus, the appropriate disposal request document may still need to be submitted to transfer the asset to Surplus Property’s inventory in order for it to be retired.

The following disposal methods require transferring the asset to Surplus Property:

- **Sold:** Departments and individuals are restricted from unilaterally releasing any university owned property by making, negotiating, or authorizing any sale of equipment to an individual, firm, vendor, non-university, or university agency (including department-to-department sales).

- **Cannibalized:** Departments should request verification when needing to cannibalize a capital asset.

- **Equipment Release:** Departments and individuals are restricted from unilaterally releasing any university owned property by making, negotiating, or authorizing any external transfer, trade, or donation of equipment to any individual, firm, vendor, university, or non-university agency.

- **Destroyed:** Departments should promptly report covered losses to Risk Management and Property Management acknowledges that some items may need immediate disposal. To minimize risk of improper disposal, do not throw the item directly in the trash. Contact Surplus Property or Environmental Health Services (if warranted) immediately for appropriate disposal instructions. If the damaged item does not require immediate disposal, contact Property Management at the time of the loss to request verification of the destroyed capital asset. Departments can provide insurance documents listing items damaged that may also serve as verification of a loss.

- **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 Disposal)**

• **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 Kuali 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.
EXTERNAL TRANSFER FORM

**APPLICATION EXTERNAL TRANSFER FORM**

**ALL EXTERNAL TRANSFERS REQUIRE THE FOLLOWING:**

- Name of the person responsible for the transfer.
- Signature of the person responsible for the transfer.
- Date of the transfer.

**PURPOSE:**

- **Equipment:** All equipment transferred shall be recorded in the Control Log.
- **Software:** All software transferred shall be recorded in the Control Log.

**RECEIVING DEPARTMENT:**

- Name of the department receiving the equipment.
- Department Control Number or Department Control Number.

**SUPPORTING DOCUMENTS:**

- Copy of purchase order or invoice.
- Copy of shipping documentation.

**AUTHORIZED SIGNATURES:**

- signatures of all authorized personnel involved in the transfer.

**ATTACHMENTS:**

- All supporting documents and any additional information relevant to the transfer.

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**SUPPORTING DOCUMENTS:**

- All equipment transferred shall be recorded in the Control Log.
- Software transferred shall be recorded in the Control Log.

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**AUTHORIZED SIGNATURES:**

- signatures of all authorized personnel involved in the transfer.

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**ATTACHMENTS:**

- All supporting documents and any additional information relevant to the transfer.

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**RECEIVING DEPARTMENT:**

- Name of the department receiving the equipment.
- Department Control Number or Department Control Number.

---

**SUPPORTING DOCUMENTS:**

- Copy of purchase order or invoice.
- Copy of shipping documentation.

---

**AUTHORIZED SIGNATURES:**

- signatures of all authorized personnel involved in the transfer.

---

**ATTACHMENTS:**

- All supporting documents and any additional information relevant to the transfer.
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 S3 fund related? ___ YES (S3 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 ___ RF/LE /EHS ___ OTHER AUTHORITY: __________________________ SALE NEGOTIATED: ___ YES ___ NO

___ OK to Release ___ Other (use remarks) Remarks: __________________________

By: __________________________ Date: __________________________

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- 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 __ S3 Closed (S3 FUND ____________) transferring equipment back to Sponsor/Federal Agency __ Other: __________________________

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

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PLEASE SUBMIT THIS REQUEST AND ALL REQUIRED DOCUMENTS TO PROPERTY MANAGEMENT 6003 CAMPUS DELIVERY OR DEBRA.ELLISON@COLOSTATE.EDU.
SUPPLEMENTAL PAGE

LIST OF EQUIPMENT

USE THIS SECTION FOR ACTIVE ASSETS IN KUALI:

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<thead>
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<th>DECAL NUMBER</th>
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USE THIS SECTION FOR RETIRED ASSETS IN KUALI:

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<th>RETIRED DECAL NUMBER</th>
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USE THIS SECTION FOR NON-CAPITAL EQUIPMENT OR INACTIVE DECAL NUMBERS NOT FOUND IN KUALI:

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<thead>
<tr>
<th>ASSET DESCRIPTION</th>
<th>MANUFACTURER</th>
<th>MODEL</th>
<th>SERIAL NUMBER</th>
<th>ADDITIONAL INFO (DECAL # NOT IN KUALI, ETC.)</th>
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☐ 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 Kuali documents to be submitted.

CSU TITLED EQUIPMENT: If a sale has been negotiated, an Asset Edit document (for all Active Kuali assets) or an Electronic EACR (for assets not in Kuali) 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.
CSU EQUIPMENT RELEASE REQUEST

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

Please provide the following information:

- Requesting Department:
- Date:
- Equipment Contact Person:
- Phone Number:
- Department Chair/Signatory (Required):
- Position:

This request is for:

☐ Transfer: To be considered a transfer, CSU must relinquish control of the asset in accordance with a signed Transfer Agreement.

☐ Divestiture: A CSU employee is required to sell the asset. CSU must receive 100% of the value paid at the time of sale. Note: This information should be entered into the Asset Management System.

☐ Vendor Return: A vendor may offer to return equipment with a discount or offer a discount rather than return the equipment. Restrictions apply to CSU equipment being released without monetary compensation. Note: If there is a charge or discount, a quote should accompany the change of ownership.


