Sign On to the Training Site

- CSU CAP (Campus Administration Portal)
  [http://padroni.is.colostate.edu:7778/portal/page/portal/CSUCA P](http://padroni.is.colostate.edu:7778/portal/page/portal/CSUCA P)
  OR
  [http://padroni.is.colostate.edu:7778/portal/page/portal/CAPQA](http://padroni.is.colostate.edu:7778/portal/page/portal/CAPQA)
  (THEN CHOOSE QUAL 2)

- Non-production Applications:
  Training Kuali Financial System (KFS)
Definitions of Asset Management roles
What is a CAM Processor and why do we designate that authority?
Department Property Contact role

PDF DOCUMENTS YOU OCCASIONALLY NEED TO KNOW HOW TO FILL OUT:
Transfer in document
Action plan for Inventory Reconciliation
Authorized signers form
EACR’s

WHAT AND HOW TO DO:
Trade in
External transfer
Retirement /Retirement global
Cannibalize
Modify Existing

HOW TO PULL AND READ REPORTS:
Loan Report
Loaned by Sponsor
Maintenance report
Jasper inventory list

CAM DOCUMENTS:
Edits
Loans
We are here to ensure compliance with Federal, State and CSU regulation, policy, and procedures in regard to the stewardship entrusted to the University by the taxpayers, Federal or Sponsor agencies, and Donators.

We provide guidance and training to the department APO and CAM’s in the proper handling of all property, capital and non-capital within the department unit.
This person would be the:

- Dean or Department Head in the case of the colleges on campus
- Controller or Director for administrative or facility departments
- President of the group or board
- Chief in the case of the Police Department

This is the individual who is accountable to the provost office for compliance with state policy and procedures.

Fiscal policy requires the APO to sign the capital asset inventory certificate results and any action plan or documentation required if the unit has not met the minimum requirements.

The APO has the authority to designate one or more DPC’s to act on their behalf in matters relating to property management both capital and non-capital, and to appoint authorized signers for the disposition of non-capital property.
CAM Processor

Authorized by the APO to manage capital asset equipment within the department from arrival on campus, throughout the lifecycle, and through end of life disposition.

- This person is fluent in regulations and procedures needed to stay in compliance with CSU, State, and Federal policies for the management of property.
- The CAM processor makes regular adjustments to the capital asset property record in order for the record to correctly reflect current location, status, and user.

Often the person in this role is also the DPC or primary contact for the Property Management Department for all things capital asset related.
in addition to the duties of the CAM Processor, Property Management will work with the DPC as the point person for all matters property related including:

- Conducting of the biennial inventory and reconciliation
- Spot audits by us or as requested by any outside agency
- Property record maintenance of capital equipment
- CAM transfers of capital asset property for disposition
- The accurate disposition of non-capital property on EACR’s.

**DPC-Department Property Contact** The DPC is someone

- familiar with the equipment being used in the department unit
- in regular contact with the Asset Representatives*
- and has the authority to enforce applicable policy and procedures within the department.
Asset Representative

The Asset Representative works closely with the CAM Processor to ensure the property record is kept accurate at all times.

*Asset Representatives*: typically the lab manager or the person supervising the use of the equipment.

This person is:

- Scheduling maintenance as applicable
- Assigning and managing tasks associated with the equipment
- Familiar with the operation and function of the equipment
- Responsible for the care and safeguarding of the equipment
Authorized Signer

Appointed by the APO to properly disposition non-capital equipment within the department unit.

Authorized Signers:

- This role has been trained by the DPC in the regulations and fiscal policies.
- They should be comfortable with how to look up asset records to verify whether the equipment in question is part of the departments’ portfolio of depreciating capital assets prior to disposition to Surplus.
- They take responsibility for filling out the EACR correctly and can provide guidance to their colleagues to do the same.

This role does not have the authority to disposition capital assets.
Agenda

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WHAT IS A CAM PROCESSOR AND WHY DO WE DESIGNATE THAT AUTHORITY?
Responsibility for capital assets
Department Property Contact role and responsibilities

WHAT IS A MOVABLE CAPITAL ASSET?

