

CSU PROPERTY MANAGEMENT



EQUIPMENT ACCOUNTABILITY CHANGE REQUEST PROCESS

September 2008

WHY IS IT IMPORTANT TO FILL OUT AN EACR?

Colorado State University is responsible for managing all assets from their purchase to their disposal. This is part of being accountable to the taxpayers and showing good stewardship of the assets their funds provided. No matter how little value you might think something has it still needs to go through the EACR process and be sent to surplus. It is especially important that capital assets get put on EACR's when they are to be disposed. A capital asset is typically a non-expendable, moveable asset, with a useful life of more than one year that was purchased



for more than \$5,000 (although some funding sources require a \$1,000 threshold). These assets will have a CSU decal like the one at left and are tracked by our inventory specialists. If a capital asset is disposed without doing the proper paperwork it draws out the inventory process while we have to figure out what happened to the asset. It also necessitates extra paperwork to "write-off" the asset. It is extremely important to fill out the entire form accurately. If you do an EACR form for a capital

asset but do not include the CSU decal number or serial number then our office has no way of knowing that you are disposing of a capital asset and the next time an inventory is done in your department, we will still be looking for that asset. (It is also important to note that bad handwriting can cause us to miss things as well so it is recommended that you type your EACR forms whenever possible!)

NEW FORMS

We have developed new forms to use when surplussing equipment, checking it out to an off-campus location, changing its on-campus location or transferring it to another department's responsibility. These forms are available on our website: <http://busfin.colostate.edu/prp.aspx>. The most notable change is that the location/responsibility option is no longer on the main EACR form and has been split into its own form. These new forms, when filled out correctly, help us to speed up the processing of your EACR by giving us all the information we need more efficiently. **Also, please note that Property Management no longer accepts faxed EACR's and must receive the original through campus mail or hand delivery.**

To Make Your EACR Experience Better:

- SEND THE ORIGINAL EACR FORM TO OUR OFFICE (DO NOT FAX!)
- TYPE YOUR EACR FORM IF AT ALL POSSIBLE
- USE THE NEW EACR FORMS (FOUND ON OUR WEBSITE)
- DON'T SEND COPIES OR DUPLICATE FORMS
- PLAN AHEAD!

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Equipment Accountability Change Request Procedures



A capital asset is typically a non-expendable, moveable asset, with a useful life of more than one year that was purchased for more than \$5,000.

“WHEN PLANNING TO SURPLUS EQUIPMENT IT IS IMPORTANT TO THINK AHEAD!”.



It is a good idea to arrange to store surplus items in a location where they are not blocking hallways, etc. and can be locked up.

EACR PROCESSING

When we receive your EACR form in our office, the first thing checked for is an authorized signature. It is important to ensure that your department has an updated signer sheet on file in our office. (Please contact Debra Ellison at 491-2270 to get a copy of the signer sheet.) If the form has not been signed by someone on that sheet it must be sent back to you for a new signature. This drags out the EACR process creating a longer wait for you! The

next thing Property Management does is to check title and funding to ensure that you are authorized to dispose of the assets in question. If in fact you are disposing of an asset that is titled to a sponsor or the federal government you may be required to obtain permission for disposal before we can approve your form. Once your form has been approved by our office we assign a lot number to it and send it over to central receiving.

If the form has been filled out correctly there is typically a two day turnaround time for our office to get the form over to Central Receiving. Central Receiving will then schedule your pick-up which can take several weeks.

PLANNING AND SAFETY

When planning to surplus equipment it is important to think ahead. You should plan on at least 1-2 weeks passing from the day you send us the EACR before your equipment is picked up. It can take much longer than this if we need to send the form back to you for any reason. We get many requests to rush forms and the simple fact is that while we try to accom-

modate, it doesn't always fit into Central Receiving's schedule. We simply cannot rush every form that comes through and there are no guarantees! One problem that is frequently encountered is that surplus items are left in an area that poses a potential fire or safety hazard or that leaves the equipment vulnerable to theft. If at all possible it is a good idea to

arrange to store surplus items in a location where they are not blocking hallways, etc. and can be locked up. If capital assets waiting for surplus are stolen then you will need to file a police report for them as well as complete additional paperwork for our office to record the theft and properly dispose the asset.

WHAT IS A LOT NUMBER?

A lot number is a four digit number that is assigned to every EACR form by Central Receiving and is used to track that form in our office as well as at Central Receiving. If you happen to have a situation in which you need information from Central Receiving about why the equipment on a certain EACR form was

not picked up or are wondering when it might get picked up you will need to first call our office (either 491-1045 or 491-2270) and get the lot number for that particular form. You can then use that lot number to reference the EACR with Central Receiving to get the information you need. Your contact in Central

Receiving is Betsy Dickinson who can be reached at 491-2736.