Submit this request (including the Supplemental Page), and any other required documents to the Property Management Branch Campus Security or email to: CSURC@colorado.edu

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**SUPPLEMENTAL PAGE (Required)**

**USE THIS SECTION TO LIST EQUIPMENT TO BE RELEASED BY TRANSFER, DIVESTITURE, REMOVAL, OR EXCHANGE**

**USE THIS SECTION TO UPDATE ASSETS INVENTORY TO ASSET MANAGEMENT SYSTEM (Required)**

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*This Acquisition Cost is the amount paid for the item new. The Fair Market Value should not exceed three times the purchase price. Please supervise third parties submitting purchase orders for the equipment. Please ensure that the purchase is for the correct equipment.*

---

**RECEIVED**

- Date:
- [Signature]

**RELEASER**

- Date:
- [Signature]

---

**FOR DEPARTMENT**

Once this document has been released with all necessary signatures, please attach this form, the supplemental page, and any other required documents to your Record Document(s).
CSU EQUIPMENT RELEASE REQUEST

To protect the University from releasing equipment that may contain contaminatees, 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 compensations. 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 SUPPLEMENT PAGE AND ANY OTHER REQUIRED DOCUMENTS) TO: PROPERTY MANAGEMENT
6003 CAMPUS DELIVERY OR EMAIL TO: 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):**

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

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

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<thead>
<tr>
<th>ASSET DESCRIPTION</th>
<th>YR BUILT</th>
<th>MANUFACTURER</th>
<th>MODEL</th>
<th>SERIAL #</th>
<th>ACQ COST/FMV*</th>
<th>OTHER INFO</th>
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*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):**

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<td>Acq Cost/FMV</td>
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<td>Acq Cost/FMV</td>
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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 Kuali 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)

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

SUBMITTING THE ASSET EDIT DOCUMENT
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.

Click on “search”.

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

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. Click on “edit”.

Click on “edit”.

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.

*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.
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”.

[Image of a computer screen showing the Main Menu and highlighting the “Asset Retirement Global” option]
Enter the Retirement Reason Code or Click on “search” for options.

### ASSET RETIREMENT GLOBAL DOCUMENT

#### Retirement Reason Lookup

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<th>Retirement Reason Name</th>
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<td>Write-Off (Lost/Improper Disposal)</td>
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<tr>
<td>4</td>
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<td>Yes</td>
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<td>6</td>
<td>Equipment Release</td>
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<tr>
<td>9</td>
<td>External Transfer</td>
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<td>A</td>
<td>Auction (public surplus auction)</td>
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<td>J</td>
<td>General Error Correction</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
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<tr>
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<td>Merged</td>
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<td>Yes</td>
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<td>Yes</td>
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<td>Kazed</td>
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Export options: CSV | spreadsheet | XML
Click on “return value” for the retirement reason requested.

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<th>Retirement Reason Restriction Indicator</th>
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<td>Yes</td>
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<td>Trade-in</td>
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<td>Write-Off (Lack/Improper Disposal)</td>
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<td>4</td>
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<td>Yes</td>
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<td>Yes</td>
<td>Yes</td>
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</tbody>
</table>
ASSET RETIREMENT GLOBAL DOCUMENT

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

<table>
<thead>
<tr>
<th>Document Overview</th>
<th>Description:</th>
<th>Explanation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement Information</td>
<td>Organization Document Number:</td>
<td></td>
</tr>
</tbody>
</table>

**New Retirement Reason**

- **Retirement Reason Code:** External Transfer
- **Retirement Date:**

**External Transfer or Gift**

- **Contact Name:**
- **Organization Name:**
- **Address:**
- **City Name:**
- **State Code:**
- **Postal Code:**
- **Country Code:**
- **Phone Number:**

**Asset Details Information**

**New Asset retired**

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

**General Ledger Pending Entries**

**Notes and Attachments (0)**

**Notes and Attachments**

- **Posted Timestamp:**
- **Author:**
- **Note Text:**
- **Attached File:**
- **Notifications Recipient:**
- **Actions:**
ASSET RETIREMENT GLOBAL DOCUMENT
WRITE-OFF (LOST/IMPROPER DISPOSAL) – Attach the Action Plan

---

<table>
<thead>
<tr>
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</thead>
<tbody>
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<td>Description</td>
</tr>
<tr>
<td>Organization Document Number</td>
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<tr>
<td>Explanation</td>
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</tbody>
</table>

<table>
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<th>Retirement Information</th>
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<tbody>
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<td>Retirement Reason Code:</td>
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<td>Retirement Date:</td>
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</table>

<table>
<thead>
<tr>
<th>New Asset Retired</th>
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<tbody>
<tr>
<td>Asset Number:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Notes and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
</tr>
<tr>
<td>Note Text</td>
</tr>
<tr>
<td>Attached File</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Ad Hoc Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Log</td>
</tr>
</tbody>
</table>

---

Actions: Submit, Save, Blanket Approve, Close, Cancel
THEFT – Provide Police Case Number.
UNAUTHORIZED DISPOSAL FORM

Property Management acknowledges that assets may accidently 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 unilaterally sold, donated, thrown away, or scrapped; or the department is unable to 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
The following listed equipment was released or disposed of without obtaining proper authorizations.


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

*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:

________________________________________________________

________________________________________________________

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 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
491-2270 Debra Ellison – Admin Asst. / Acct Tech III
491-6513 Laila Dillsi – Lease / Property Accountant
491-1045 Rachel Drenth – Inventory Specialist / Data Entry
491-1358 Michelle Miller (Jan 17) – Inventory Specialist / Data Entry

• We are available to help