WHEN AND HOW TO DO:
Trade in
External transfer
Retirement /Retirement global
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Modify Existing

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Jasper inventory list

CAM DOCUMENTS:
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Loans
It is important to remember that CAM houses many asset categories (i.e. art, buildings, land, leasehold improvements, library books, and equipment) These groups are further defined into non-movable and movable assets. Art, buildings, land, leasehold improvements, and library books are considered non-movable assets.

Generally the term “movable" includes property or equipment that is not permanently attached to a building.

- Software
- Vehicles
- Sculptures
- Machinery
- Office equipment
- Farming equipment
- Scientific equipment

- Equipment must meet two specific criteria in order to qualify as a capital purchase.
- an acquisition value of at least $5,000 individually or combined in a “system” (unless part of a contract or grant where it specifically states equipment will be tracked at any value)
- a useful life expectancy of one year or greater.
Acquisition cost of movable Equipment:

- Examples of service cost that can be capitalized with equipment purchases may include:
  - Cost of assembling the asset
  - Cost of installation
  - Freight
  - In-transit Insurance
  - Preparing the site and asset for its intended use
The following are not considered capital equipment regardless of cost or useful life:

- Repair or replacement parts that do not significantly extend the useful life
- An item or substance that has no shape or identity, or loses that shape or identify upon detachment or removal from its original location
- Maintenance and Warranty agreements
- Training
- Software license agreements are not capitalized unless ownership is indicated within the license agreement.
- Any furniture items that are not modular and do not meet the capitalization threshold should be recorded as an expense
Identify whether the following are movable capital assets.
Decal number= assigned by Property Management during the purchase for “smart code” tracking.

First number on tag indicates title holder

2 and 3 = CSU owned
5 = Sponsor
6 = Federal
7 = Art
8 = Leased
9 = Department tracked

Asset number is system generated for the property record.

*you can use either to find the other
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CAM DOCUMENTS:
Edits
Loans
If training is down we will go into test
To go to the Asset Lookup Screen – Click the Asset link in the middle of the screen.
Asset Lookup

Any of the fields on this screen can be used to look up your asset property record.

Enter your search criteria then click search

Your asset record will display below
Using the “search” to find information

Notice several fields give you the option of “search” by clicking on the magnifier.
Asset Detail

These are the tabs that make up the Asset Record – Many fields in each of these tabs can be used to manage the asset.

<table>
<thead>
<tr>
<th>Asset Inquiry</th>
<th>show</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Detail Information</td>
<td></td>
</tr>
<tr>
<td>Asset Location</td>
<td></td>
</tr>
<tr>
<td>Organization Information</td>
<td></td>
</tr>
<tr>
<td>Payments</td>
<td></td>
</tr>
<tr>
<td>Payments Summary</td>
<td></td>
</tr>
<tr>
<td>Payments Lookup</td>
<td></td>
</tr>
<tr>
<td>Fabrication Information</td>
<td></td>
</tr>
<tr>
<td>Land Information</td>
<td></td>
</tr>
<tr>
<td>Asset Depreciation Information</td>
<td></td>
</tr>
<tr>
<td>View Asset Merge History</td>
<td></td>
</tr>
<tr>
<td>View Asset Separate History</td>
<td></td>
</tr>
<tr>
<td>View Retirement Information</td>
<td></td>
</tr>
<tr>
<td>View Equipment Loan Information</td>
<td></td>
</tr>
<tr>
<td>Warranty</td>
<td></td>
</tr>
<tr>
<td>Repair History</td>
<td></td>
</tr>
<tr>
<td>Components</td>
<td></td>
</tr>
<tr>
<td>Lookup Related Capital Asset Document(s)</td>
<td></td>
</tr>
</tbody>
</table>

326539 or 326504

326606

269949
CAM Processors will have the “actions” field available to them and from here we can begin our asset edits.
If you are unsure what account number to use please contact your fiscal officer for direction.

