KUALI TIPS FOR CAPITAL ASSETS

OBJECT CODES
HOW TO DETERMINE WHICH OBJECT CODE TO USE:
To determine which Object Code you should use, you will need to look up the Account Fund Source Code and, if using Research Funds, also look up the Research Project Status Report (RPS page from Sponsored Programs) for the Title (CSU, Conditional, Sponsor or Federal).   Object codes are also determined by the funding (77/53, etc.) and the type of asset you are purchasing.

LOOKING UP THE FUNDING SOURCE ON AN ACCOUNT:
In any document you are creating, you can click on the account number; this will bring up the Account Inquiry Screen. There are several tabs on this screen; scroll down to the Central Administration Tab. There will be a Fund Source Code with a number listed (you may click on the number to reveal the fund source description).

LOOKING UP THE ASSET TYPE CODE:
Capital Equipment Asset Type Codes end in the following letters: SI (Scientific Instruments); OF (Office Equipment-furniture, etc.); IS (Info Systems-computer hardware, etc.); ME (Machinery-farm/ground, tractors, shop/maintenance, etc.); RE (Recreation Equipment-includes ATV's, Golf Carts, etc.); VH (Vehicles-Buses, Trucks, Vans, Automobiles and Motorcycles); VH* (*Other Vehicles- includes watercraft, aircraft, trailers, and snowmobiles); SW** (Software-stand-alone); and AH (Art/Museum Objects). If you are unable to locate the Asset Type Code, try searching with a wild card (*) on both sides of a portion of the word (i.e. *micro* for microscope).
*Aircraft, Golf Carts, ATV's, Watercraft, Snowmobiles, and Trailers should be treated like equipment (not vehicles) when determining which object code to use.
 **If software is loaded into equipment, use the equipment object code not the SW object code.

CAPITAL EQUIPMENT OBJECT CODE CHEAT SHEET:

DECAL #	FUNDING/TITLE	FUND SOURCE CODES	ASSET TYPE CODES/NOTES	OBJECT CODE
3	CSU FUNDED EQUIP/CSU TITLE	11, 61, 71	SI, OF, IS, ME, RE, VH* (ATV'S, WATERCRAFT, TRAILERS, ETC)	8210
3	CSU FUNDED VEHICLE/CSU TITLE	11, 61, 71	VH (CARS, TRUCKS, VANS ,BUSES, AND MOTORCYCLES ONLY)	8250
3	CSU FUNDED SOFTWARE/CSU TITLE	11, 61, 71	SW (STAND-ALONE/>$5K/CSU OWNS LICENSE)	8260
7	CSU FUNDED ART MUSEUM OBJECTS/CSU TITLE	11, 61, 71	AH (NON DEPRECIATING)	8280
3	(53/Other) SPON FUNDED/CSU TITLE	21, 31, 33, 35	SI, OF, IS, ME, RE, VH* (ATV'S, WATERCRAFT, ETC)	8230
5	(53) SPON FUNDED/SPONSOR TITLE	21, 22, 31, 32, 33, 34, 35	ALL INCLUSIVE EQUIP TYPES, NO SPLIT FUNDING	8235
3	(53/Other) FED FUNDED/CSU TITLE	22, 32, 34, 41 ,51	SI, OF, IS, ME, RE, VH* (ATV'S, WATERCRAFT, ETC)	8240
6	(53) FED FUNDED/FEDERAL TITLE	22, 32, 34, 41, 51	ALL INCLUSIVE EQUIP TYPES, NO SPLIT FUNDING	8245
3	(53/Other) FED FUNDED VEHICLES/CSU TITLE	22, 32, 34, 41, 51	VH (CARS, TRUCKS, VANS, BUSES, AND MOTORCYCLES ONLY)	8255
3	(53/Other) FED FUNDED SOFTWARE/CSU TITLE	22, 32, 34, 41, 51	SW** (STAND-ALONE/>$5K/CSU OWNS LICENSE)	8265
3	(99/Other) COUNTY EXT SHARED COST/CSU TITLE	61, 71	MOST 99 ACCOUNTS, 4XXX ORG CODE	8270
3	(77) CSU FUNDED EQUIP/CSU TITLE	11, 61, 71	SI, OF, IS, ME, RE, VH*(ATV'S, WATERCRAFT, ETC)	8910
3	(77) CSU FUNDED VEHICLE/CSU TITLE	11, 61, 71	VH (CARS, TRUCKS, VANS, BUSES, AND MOTORCYCLES ONLY)	8915
3	(77) CSU FUNDED SOFTWARE/CSU TITLE	11, 61, 71	SW** (STAND-ALONE/>$5K/CSU OWNS LICENSE)	8930
7	(77) CSU FUNDED ART MUSEUM OBJECTS/CSU TITLE	11, 61, 71	AH (NON DEPRECIATING)	8900

