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Typographic Conventions in Oracle Application Navigation Paths
This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:
1. (N) From the Navigator window, select Invoice then Entry then Invoice Batches Summary.
2. (M) From the menu, select Query then Find.
3. (B) Click the Approve button.

Notations:
(N) = Navigator
(M) = Menu
(T) = Tab
(B) = Button
(I) = Icon
(H) = Hyperlink
(ST) = Sub Tab
Section Objectives
At the end of this section, you should:

- Understand the definition of "Equipment Fixed Asset."
- Understand the importance of charging to the correct Expenditure Type.
- Understand the role of the Central Fixed Assets Accounting Office in maintaining Fixed Assets.
- Understand the role of the Property Contact in maintaining Fixed Assets.
- Know how to obtain Fixed Assets information using Discoverer reports.
Fixed Asset Definition
An "Equipment Fixed Asset" is an item that has a useful life of more than one year and a unit cost of more than $5,000. The FA Viewer manual refers to "Fixed Assets" and "Capital Equipment" interchangeably.

System Overview

The Fixed Assets module is integrated with the Purchasing and Accounts Payable, Grants Management, Human Resources, and the General Ledger modules. Purchase orders and invoices coded with the equipment Expenditure Types that include "Eq Capital" in the description are sent to the Fixed Assets Module.

The Fixed Assets Accounting Office reviews invoice information, tags equipment assets, collects additional information not included on the invoice; then, adds assets to the IS Fixed Assets module. Gifts of equipment and equipment on loan from Federal sponsors of research are also recorded in the Fixed Assets module. The University depreciates all its fixed assets and reports them in its Annual Financial Statements.
Fixed Assets Viewer

Fixed Assets Accounting inventories capitalized equipment every two years and retires equipment from the Fixed Asset system when it is disposed, (surplused, traded-in, stolen, etc.)

Importance of Correct Expenditure Type

Departmental Property Contacts (FA Viewers) may or may not also have the IS responsibility for departmental purchasing. Those who do have PO Purchaser or PO Requester responsibilities must understand the critical importance of selecting the correct PTAEQ Expenditure Type value to categorize their equipment purchases.

The 'Expenditure Type' (‘E’ segment of PTAEQ) assigned to a piece of equipment is the core data element for fixed asset reporting. Using the correct equipment Expenditure Type and creating accurate equipment descriptions when purchasing equipment is crucial in properly identifying capitalized equipment in the Integrated System. If the original Expenditure Types are wrong, cost transfers must be done in the Grants Management module to correct them.

The Fixed Assets Accounting Office is prepared to help departments answer any questions they may have about selecting correct Expenditure Types and creating accurate equipment descriptions.
Central Office Responsibilities

The Central Office Fixed Assets Accounting Office is responsible for:

- Management, oversight, and reporting for all University equipment assets
  - Annual Financial Statements
  - Annual report in September of each year
  - Annual report to SCHEV in October of each year
  - Final sponsor property reports
  - Annual report to Budget Office for ETF Allocation Analysis
- Administering the IS Fixed Asset Module
- Attaching bar-coded tags to all new capitalized equipment assets acquired by the University
- Collecting information on existing, tagged capitalized equipment with bar code scanners
- Conducting a biennial inventory of University equipment
- Approval of asset retirements: scanning surplus equipment, etc.
Property Contact Responsibilities

As the departmental Property Contact you have 3 primary responsibilities:

- Provide information to the Central Office Fixed Assets Accounting Group for ALL equipment related activity.
- Review equipment inventory reports discussed in Chapter 3 to ensure that your organization’s equipment is properly accounted for.
- Stay current on equipment policies and procedures:

Though IS has provided different tools and some changes in procedures, departmental responsibilities for Fixed Assets have not changed. You will continue using:

1) Form P-1, Equipment Inventory Change Request (example in Chapter 5, Form 1) to notify Property Accounting of all equipment related events such as:
   - Equipment location has permanently changed
   - Equipment is missing or stolen
   - Equipment traded-in
   - Equipment has been disposed or destroyed.

2) Form P-2 Off-Grounds Equipment Certification for all equipment maintained off-campus.