To transfer an asset to any department you will use the organization owner account number (default account for that department).

Clear existing account number.
Enter the department number then click search

- All accounts under that department will be listed at the bottom of the page

Click on the “organization code” and the next screen will give you that departments default account number.
This screen will pop up in a different window showing you the “Organization Default Account Number”. You can either type it into the first screen or find it in the list and click “return value”
By clicking “return value” on the previous screen, it will populate everything you need here.
Default Account Number Exercise

Find the default account for Surplus Property

1) Find the asset you want to transfer

2) Clear org account number and click on the magnifying glass to start your search

3) Enter the department number you are looking for in the organization code field

4) Click on any of the 4 digit department number links that appear in the records

5) Locate the organization default account number in the pop up window

6) Type or copy the default number into the account number field hit enter or select the correct account from the record then click return value
The “Asset Location” tab will contain the fields to change the building or room number.

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Campus</strong></td>
<td><strong>On Campus</strong></td>
</tr>
<tr>
<td>Campus: MC</td>
<td>Campus: MC</td>
</tr>
<tr>
<td>Building Code: 0150</td>
<td>Building Code: 0150</td>
</tr>
<tr>
<td>Building Room Number: B206</td>
<td>Building Room Number: B206</td>
</tr>
<tr>
<td>Building Sub Room Number:</td>
<td>Building Sub Room Number:</td>
</tr>
<tr>
<td><strong>Off Campus</strong></td>
<td><strong>Off Campus</strong></td>
</tr>
<tr>
<td>Name:</td>
<td>Name:</td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>City:</td>
<td>City:</td>
</tr>
<tr>
<td>State:</td>
<td>State:</td>
</tr>
<tr>
<td>Postal Code:</td>
<td>Postal Code:</td>
</tr>
<tr>
<td>Country:</td>
<td>Country:</td>
</tr>
</tbody>
</table>

Required fields: Building Code, Building Room Number, Building Sub Room Number.
The “Organization Information” tab will allow you to change the asset representative name.

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Inventory Name: FARMER, DELPHINE</td>
<td>Organization Inventory Name: FARMER, DELPHINE</td>
</tr>
<tr>
<td>Asset Representative Principal Name: Delphine - Farmer, Delphine Kasimir</td>
<td>Asset Representative Principal Name: Delphine - Farmer, Delphine Kasimir</td>
</tr>
<tr>
<td>Asset Representative Name: Farmer, Delphine Kasimir</td>
<td>Asset Representative Name: Farmer, Delphine Kasimir</td>
</tr>
<tr>
<td>Organization Text:</td>
<td>Organization Text:</td>
</tr>
<tr>
<td>Organization Tag Number:</td>
<td>Organization Tag Number:</td>
</tr>
<tr>
<td>Organization Asset Type Identifier:</td>
<td>Organization Asset Type Identifier:</td>
</tr>
<tr>
<td>Receive Date:</td>
<td>Receive Date:</td>
</tr>
<tr>
<td>Replacement Amount:</td>
<td>Replacement Amount:</td>
</tr>
<tr>
<td>Estimated Sale Price:</td>
<td>Estimated Sale Price:</td>
</tr>
</tbody>
</table>
Type in the information you do have and if you are unsure you can use the astrix symbol to fill in the blanks.

