Asset Transfer to Surplus Job Aid

The Asset Transfer to Surplus request is used to transfer items to Surplus Property. Surplus Property is property that exceeds the University's needs and is not required for the University's foreseeable needs. The term includes used or new property that retains some usefulness for the purpose for which it was intended or for another purpose.

The Asset details page has three panels:

- The **Asset Details panel** has the selected asset's current information including the asset classification, location, and custodian.
- The **Activity Type panel** determines the asset disposition. The information requested will change depending on the activity choice.
- The **Comments panel** is used to enter any necessary details about the asset change and is required for Transfers to Surplus.

Steps to Submit Transfer to Surplus

1. Navigate to the Asset Change Request page**: NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request.**

2. Click the **Add a New Value** button.

3. Enter Business Unit **UTARL**

4. Enter the **Tag Number**.

5. Click **Add**

Note: *The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.*

Asset Change Request

Add a New Value   🔍 Find an Existing Value

Transaction ID NEXT
Business Unit [ ] 🔍
*Asset Identification [ ] 🔍
Tag Number [ ] 🔍

Add

6. Click the radio for **Asset Transfer to Surplus.**

Asset Change Request

Asset Details

Transaction ID: 0000040865	Approval Status: Initial
Business Unit: UTARL	Principle Investigator:
Asset ID: 100000011895 LAPTOP DELL LATITUDE 7490	Asset Tag Number: 123608
Financing Code	Building Sector
Location: 642-213 University Administration Bldg	642_213 213
Location Eff Date: 05/01/2023	Project ID:
Department: 340301 OIT Learning and Comms	Start Date End Date
Current Custodian: 1001234567 Trinity, River	Profile ID: 284CTL41
Cust Eff Date: 05/01/2023	Serial ID: 2F9JNQ2
Asset Class: 284 Portable CPU (Not Apple)	Acquisition Date: 08/01/2018 Acquisition Code Purchased
Requester: 6001234567 Maverick, Sam	
Asset Title:	

Activity Type

◯ Asset Transfer   ◯ Asset Removal   ◯ Asset Return   ◉ Asset Transfer to Surplus

Sanitization Date: 03/27/2024 📅
Sanitization Method: Factory Res ⌄
Date of Surplus: 03/28/2024 📅   Building   Sector
               662_110   110
New Location: 662-110   Wetsel Service Center
Custodian Transfer Date: 03/28/2024 📅
Surplus Department ID 320506   Surplus Property
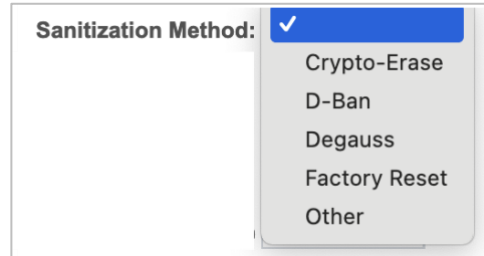
Comments

Enter Required comments here

Save   Submit

Date Time: 03/28/2024 11:12 AM   Status: Initial   Updated by: Maverick, Sam
Transferring to surplus.

7. Enter the **Sanitization Date.**

   a. This is typically today's date or the date the ASSET was sanitized (*please coordinate with IT to have the HD erased.*

8. Click the drop-down arrow to Search for the **Sanitization Method.**

   a. **Crypto-Erase**

   b. **D-Ban**

   c. **Degauss**

   d. **Factory Reset**

   e. **Other**

9. Enter the **Date of Surplus**. (today's date)

10. The New Location (Surplus Location ID) will default to 662-110. (no change needed).

11. The Surplus Department ID will default to 320506. (no change needed).

12. Enter required **Comments:**

    a. Cost center or Project to charge for the HD destruction.

    b. Will drop off at the dock or please schedule a pick-up.

Note: *The comments will disappear from the Comments box and move below the box with a date/time stamp, the name of who made the asset update, and the comments if entered.*

13. Click the **Submit** button to submit to Workflow Approval. Once submitted a transaction ID will be assigned and the workflow approvals display.
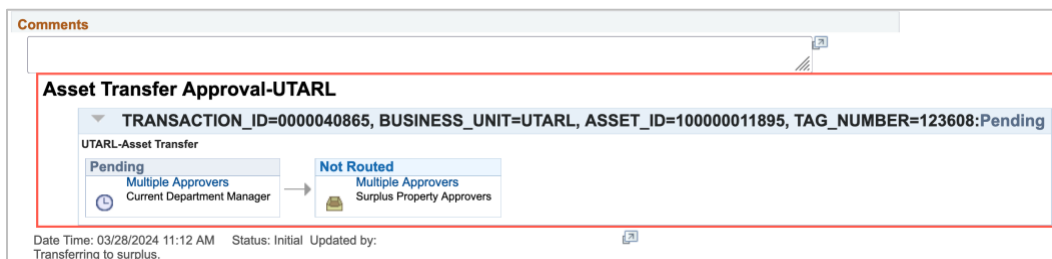
Note: *The approvals vary depending on the type of asset and other factors. At times the PI, Auto Shop, Facilities Management, and Grants and Contracts may be in the workflow in addition to the Department Head and Inventory/Distribution Services.*