3) Form – Inventory Certification Form which confirms the inventory status of missing equipment.

Departments, through their Property Contacts (FA Viewers), will:

- Continue to provide information to the Central Office Fixed Assets Accounting Staff on all equipment related activity.
- Assist in performing the biennial inventory of University equipment.
Role of the Property Contact

- Review equipment inventory reports to ensure proper accountability for your organizations' equipment.
  - Individuals who have the Fixed Asset Viewer responsibility can retrieve information on their departments' capitalized equipment from the Operational Data Store (ODS) with Discoverer reports.

- Stay current on equipment policies and procedures by
  - Call or email Fixed Assets Accounting staff with questions (email: phone contact information appears later in this chapter.)
Annual University Level Reports

Accurate Equipment Data is Crucial

The Fixed Assets Accounting Office must provide annual input to a variety of university-level reports independent of the inventory process. The accuracy of equipment information may have a positive or negative impact on allocation of equipment resources from the state, participation in some sponsored programs, or the overall assessment of the university’s fiscal health. The list below identifies the major, annual reports, which require continuously accurate information on departmental capitalized equipment.

- Sponsor Annual Report in September of each year
- Annual Report to SCHEV in October of each year
- Final Sponsor Property Reports
- Annual Report to Budget for ETF Allocation Analysis
- Annual Financial Statements

Bear in mind that these are only a few of the total reporting requirements for equipment that must be fulfilled. For this reason, it is very important that Property Contacts stay abreast of all equipment actions in their departments.
The Inventory Process

Completing the University’s process for inventory of capitalized equipment generally requires two years. The basic process is the same for all departments:

- The Fixed Assets Staff scans the equipment in an organization
- The Property Contact is notified that the scan is complete and directed to run the Discoverer IS.FA_Equipment Found or Missing Report to see which items the Fixed Assets Accounting staff could not find or account for.
- Departments exhaust all possible measures for finding missing equipment and inform Fixed Assets Accounting of the results of the search.
- The Fixed Assets Accounting Staff returns to scan equipment that was found and records equipment verified to be off grounds.
- Remaining equipment not accounted for is considered missing and an Inventory Certification Form (example in Chapter 5, Form 3) must be completed.
Adding and Deleting Equipment

Adding Equipment
Equipment is added to the Fixed Assets module in these four ways:
1. Purchase of $5,000 or more made in the Purchasing Module (PO/AP).
2. Cost Transfers
3. Gifts in Kind
4. Transfers In from sponsors or other universities

Deleting Equipment
Equipment is deleted from the Fixed Assets module in these five ways:
1. Surplus: Use the E-Form Request to Surplus:
   www.procurement.virginia.edu/Surplus
2. Release to other Institutions or sponsors - Attach a written explanation from the Principal Investigator (PI) to the completed Form P-1.
3. Trade-In: Use Form P-1 and include the Purchase Order number.
4. Cannibalization - Use Form P-1
5. Stolen - Use Form P-1
Property Contact Policies and Assistance

A summarized list of University policies and procedures pertaining to capitalized equipment and property can be found in the appendices to this manual.

Fixed Assets Accounting Staff Contacts

Fixed Assets Accounting staff can be contacted for assistance as shown in the following table:

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gary Young</td>
<td>Director</td>
<td><a href="mailto:gdy4f@virginia.edu">gdy4f@virginia.edu</a></td>
<td>924-4284</td>
</tr>
<tr>
<td>Malika Ouenza</td>
<td>Mgr of Plant Acctg</td>
<td><a href="mailto:mo4x@virginia.edu">mo4x@virginia.edu</a></td>
<td>924-4283</td>
</tr>
<tr>
<td>Angy Seago</td>
<td>Mgr of ETF &amp; Equip</td>
<td><a href="mailto:seago@virginia.edu">seago@virginia.edu</a></td>
<td>924-4323</td>
</tr>
<tr>
<td>Mike Williams</td>
<td>Inventory Specialist</td>
<td><a href="mailto:mww5w@virginia.edu">mww5w@virginia.edu</a></td>
<td>924-4209</td>
</tr>
<tr>
<td>John Wallace-Smith</td>
<td>Sr Property Specialist</td>
<td><a href="mailto:jaw3b@virginia.edu">jaw3b@virginia.edu</a></td>
<td>924-0805</td>
</tr>
</tbody>
</table>