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Principal ID</th>
<th>Principal Name</th>
<th>Name Name</th>
<th>Entity ID</th>
<th>Campus Code</th>
<th>Primary Department Code</th>
<th>Employee ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>return value</td>
<td>16453</td>
<td>jamesdrenth</td>
<td>Drendel, James M</td>
<td>5925</td>
<td>MC</td>
<td>CO-1586</td>
<td>821311756</td>
</tr>
<tr>
<td>return value</td>
<td>44135</td>
<td>drenth</td>
<td>Drendel, Jesse William</td>
<td>18411</td>
<td>MC</td>
<td>CO-1874</td>
<td>827417221</td>
</tr>
<tr>
<td>return value</td>
<td>45301</td>
<td>drenth</td>
<td>Drenth, Jacob C</td>
<td>5927</td>
<td>MC</td>
<td>CO-8011</td>
<td>828457233</td>
</tr>
<tr>
<td>return value</td>
<td>2912</td>
<td>drennen</td>
<td>Drennen, Nancy Hungerford</td>
<td>5926</td>
<td>MC</td>
<td>CO-1574</td>
<td>823117415</td>
</tr>
<tr>
<td>return value</td>
<td>65626</td>
<td>drenth</td>
<td>Drenth, Rachel L</td>
<td>39092</td>
<td>MC</td>
<td>CO-6003</td>
<td>830157700</td>
</tr>
</tbody>
</table>
Asset Edit documents should also be used to input the routine maintenance or repair history on an asset. Under the “Repair History” tab you can record the incident date and problem (or procedure).

Remember to click on “add” otherwise the information will not be saved.
Initiation of the Equipment Loan/Return Document is **required** when:

- capital equipment is borrowed from CSU for more than 31 days
- OR
- the equipment resides at a location which is not directly associated with the university for more than 31 days

The document must be completed **before** the equipment is removed from the campus.

In the event the equipment has not returned to campus at the end of 2 years, a renew document can be submitted.
Prior to starting your loan document be sure to have:

- Name of borrower
- Contact address and phone
The “Equipment Loans” tab and “Borrower’s Address” tab must be completed.
Return LOAN DOCUMENT

To return a loaned asset, search for the asset and click on the return action.

You may also renew the existing loan if you have confirmed the representative will continue to use the equipment off campus.
Enter your description and the Loan Return Date, then submit the document.

A 2nd edit document is needed to update location and representative.
Confirm the current location and contact information is accurate, enter your description, and the new expected return date.
• Look up your department and choose an asset to transfer to your neighbor under their department number.

Be sure to update the:
  – Org account
  – Building and room
  – Asset Representative

(do not submit doc)

Your thermo cycler is in need of repair and the only certified tech is “Thermo-Repair” in Dallas Texas, to make matters worse they have a backlog of 6 months...

• Create an off campus loan to a non CSU entity for the duration of 6 months
Agenda

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WHAT IS A CAPITAL ASSET AND WHY DO WE HAVE THEM?

WHEN AND HOW TO DO:
Retirement Global
  • Trade in
  • External transfer
  • Lost
  • Theft
Cannibalize
Modify

HOW TO PULL AND READ REPORTS:
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Jasper inventory list

CAM DOCUMENTS:
Edits
Loans
From your main menu under “Lookup and Maintenance” click on “Asset Retirement Global.”
Click “search” to display the reason codes, and then click on the “return value” option to auto populate your selection.

### ASSET RETIREMENT GLOBAL

Below is a table of retirement reason codes:

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Retirement Reason Code</th>
<th>Retirement Reason Name</th>
<th>Retirement Reason Restriction Indicator</th>
<th>Active Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Credit</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Sold</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>2</td>
<td>Trade-in</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>return value</td>
<td>3</td>
<td>Lost</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>return value</td>
<td>4</td>
<td>Recycled</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>5</td>
<td>Cannibalized</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>6</td>
<td>Gift</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>7</td>
<td>Theft</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>return value</td>
<td>8</td>
<td>Destroyed</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>9</td>
<td>External Transfer</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>A</td>
<td>Auction (public surplus auction)</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Check Cancelled</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Asset Created in Error</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Retirement of Control Assets</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>J</td>
<td>General Error Correction</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>Merged</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Plant Fund Retirement</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>R</td>
<td>Rezied</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>Asset Separated Retirement</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
Trade-in

Similar capital equipment assets are traded in to obtain assets for the same general purpose, are of the same general type, and are employed in the same line of business.

The organization must give up something in return for a trade-in allowance and have it shown as a reduction to the total cost of a vendors invoice.