LEASE PAYMENT OBJECT CODES BY FUNDING AND TYPE OF EQUIPMENT:

8300	FURNITURE/FIXTURE/LA/LP/CSU TITLE	LEASE PAYMENT FURNITURE
8310	OTHER CAP EQUIP/LA/LP/CSU TITLE	LEASE PAYMENT OTHER CAP EQUIP
8320	OTHER REAL PROP/LP/CSU TITLE	LEASE PAYMENT OTHER REAL PROP
8920	(77) FURNITURE/FIXTURE/LA/LP/CSU TITLE	CONSTRUCTION LEASE PAYMENT FURNITURE
8925	(77) OTHER CAP EQUIP/LA/LP/CSU TITLE	CONSTRUCTION LEASE PAYMENT OTHER CAP EQUIP

LOOKING UP TITLE FOR SPONSOR/FEDERAL FUNDING

Below is a chart for finding the correct object code to use with the Fund Source code and Title (Title is found on the RPS Report).
FYI: Sponsored Program's RPS Reports are NOT updated with the new Kuali object codes and may or may not list the correct object code, so only look at the Title Description, not the object code listed.   If it says "Conditional Title", use the CSU title object code (see below regarding Conditional Equipment).

CONDITIONAL EQUIPMENT:

Object Codes 8420 and 8220 are no longer be available. The Conditional Title is now reflected in the Owner Field on the asset record in CAM. For object code purposes, treat Conditional title as you would CSU title.

53 FUND OBJECT CODE CHEAT SHEET:

ACCOUNT FUNDING SOURCE	RPS REPORT (SPONSORED PROGRAMS)		
	SPONSOR TITLE	CSU TITLE	FEDERAL TITLE
22	8235	8240/8255/8265	8245
32	8235	8240/8255/8265	8245
34	8235	8240/8255/8265	8245
41	-	8240/8255/8265	8245
51	-	8240/8255/8265	8245
Below are Object Codes based upon CSU funding and/or Other Funding Sources			
11	-	8210/8250/8260	-
21	8235	8230	-
31	8235	8230	-
33	8235	8230	-
35	8235	8230	-
61	Split funding not allowed	8210/8250/8260	Split funding not allowed
71	Split funding not allowed	8210/8250/8260	Split funding not allowed

21 FUNDS

Please use the Object Codes below:
8210 – Recharge Equipment
8250 – Recharge Vehicle
8260 – Recharge Software
NOTE: No split funding 21 fund equipment purchases and you must obtain an EAR number (approval) for 21 fund capital purchases.

CAPITAL EQUIPMENT DEFINITION

Equipment includes items which are not considered an integral part of a University building, are non-expendable, do not lose their identity through incorporation into a more complex unit, have a useful life of more than a year, and have an acquisition cost of $5,000 or more, or another threshold if set by a contract, grant, or agreement. An item is non-expendable if it is characteristically restored to service by replacement of lost, worn or damaged parts. The acquired value of a University purchased item of non-expendable personal property should be recorded as the net invoice unit price of the property including cost of modification, attachments, accessories, or auxiliary apparatus necessary to make the property usable for the purpose of which it was acquired.

EXAMPLES OF SERVICE COSTS THAT CAN BE CAPITALIZED WITH EQUIPMENT PURCHASES:

1. Cost of assembling the asset
2. Cost of installation
3. Freight/Shipping
4. In-transit Insurance
5. Preparing the site and asset for its intended use

EXAMPLES OF SERVICE COSTS THAT ARE NOT CAPITALIZED WITH EQUIPMENT PURCHASES:

1. Repair or replacement parts (6202)
2. An item or substance that has no shape or identity, or loses that shape or identify upon detachment or removal from its original location
3. Maintenance and Warranty agreements (6602/6601)
4. Training (6601)
5. Software license agreements are not capitalized unless ownership is indicated within the license agreement. Software license agreements not indicating ownership should be expensed to object code 6225 Computer Hard/Software or 6201 General Supplies.