Information Available

Equipment information is organized into three major groups:

* Descriptive: consists of asset description, serial number, model number, asset tag number, and other information that describes the asset. If the equipment item was funded from ETF, the SCHEV reference number, APR number and lease year can also be found.
• **Assignment:** displays the name of the UVA employee responsible for the equipment; for example, a principal investigator or fiscal administrator, and the location. The responsible person must be a current employee. The 'Location' FlexField breaks down the asset's location into five segments: building, floor, room, city, and state. Building, floor, and room numbers are the same as those found in the Facilities Management Space Inventory System.

• **Financial:** includes the original cost, current cost (reflects any added costs), the date the asset was placed in service and depreciation taken on the asset. If the asset was purchased you can view information passed from the Accounts Payable/Purchasing module such as invoice and purchase order numbers, vendor, and the PTAO that paid for the equipment.

**Classifying Assets**

UVA assigns each equipment item to a category. The equipment category includes these three segments:

• **Ownership:** classifies the asset as belonging either to UVA or UVA at Wise, and whether or not the University owns it. Some equipment titles are retained by sponsors of research and are not owned by the University.

• **Major category:** classifies assets in major groupings such as equipment versus buildings

• **Minor category:** classifies the asset by detailed type such as microscope versus laser
**Viewing and Reporting**

Departmental property contacts will use **Discoverer reports** from the Operational Data Store (ODS) to see information necessary for participating in the inventory process and monitoring capital equipment. The chapter in this manual titled "Viewing and Reporting Methods" will provide details on the use of the Discoverer reports.
Viewing and Reporting Methods

Chapter 2
Section Objectives

At the end of this section you should be able to find Fixed Asset information with Discoverer.
Discoverer Reports
Information in the Operational Data Store (ODS) can be displayed in Discoverer worksheets. For example, you can query for all equipment charged to particular PTAOs, located in selected buildings, or owned by various organizations.

There are several Fixed Assets Pre-Defined Reports (PDR) available in the ODS to be run in Discoverer. The key reports most departments may find useful are:

- IS.FA_Equipment Found or Missing Report.DIS - Most Important
- IS.FA_Fixed Asset Detail Report.DIS
- IS.FA_Fixed Asset Assignment Report.DIS
- IS.FA_Fixed Asset Invoice Report.DIS
- IS.FA_Asset Clearing Account Recon Report-Detail.DIS

The first report is your primary accountability tool with which you will help the Fixed Assets Accounting Staff complete the biennial inventory. It contains mostly descriptive and information to establish responsibility for the equipment. It does not contain cost data for the equipment.

The other reports provide more details including cost data, individual responsible for the equipment, and reconciliation data to help you track equipment that may be shared or paid for by more than one organization in your department.

When you open Discoverer to the Operational Data Store (ODS) database you may find other Fixed Assets reports (beginning with IS.FA) in the list. Those with the word *detail* in the title are more likely to be of use to you in tracking your fixed assets.
Equipment Found or Missing Report

A Pre-Defined Report, IS.FA_Equipment Found or Missing Report.DIS, has been prepared to help you keep track of fixed assets in your department. This is the report Property Accounting will ask you to run after they have scanned your inventory of fixed assets. It will show you which items were found and which are still missing.

Opening the Report

After logging into the VPN, opening Discoverer, and selecting the report from the database list; the Parameter Wizard in the preceding screen shot will appear. The first two parameters must be keyed in exactly the same format shown in the screen shot. The 'Enter Equipment Status' parameter is a toggle between 'Found' and 'Missing.' Click the downward pointing arrow at the right of the field to select the desired parameter.
Equipment Found or Missing Report

The report appears as shown in the preceding screen shot. It includes the data found in these fields:

- **Description**
- **Condition**
- **Asset Tag Number**
- **Responsible Org**
- **Serial Number**
- **Responsible Person**
- **Manufacturer**
- **Building**
- **Comments**
- **Floor**
- **Model Number**
- **Room**
- **New / Used**
- **Inventory Taker**
- **In Use**
- **Inventory Date/Time**