- Along with the requisition, the department must issue an *asset retirement document* for approval by Surplus Property prior to releasing any equipment.
- At no time is it acceptable to release property to a vendor without documented release approval by Surplus Property.
Attach documentation of Surplus approval to notes section along with req#.
A write off document will be requested by Property Management under certain circumstances:

- Assets unfound for 2 inventory cycles
  
  OR

- Assets that have been improperly disposed of by the department
Property Management will give permission to initiate a write-off document. Attach corrective action plan and include notes.
You must receive approval from Surplus Property prior to initiating a transfer. Attach documentation of approval to notes section.
Cannibalize vs Separate

Cannibalize
• When the removal of parts renders the equipment unusable

You take the optic light source from one endoscope and replace the one not functioning in another endoscope. (parts machine)

Separate
• When removal of parts still allows for the parts to function as separate assets

The boat and trailer were purchased together but the boat is totaled. You will be keeping the trailer for another use and it has a value greater than $5000
<table>
<thead>
<tr>
<th><strong>Replacement/Repair</strong></th>
<th><strong>Modify</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- When any part or component of the equipment has reached its useful life and will be replaced with a new version (regardless of cost)</td>
<td>- Increases utility and efficiency or significantly extends the useful life of an existing asset (regardless of cost)</td>
</tr>
<tr>
<td>The rotor(s) for the centrifuge has worn down and you are buying another one to replace it</td>
<td>The purchase of a specialized high powered lens for the microscope will allow an additional area of research</td>
</tr>
</tbody>
</table>
This patient monitor system is comprised of 7 interchangeable components including the rolling stand. You would like to purchase a specialized monitoring component. This one piece from Olympus costs $6730. Would this be a modify existing, replacement part or new asset.
Discussion
It comes to your attention one of the techs in your department has wires and hard drives and parts (oh my) in his workroom... The outer casing of some unrecognizable equipment has a decal on it. uh oh!
• What do you do now?

Dr. Brevard will moving to the University of Oregon at the end of February.
• Locate all assets assigned to him
• Transfer them to Oregon
  (be sure to include all applicable documents and approvals in the notes field)
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CAM DOCUMENTS:
Edits
Loans
Other common documents

- Transfer in
- Authorized Signer
- EACR

Department of Business and Financial Services

Property Management

Mailing Address: 6003 Campus Delivery
Physical Address: 555 S Howes St, 3rd Floor

Property Management records and tracks capital assets; calculates depreciation; and issue reports to management and sponsors. We also manage the physical inventory of capital and sponsor-owned assets, which includes meeting with department personnel and scanning all assets. We are the liaison with property auditors and provide guidance to departments, faculty, and staff regarding issues related to property administration and inventory.

Forms
- Add Equipment to the Property Management System
- Capital Equipment Checklist
- Corrective Action Plan
- EACR
- Information needed for Equipment Transferred In or Furnished by an outside Agency (Excel)
- Screening Certificates

Reports
- Capital Equipment Inventory Report Instructions
- Organization Equipment report for Capital Equipment Inventory
- Organization Equipment report for Capital Equipment Inventory - Excel
Use the “Add Equipment to the Property System” to include equipment you received from sources other than purchase or foundation gift.

---

### Add Equipment to Property System

This form is used for equipment that is either transferred in from another university/agency, furnished by a sponsor, or donated. Submit completed forms to Debra Ellison via e-mail at Debra.Ellison@Colostate.edu or campus mail at 6003 Campus Delivery.

**Transferred in by another company or agency:** Include a letter from the agency relinquishing the asset and a letter from the department accepting the asset.