COMPLETING REQUISITIONS

When creating line items, the requisition should match the quote. If a dollar amount is next to a line item on the quote, it should have a line item on the requisition. Avoid grouping multiple lines on the quote into one line on the requisition. If you have a discount, contact Procurement to help you line item your requisition. If you are using shop catalog, the quote should be uploaded from the shop catalog site and not manually entered into the requisition. Contact Procurement with any questions regarding uploading quotes.

CAPITAL ASSET TAB

Capital Asset System type:

One System: This is used when all of the lines will be combined (all lines have a capital object code) to make one or multiple identical assets.

Individual Assets: This is used when no lines will be combined and each line with a capital asset object code will create its own individual asset or (if the quantity is 2 or more) multiple identical assets. The individual item cost of each asset should meet capital criteria (over $5,000.00).

Multiple Systems: This is used when you have mixed capital and non-capital object codes or when One System or Individual Assets is not appropriate. This option is for combining capital object code lines in a specific manner. The Capital Asset Note Text is used to describe the way the lines should go together to form the asset(s). This option is also used when you select "modify existing" as the Capital Asset System State. NOTE: If combining requisitions to create capital assets, use Multiple Systems and cross-reference docs in the Capital Asset Note Text section.

Capital Asset System State:

New System: Use this for new equipment being purchased.

Modify Existing: Use this for adding-to or upgrading an existing active asset in Kuali.

Capital Asset Note Text: Use this section to describe the way the lines should go together to form the asset(s). This is important because it lets the asset creator know what line items go together and how many assets need to be created. Example: Combine lines 1-4 to make one asset, line 5 is a separate asset, line 6 & 7 make one asset, etc. NOTE: Also, use to list cross-referenced docs.

Capital Asset System Description: This section identifies the asset(s) you are purchasing. You can also use this description to find the Asset Type Code. For example, you may have: Asset 1 is a washer, Asset 2 is a dryer…or Asset 1 is a camera with a lens, Asset 2 is a telescope…or Asset 1 is a camera with a lens and case.

WHAT TO DO IF YOUR DOCUMENT IS DISAPPROVED

You will receive the document back into your action list. Write down the document number. Go into the document and scroll to the bottom and click on "acknowledge". Once you acknowledge the document, you will need to do a doc search and locate it again. Go into the document and at the bottom, click on "copy". This will transfer most of the information into a new document (so you don't have to retype the whole document). You will need to reattach any notes/attachments that you had in the previous document. If you have multiple lines with several accounts, there is a "remove accounts from all items" button. Once cleared, you can use the "setup distribution" button again versus going into each line and adjusting each object code separately. After you have completed the required new information (which may include completing the Capital Asset Tab) and you have reattached your notes and attachments, hit the submit button and it will route through again. You can always call for assistance in recreating the document or completing the required information. Note: Shop catalog docs will not allow the "copy" feature.

TRANSFERRING EQUIPMENT TO SURPLUS PROPERTY

The Surplus Department Organization Number is **6026**. Use an Asset Edit document in CAM to surplus active capital equipment. Select "edit" from the asset actions next to the asset number; complete the Description, change the Organization Owner Account Number to 2288400 (default for surplus) and submit your document. For all inactive Kuali assets or non-capital assets, complete the electronic EACR to transfer equipment to surplus.

OTHER DISPOSAL METHODS

To avoid unauthorized disposals or improper disposals, contact Property Management for assistance.
Departments should not negotiate the sale of any equipment without contacting Surplus Property for assistance.

Trade-In's, Vendor Removal, and Equipment Exchanges all need prior authorization. Use the CSU Equipment Release Request form to obtain prior authorization before releasing any equipment.

External Transfers need prior authorization. Use the Equipment External Transfer Form to obtain prior authorization before transferring any equipment.

INCOMING EQUIPMENT

Loaned Equipment, Transferred-In Equipment, Direct Donations and Gift-In-Kind all need to be reported*.* All Gift-In-Kind donations are required to go through Development and Advancement Information Services. Contact Advancement at 970-491-3416. For all other incoming equipment, complete the Incoming Property Declaration Form found on Property Management's webpage.

FINAL NOTE

 Remember the Asset Number is NOT the Decal Number. You can look up the decal number by pressing the magnifying glass icon next to the asset number. This takes you to the Asset Lookup screen. Type the decal number in the tag number field and press 'search' to get the asset number for the item. Press 'return value' to populate your document. Please feel free to call Property Management if you have questions.