**Note:** Cost data is not included in this report. See Fixed Asset 'Detail' reports for cost data.
User Tip

To create a list of all assets in your organization with the IS.FA_Equipment Found or Missing Report.DIS simply change the 'Enter Date' Parameter to tomorrow's date (or any later date) and change the 'Enter Equipment Status' parameter to 'Missing.'
Summary

- You should now be able to use Discoverer to find Fixed Assets information in the Operational Data Store (ODS).
Appendices - FA Viewer

Chapter 3
## Appendix 1: Capital Equipment Expenditure Types

<table>
<thead>
<tr>
<th>Capital Expenditure Types</th>
<th>Non-Capital Expenditure Type</th>
<th>Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unit Cost &gt;/=$5,000</strong></td>
<td><strong>Unit Cost &lt;$5,000</strong></td>
<td></td>
</tr>
<tr>
<td>Eq Capital Aircraft</td>
<td>Eq NonCapital Aircraft</td>
<td>Equipment for airplanes, helicopters, and similar aircraft equipment</td>
</tr>
<tr>
<td>Eq Capital Built-In</td>
<td>Eq NonCapital Built-In</td>
<td>Equipment for benches, laboratory tables, platforms, shelving, stages, wall cabinets, and similar built-in equipment normally included during construction as special stationary features</td>
</tr>
<tr>
<td>Eq Capital Comp Software</td>
<td>Eq NonCapital Comp Software</td>
<td>Equipment for the purchase of packaged or tailor-made application software, systems software, and utility programs</td>
</tr>
<tr>
<td>Eq Capital Construction</td>
<td>Eq NonCapital Construction</td>
<td>Equipment for air hammers, backhoes, bulldozers, cranes, graders, portable generators, pumps, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Desktop Comp</td>
<td>Eq NonCapital Desktop Comp</td>
<td>Equipment for stationary desktop or tower computers</td>
</tr>
<tr>
<td>Eq Capital Dev Tools Purch</td>
<td>Eq NonCapital Dev Tools Purch</td>
<td>Equipment for purchases of software development tools such as test editors, compilers, build-automation tools and debuggers</td>
</tr>
<tr>
<td>Eq Capital Educational</td>
<td>Eq NonCapital Educational</td>
<td>Equipment for auditorium seating, chalkboards, classroom furniture, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Electronic</td>
<td>Eq NonCapital Electronic</td>
<td>Equipment for intercommunication systems, radar, radios, televisions, and similar electronic equipment</td>
</tr>
<tr>
<td>Eq Capital Exhibit</td>
<td>Eq NonCapital Exhibit</td>
<td>Equipment for artifacts, art works, scientific paraphernalia, and similar museum materials and equipment</td>
</tr>
<tr>
<td>Eq Capital Field</td>
<td>Eq NonCapital Field</td>
<td>Equipment for portable and/or permanent nondisposable equipment, such as automatic samplers and ambient air/water meters or analyzers, designed and purchased primarily for use in non-laboratory settings</td>
</tr>
<tr>
<td>Eq Capital Household</td>
<td>Eq NonCapital Household</td>
<td>Equipment for beds, bureaus, chairs, dressers, heaters, mattresses, refrigerators, stoves, tables and portable fire extinguishers</td>
</tr>
<tr>
<td>Eq Capital Laboratory</td>
<td>Eq NonCapital Laboratory</td>
<td>Equipment for blood gas analyzers, bunsen burners, centrifuges, freezing point depression instruments (freezer and refrigerators), gas chromatographs, incubators, microscopes, spectrophotometers, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Law Enforcement</td>
<td>Eq NonCapital Law Enforcement</td>
<td>Equipment for clubs, firearms, helmets, shields, surveillance apparatus, and similar law enforcement use equipment</td>
</tr>
<tr>
<td>Eq Capital Library</td>
<td>Eq NonCapital Library</td>
<td>Equipment for microfiche and similar equipment used in libraries of institutions of higher education</td>
</tr>
<tr>
<td>Eq Capital Mainframe Comp</td>
<td>Eq NonCapital Mainframe Comp</td>
<td>Equipment for mainframe computers or components and peripherals used on a mainframe computer</td>
</tr>
<tr>
<td>Eq Capital Manufacturing</td>
<td>Eq NonCapital Manufacturing</td>
<td>Equipment for drills, lathes, looms, presses, saws, stampers, and similar manufacturing use</td>
</tr>
<tr>
<td>Capital Expenditure Types</td>