SCIQUEST TIPS

When setting up a requisition in Sciquest, please check for any items that may be considered Capital Equipment. Capital Equipment is defined as items that have an individual acquisition cost that is greater than \$5,000.00 or other threshold amounts as set by contract, agreement, or grant (53 funds). They have a useful life of more than a year, are not expendable and are not a part of a building. Items under \$5,000.00 that will be combined together, to make up one piece of equipment totaling more than \$5,000.00, will also be considered Capital Equipment. Shipping costs, training costs, installation costs, and up to 1 year of maintenance should all be included in the price of an

If you have a requisition with both Capital and Non-Capital items, you will need to use line funding. You can set up your requisition with header funding, but on the Capital Equipment line(s), you will need to put the funding with the appropriate sub code on the line or lines that are Capital Equipment. If you are combining items to make up one piece of capital equipment, please provide what items will be combined so we can correctly identify what item or items will need to be decaled. You can put this information in the notes section. Also, please provide a description in the description section. It will help us identify what it is you are purchasing. If you are order-

ing for a different department, we also need to know that. Sciquest usually defaults to the department of the person entering the item(s). Even though the shipping information gives the department, the general information sets up the responsible department. When replacing an inoperable or outdated part or updating a current item, please reference the decal number of the item it will be going on in the notes of the requisition. The sub code for repair parts is 3450. Otherwise, the sub code will have to match the original piece of equipments sub code if it is an add-on or upgrade. If you are replacing an item completely, we will create a new decal for that item. (Just a

item. For example; if you have a computer that costs \$4,700.00, support for one year costs \$250.00 and shipping is \$100.00, you now have a total cost of \$5,050.00 and it becomes capital equipment and is all sub coded as such. Software stands alone and software has a \$100,000.00 threshold. If the support is on software and the software is capital equipment, the support sub code should also be capital equipment. If the support is over 1 year, it will not be included in the cost. If you have Capital Equipment, please select the appropriate sub code for the funds you are using. Generally; 53 funds, 77 funds and 021 funds require specific sub codes. There are restrictions

on splitting funds for those accounts. You may not purchase Capital Equipment on a 21XXXX account, but must use a 021XXX account and get prior approval from the Campus Service Accountants (They will provide you an EAR #). Vehicles also require specific sub codes, depending upon the funding.

reminder, if you are trading-in or disposing of an item, an EACR is also needed and the requisition number needs to be provided on the EACR for all trade-ins). Finally, if your requisition is approved by Property Management and then changes are made, Property Management will not see it again until it becomes a Purchase Order. Please check the sub codes and funding if the change results in a new price where it is now over or under \$5,000.00.



When setting up a requisition in Sciquest, please check for any items that may be considered Capital Equipment.

“IF YOU ARE COMBINING ITEMS TO MAKE UP ONE PIECE OF CAPITAL EQUIPMENT, PLEASE PROVIDE WHAT ITEMS WILL BE COMBINED SO WE CAN CORRECTLY IDENTIFY WHAT ITEM OR ITEMS WILL NEED TO BE DECALED.”



Items under \$5,000.00 that will be combined together, to make up one piece of equipment totaling more than \$5,000.00, will also be considered Capital Equipment.



BUSINESS AND FINANCIAL SERVICES

CSU PROPERTY MANAGEMENT

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<http://busfin.colostate.edu/prp.aspx>

TRANSFER EACR PROCEDURES

The process to transfer assets to another university when a professor is leaving can be quite involved and confusing. It involves some upfront communication with several departments before the formal paperwork process begins. Outlined below are the basic steps that need to be followed when doing this type of transfer.

1) The first issue to consider is whether CSU can benefit from use of the assets in other areas of the campus. The transfer of equipment should never set off a chain of events which requires a new purchase on our campus.

2) Assets purchased with 53 funds will have contractual obligations applied to them. You will need to check with Sponsored Programs to make sure you are satisfying these.

3) You will need to consult with Betsy Dickinson (491-2736) of Central Receiving to determine fair market value for the assets. For some older assets it actually saves CSU money to transfer rather than dispose of the assets. These assets can be transferred to the other institution at no expense to CSU. The other institution then becomes responsible for the cost of disposal. Central Receiving must approve all dispositions and/or removals from campus. Their assessment of the assets to be transferred will count as their approval of the disposition.

4) You will need a letter of release from your department stating that you release the assets to the other University.

5) You will need a letter of acceptance from the other University stating that they

accept responsibility for the assets and agree to pay whatever price Central Receiving has set for them. The other University will also need to be responsible for any shipping/movement costs to get the assets transferred to their facility.

6) You will need to fill out an EACR form for the assets (found at <http://cr.colostate.edu/documents/EditableEACRForm.pdf>). Mark the "Transfer to Other Agency" box and **make sure that the form is signed only by your department head.** (This counts as department head approval of the transfer!)

7) If the assets to be transferred are on open 53-fund account you will need to get VP of Research approval. Your contact for this is Bill Farland.