**Equipment on lease to CSU by a sponsor, vendor, or Federal agency:** Include the contract.

**Donation to a CSU department directly but not sent through the Foundation. Donor will not receive a tax write off.**

**Contact Information:**
- **Name:**
- **Phone number:**
- **Department Receiving Equipment:**
- **Transferring or Donor Agency:**
- **Donating Agency (if applicable):**

### Equipment Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Year</th>
<th>Vendor</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Serial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building #</td>
<td>Room #</td>
<td>Asset Rep</td>
<td>Year</td>
<td>Vendor</td>
<td>Manufacturer</td>
</tr>
</tbody>
</table>

**For the Department to fill in:**

- **Additional Information for Leased Equipment:**
  - **Received date:**
  - **Return date:**

**For Property Management to fill in:**

- **Decimal number:**
- **PO:**
- **PO date:**
- **Org Account:**
- **Account:**
- **Object code:**
- **Asset type code:**
- **Owner:**

*An appraisal may be required for equipment transferred or donated. Appraisals can be requested from the Surplus Property Department or performed by a certified 3rd party. For leased equipment, list the cost on the contract.

**Expected date of receiving and estimated date of return for leased equipment:**

---

FY2013-14
“Property Accountability - Authorized Signers” tells us who you have designated for DPC and EACR signers. These forms should be updated biennially or whenever there is a change in the department.
## Equipment Accountability Change Request (EACR)

### Section 1: Type of Disposition
- Surplus Property
- Non-Capital Asset Trade-In (Provide Req #)
- Other (Provide Reason)

Additional Detail: Account number for re-allocation XXXXXX

### Section 2: Department Information
- Department Name: Property Management
- Department Number: 6003
- Contact Person Name: Rachel
- Contact Person Phone: 1-1045

Are all items available for pickup immediately? Yes

### Section 4: Equipment Details
- Equipment with a CSU Decal must be entered into Kealdi
  Please call Property Management or visit their website for details

### Section 6: Equipment List

<table>
<thead>
<tr>
<th>Serial Number</th>
<th>CSU Decal Number</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Item Description</th>
<th>Building Name</th>
<th>Room # or Location</th>
<th>Reason Code</th>
<th>Condition Code</th>
<th>Funding</th>
<th>Value</th>
<th>RU</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456-78</td>
<td></td>
<td>Casio</td>
<td>ms-80s</td>
<td>Adding machine</td>
<td>Howes business center</td>
<td>314</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>none</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>Box of binders</td>
<td>Howes business center</td>
<td>314</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>none</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>Electrical cords</td>
<td>Howes business center</td>
<td>314</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>abc-defgh-1</td>
<td>321123</td>
<td>Dell</td>
<td>precision 340</td>
<td>Computer (not in KFS)</td>
<td>Howes business center</td>
<td>314</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section 7: Authorization
- Rachel Drenth

**Please fill out this form electronically with as much information as possible.**

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**Equipment Accountability Change Request (EACR) Form**

[Image: EACR form with filled-in information]
The “Corrective Action Plan” can be found on our web page for departments that did not locate 100% of their Capital Assets during their inventory cycle.
The monitor at your station is finally being replaced by a bigger version later today!

- Locate the EACR document and Surplus the monitor at your station

The new professor in your building is always coming back from trips with equipment donations!
He can talk the GPS unit right out of the hand of the guy he met at the airport

- Locate and fill out the form to add this to your property equipment record
Agenda

PDF DOCUMENTS YOU OCCASIONALLY NEED TO KNOW HOW TO FILL OUT:
- Transfer in document
- Action plan for Inventory Reconciliation
- Authorized signers form
- EACR’s

WHAT IS A CAM PROCESSOR AND WHY DO WE DESIGNATE THAT AUTHORITY?
Responsibility for capital assets
Department Property Contact role and responsibilities

WHAT IS A CAPITAL ASSET AND WHY DO WE HAVE THEM?

WHEN AND HOW TO DO:
- Trade in
- External transfer
- Retirement / Retirement global
- Cannibalize
- Modify Existing

HOW TO PULL AND READ REPORTS:
- Loan Report
- Loaned by Sponsor
- Maintenance report
- Jasper inventory list

CAM DOCUMENTS:
- Edits
- Loans
Loan Reports:
Sent to the CAM processor and Asset Representative for all outstanding loaned assets due within the calendar month. A PDF attachment will be with the email and several individual departments are represented on their own page.