<td>Non-Capital Expenditure Type</td>
<td>Long Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>Eq Capital Mechanical</td>
<td>Eq NonCapital Mechanical</td>
<td>Equipment for air conditioners, boilers, elevators, switching, and similar mechanical equipment normally included in a structure at time of construction</td>
</tr>
<tr>
<td>Eq Capital Medical &amp; Dental</td>
<td>Eq NonCapital Medical &amp; Dental</td>
<td>Equipment Anesthesia &amp; respiratory therapy equip., dental equip., diagnostic apparatus, electrotherapeutic equip., examining room furniture, fracture and orthopedic equip., hospital &amp; medical lighting, operating room equipment, x-ray</td>
</tr>
<tr>
<td>Eq Capital Mobile Comp</td>
<td>Eq NonCapital Mobile Comp</td>
<td>Equipment for notebooks, laptops or handheld computers</td>
</tr>
<tr>
<td>Eq Capital Motor Vehicles</td>
<td>Eq NonCapital Motor Vehicles</td>
<td>Equipment for automobiles, buses, forklifts, mopeds, motor cycles, trucks, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Network Components</td>
<td>Eq NonCapital Network Componen</td>
<td>Equipment for routers, switches, hubs and bridges</td>
</tr>
<tr>
<td>Eq Capital Network Servers</td>
<td>Eq NonCapital Network Servers</td>
<td>Equipment for computers designated by the manufacturer as servers, enterprise servers, server blade frames and components, network storage devices and systems, RAID devices, jukeboxes, etc.</td>
</tr>
<tr>
<td>Eq Capital Non-Power</td>
<td>Eq NonCapital Non-Power</td>
<td>Equipment for files, hammers, manual drills, manual hedge clippers, manual lawn mowers, saws, screwdrivers, wrenches, and similar non-power repair and maintenance equipment</td>
</tr>
<tr>
<td>Eq Capital Office Furniture</td>
<td>Eq NonCapital Office Furniture</td>
<td>Equipment for bookcases, desks, chairs, file cabinets, lamps, racks, storage cabinets, tables, and similar office furniture</td>
</tr>
<tr>
<td>Eq Capital Office Machines</td>
<td>Eq NonCapital Office Machines</td>
<td>Equipment for adding machines, bookkeeping machines, calculators, drafting machines, duplicating and phototyping machines, posting machines, transcribing and dictating machines, typewriters, weight scales, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Other Comp Equ</td>
<td>Eq NonCapital Other Comp Equ</td>
<td>Equipment for items used w/ microcomputers, unit record equipment, printers, terminals, card punches, card readers, control units, disk drives, key-to-tape &amp; key-to-disk converters, plotters, tape drives, tape verifiers, bursters, decollators, etc</td>
</tr>
<tr>
<td>Eq Capital Photographic</td>
<td>Eq NonCapital Photographic</td>
<td>Equipment for blueprint equipment, cameras, enlargers, lenses, overhead viewers, projectors, screens, splicers, tripods, and similar photographic equipment</td>
</tr>
<tr>
<td>Eq Capital Power</td>
<td>Eq NonCapital Power</td>
<td>Equipment for power hedge clippers, power mowers, small power drills, small power sanders, small power saws, routers, and similar power repair and maintenance equipment</td>
</tr>
<tr>
<td>Eq Capital Recreational</td>
<td>Eq NonCapital Recreational</td>
<td>Equipment for gymnasium, park, playground, recreational center, and similar apparatus and equipment</td>
</tr>
<tr>
<td>Capital Expenditure Types</td>
<td>Non-Capital Expenditure Type</td>
<td>Long Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Eq Capital UVA Non-Owned</td>
<td>Eq NonCapital UVA Non-Owned</td>
<td>Equipment that is not owned by UVA</td>
</tr>
<tr>
<td>Eq Capital Voice &amp; Data</td>
<td>Eq NonCapital Voice &amp; Data</td>
<td>Equipment for facsimile-transmitters, switchboards, telephones, teletypewriters, and similar equipment</td>
</tr>
<tr>
<td>Eq Capital Watercraft</td>
<td>Eq NonCapital Watercraft</td>
<td>Equipment for amphibious craft, boats, diving bells, rafts, ships, and similar watercraft equipment</td>
</tr>
<tr>
<td>Exp Credit Capital Equipment</td>
<td>Exp Credit Equipment</td>
<td>Reimbursement for expenses originally charged to any expenditure type within the equipment category</td>
</tr>
</tbody>
</table>
Appendix 2: Policies

