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.

6. Click the radio for **Asset Transfer 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.