Scroll through the pages to find your department and the assets requiring attention.
Property management keeps a record of all assets loaned to the University with their expected return dates.

* We will contact the CAM Processor and the Asset Representative within 90 days of the expiration to ascertain the status.
MATC. MAINTAIN. REPORT

Similar to the loan report, the CAM Processor and the Asset Representative will receive an e-mail with a PDF attachment. Pull up the page for your department to view assets behind on their maintenance.

-----Original Message-----
From: JasperReports
Sent: Friday, November 15, 2013 6:30 AM
To:
Subject: Federal property requirement – record maintenance for capital equipment

This is a system-generated email to inform you that Federal Acquisition Regulation (FAR) part 52.245-1, “Government Property,” requires stewards of federal property to have a property maintenance program in place to enable the identification, disclosure, and performance of normal and routine preventative maintenance and repair of federal property. Departmental custodians, such as Principal Investigators (PI), are responsible for ensuring maintenance is performed on their capital assets. This email is intended to make you aware that there is a central location within the Kuali Capital Asset Management (CAM) Database to record maintenance and repair history for capital assets.

If you are receiving this email there is Federal or Conditional titled equipment listed within your Department and you are either the responsible party listed on the asset record or the Department Property Contact (DPC) for your Department. Please review the attached report which details the assets with FED or COND title on an active 53 account. Also attached are document instructions for the Repair History tab on the asset record. This is where maintenance can be entered on the asset record. Please contact the Property Management Office at 491-2040 for any help updating your asset record. Please contact your Senior Research Administrator with any questions or concerns about the contract, grant, or agreement.

If you are no longer the responsible party for this equipment or the DPC for the Department please contact the Property Management Office in order to update the information that is on file. We appreciate you keeping your asset records up to date!
Jasper Inventory

Department of Business and Financial Services

Property Management

Mailing Address: 6003 Campus Delivery
Physical Address: 555 S Howes St, 3rd Floor

Property Management records and tracks capital assets; calculates depreciation; and issue reports to management and sponsors. We also manage the physical inventory of capital and sponsor-owned assets, which includes meeting with department personnel and scanning all assets. We are the liaison with property auditors and provide guidance to departments, faculty, and staff regarding issues related to property administration and inventory.

Forms
- Add Equipment to the Property Management System
- Capital Equipment Checklist
- Corrective Action Plan
- EACR
- Information needed for Equipment Transferred In or Furnished by an outside Agency (Excel)
- Screening Certificates

Reports
- Capital Equipment Inventory Report Instructions
- Organization Equipment report for Capital Equipment Inventory
- Organization Equipment report for Capital Equipment Inventory - Excel
**Reports**

**Jasper Inventory**

**Excel: Organization Equipment Report**

- Inventory Start Date: 2013-07-01
- Select an asset tag number
- Select an organization: 0001 | Board of Governors of CSU System
- Select a name
- Select a building code
- Select a room number
- Select a manufacturer
- Select a manufacturer's model number
- Active assets only? Yes
- Found & Not Found: Checked Out
- Sort by Org, Tag number within: All

**WARNING!** Failure to input selection criteria will produce a huge report that will run a long time.
**Report lookup activity**

**Odd Years**
- 100
- 1000
- 1200
- 1300
- 1500
- 1700
- 4000
- 6000
- 7000
- 8000

**Even Years**
- 1100
- 1400
- 1600
- 1800
- 2000
- 3000
- 5000

- Tell me the % inventory found in your department during your current inventory cycle
- How many assets do you have and how many were located?
Property management is here to support your department. We are happy to provide one on one or group training within your department.

Upcoming training will include:
• APO and DPC certification
• Online interactive training
• Webinar and or go to meeting
Property Management Contact Info

- Website: [http://busfin.colostate.edu/prp.aspx](http://busfin.colostate.edu/prp.aspx)

Property Management Department:
- Genevra Scott (491-2040)
- Debra Ellison (491-2270)
- Mack Freestone (491-1358)
- Rachel Drenth (491-1045)

Questions?