Summaries of property policies and procedures with their University Accounting Policy & Procedure reference numbers are given below.

The full text of these summaries may be found at:
http://www.virginia.edu/finance/finanalysis/prop.html

General
Preparation of Equipment Inventory Change Request (10-1)
   − This procedure describes how to fill out the Equipment Inventory Change Request, Form P-1.

Maintenance of Equipment Inventory (X.A.1)
   − This policy describes the general guidelines for maintaining the University equipment inventory.

University Collections (X.E.1)
   − This policy relates to the lending of a University collection to an outside borrower.

Use of University Equipment (XV.G.2)
   − This policy describes the general guidelines for using University equipment.

Surplus Property and Gift Equipment
Surplus Property Disposal (VII.A.6)
   − This is the University of Virginia policy for disposal of surplus property.

Gift In Kind Policies (IX.A.11)
   − This is the University of Virginia policy for the acceptance, recording and disposition of gifts of personal property.
Appendix 2: Policies

Grant and Contract Equipment
Overview (VIII.E.1)
− This policy establishes University policy for control of government property acquired under government contracts and grants.

Grant and Contract Changes (VIII.A.5)
− This policy covers budgetary and other grant change requests. In both cases individual sponsor guidelines will govern the individual procedures for an award.

Property Management and Shared Use of Equipment (VIII.C.5)
− This policy describes how property management and shared use of equipment should be handled.

Property Included and Excluded (VIII.E.2)
− This policy describes what property is included and excluded by property accounting.

Acquisition of Research Equipment and Materials (VIII.E.3)
− This policy describes the process for acquiring research equipment and materials.

Maintenance of Equipment Records (VIII.E.4)
− This policy describes how equipment records should be and are maintained.

Equipment Title, Disposition and Subcontracts (VIII.E.5)
− This policy describes the general guidelines for how property titles are to be handled by the University.

Transfer of Research Equipment from UVA (X.A.2)
− This policy describes the procedure for releasing surplus equipment to another institution.

Transfer of Research Equipment to UVA (X.A.3)

Forms
# Form 1: P-1 Equipment Inventory Change Request

This document can be found online in the UVA Forms Directory at: [http://uvaforms.virginia.edu/property/equip-inv-chg.pdf](http://uvaforms.virginia.edu/property/equip-inv-chg.pdf)

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## UNIVERSITY OF VIRGINIA

### EQUIPMENT INVENTORY CHANGE REQUEST

**FORM P-1**

**SECTION A**

**TRANSACTION IDENTIFICATION**

**TRANSFERS**

Attach justification letter if transfer to another agency or institution.

- [ ] Department
- [ ] Location (Interdepartmental)
- [ ] Institution/State Agency

**DISPOSALS**

Attach explanation of transactions in 2nd column. For trades use record PO# for new purchase.

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ACQUISITIONS**

<table>
<thead>
<tr>
<th>TYPE</th>
<th>ADDITIONAL INFORMATION/INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>O&amp;R</td>
<td>Owner/Donor</td>
</tr>
<tr>
<td></td>
<td>Valuation Method: Appraised</td>
</tr>
<tr>
<td></td>
<td>Actual Cost</td>
</tr>
<tr>
<td></td>
<td>Other (Explain)</td>
</tr>
<tr>
<td>Govt. P&amp;O:</td>
<td>Attach DD Form 1540 or explanation</td>
</tr>
<tr>
<td>Supplier:</td>
<td>Attach invoice, IDT or explanation</td>
</tr>
<tr>
<td>Contract:</td>
<td>Attach support for costs involved</td>
</tr>
<tr>
<td>Other:</td>
<td>Attach explanation</td>
</tr>
</tbody>
</table>

## SECTION B

### EQUIPMENT IDENTIFICATION

<table>
<thead>
<tr>
<th>ASSET TAG NUMBER</th>
<th>DESCRIPTION</th>
<th>OLD LOCATION BLDG, FLR, ROOM (TRANSFER ONLY)</th>
<th>NEW LOCATION BLDG, FLR, ROOM (TRANS, ACQ ONLY)</th>
<th>COST/VALUE (ACQ ONLY)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

## SECTION C

### DEPARTMENT IDENTIFICATION

REQUESTING DEPARTMENT

- DEPARTMENT NAME
- PERSON TO CONTACT
- PHONE

FOR INTER-DEPT TRANSFER

- RECIPIENT TO CONTACT
- PHONE

APPROVED BY (SIGNATURE AND TITLE)

- DATE

RECEIVING DEPARTMENT (INTER-DEPARTMENTAL TRANSFERS ONLY)

- RECIPIENT'S SIGNATURE AND TITLE
- DATE

**ROUTING:**

- Original to Property Accounting, Dept. of Financial Analysis and Plant Accounting, Carruthers Hall.
- Retain 1 copy. For interdepartmental transfer (IDT), send 2nd copy to receiving department who should complete and forward to Property Accounting. For assistance, phone 924-4269.

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Print form from the web. Mail or fax the completed form to Property Accounting at: Carruthers Hall, PO Box 400194  Fax:434-982-2163
Form 2: Off-Grounds Equipment Certification

OFF GROUNDS EQUIPMENT CERTIFICATION

I certify that the equipment listed below is at my residence or another off-grounds location, and is being used in a manner consistent with the purpose, mission and goals of the University. See Finance and Administrative Policy XV (2 Use of University Equipment at http://www.virginia.edu/polpocs/policy/policy.html.

Name of institution and person responsible for the equipment:

<table>
<thead>
<tr>
<th>Home Phone</th>
<th>Office Phone</th>
<th>Email</th>
</tr>
</thead>
</table>

Equipment Location: Equipment Identification:

UVA or Institution Location:

<table>
<thead>
<tr>
<th>Building No</th>
<th>Floor No</th>
<th>Room No</th>
<th>Asset Tag #</th>
</tr>
</thead>
</table>

Residence or Institution Address:

<table>
<thead>
<tr>
<th>Street</th>
<th>Model</th>
<th>Manufacturer</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>Description</th>
</tr>
</thead>
</table>

| State | |
|------| |

| ZIP | |
|-----| |

Responsible person’s name (typed / printed)

Responsible person’s signature:

I APPROVE THE LOCATION OF THIS EQUIPMENT.

Dean or Department Head’s name (typed / printed):

Dean or Department Head’s signature:

Organization:

RETURN FORM TO: (Print or type Property Contact’s Name & contact information)

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Form 3: Inventory Certification Form

DUE DATE:
DEPARTMENT NAME ____________________________________________________
DEPARTMENT HEAD ____________________________________________________
PROPERTY CONTACT ____________________________________________________
(Name & Telephone # of Individual Responsible for your Inventory Response)

I have received the equipment inventory reports for my department and all changes, additions, and deletions have been indicated on the “Inventory Changes” report returned electronically to Property Accounting. Any missing or non-functional units have been identified.

Documentation has been enclosed, where available (such as Invoices, P-1 Forms, or Surplus Property Forms), to support any additions to or deletions from our departmental inventory.

The corrected “Inventory Changes” report returned electronically to Property Accounting is an accurate listing of property controlled by this department as of December 31, 2001.

DATE:     __________________________________________________________
SIGNATURE: __________________________________________________________
(Department Head)
Form 4: Request to Surplus

Use “Request to Surplus” E-form at: http://www.procurement.virginia.edu/Surplus