

Equipment Survey Instructions

The equipment survey is **due** by **04/15/2020**. Below is additional information to assist you with your survey. If you have questions, or need assistance, please contact asset-mgmt-survey@udel.edu.

If you have received this survey in error and if you are not responsible for completing the survey, please inform us ASAP.

Equipment Survey Overview:

The purpose of this survey is to ensure the accuracy of the equipment within your department. Please review the following:

1. Does the Equipment exist.
2. Physically verify the location of the equipment. This is crucial to both the F & A proposal process and annual audit.
3. Verify that main equipment items have a printed tag id that is visible on equipment. This is crucial during audits. Component items will not have a printed tag id.
4. Disposal of equipment as necessary.
- 5. Must complete an Equipment Activity webform for all equipment disposals and change of locations.**
- 6. Please use Corrective Info tab below to identify changes that need to occur. Please include all corresponding webform numbers that were created for these changes.**

Equipment Survey Files:

Files are based on equipment as of 2/7/2020. There is a Dept ID sheet and a second sheet labeled Corrective Information. You will need to make corrections to existing data on the Corrective information sheet and process an Equipment Activity Webform. Changes will not be made until the webform is completed.

Equipment Policy:

Policy 5-06: Use and Disposal of University Equipment and Material.

Policy 5-10: Class I Movable Equipment.

Policy 6-08: Transfer of Equipment Purchased on Research and Training Contracts and Grants.

Equipment:

Class I equipment is defined as movable, tangible personal property with an acquisition or declared value of \$5,000 or more, is functional for its intended purposes in and of itself (except for an external power supply if needed), and has a useful life of two years or more.

Accessory / Peripheral:

When purchased separately and added to existing equipment, the value of the accessory/peripheral is added to the equipment value only when the cost of such accessory or peripheral meets or exceeds \$2,000. An accessory/peripheral is one item. This can not be fabricated.

Fabrication:

Fabricated equipment is composed of material purchased for the purpose of building, constructing or assembling of Class I equipment that will be so identified upon completion. Class I equipment at the University of Delaware will include those items in which material costs alone are \$5,000 or more, and will not include labor costs.

Junk:

Unserviceable equipment that is being completely disposed of.

Cannibalized:

A piece of equipment whose parts are being used in other pieces of equipment, rendering the original equipment unusable and unserviceable.

Permanent Transfer Off-Campus:

This option is to be used when a piece of equipment is being permanently transferred to a location that is outside of any of the UD Campuses. Research Office approval will be required in such cases involving research or other grants.

Sold:

Serviceable equipment is sold for currency to an entity outside of the University of Delaware. (If you wish to relocate your equipment within the University of Delaware, Contact Asset Management at (302) 831-5951.)

Stolen:

All thefts of University property must be reported to the University Police (302) 831-2224.

Changes in Status:

Department heads or designees are responsible for notifying the Asset Management of any changes in status of equipment items. Departments must fill out the Equipment Activity Webform to record changes in the status of equipment. Equipment cannot be disposed or relocated until the originator has received an approved copy of the Equipment Activity Webform. Changes in status may also be reported during the annual Equipment Survey.

Transfer between Departments/Divisions

If an equipment item is permanently transferred from one department to another, an Equipment Activity Webform must be completed, even if the location of the equipment does not change. The equipment can not be transferred until the originator has received an approved copy of the Equipment Activity Webform.

Transfer to other Location (within University)

If an equipment item is permanently transferred from one building or location to another an Equipment Activity Webform must be completed. The equipment can not be transferred until the originator has received an approved copy of the Equipment Activity Webform.

Transfers to Home

If the equipment is to be located at home the Equipment Activity Webform must be completed to transfer the equipment off campus. The equipment can not be transferred until the originator has received an approved copy of the Equipment Activity Webform. Research Office approval will be required in such cases involving research or other grants.

Transfer of Equipment and Title to other Institution - See Policy 6-08

If a principal investigator moves to another institution and wishes to take equipment with him/her, permission must be obtained by the Department Chair and the Vice Provost for Research. The department Chair must also certify in writing to the Dean, the Provost, and the University Controller that the research equipment is unique to the Principal Investigator's current research, and that the department does not need the equipment. The department chair must provide the Research Office and the University Controller with a list of equipment proposed for transfer. If approval is obtained, the Equipment Activity Webform must be completed by the principal investigator for each equipment item being transferred. The equipment can not be transferred until the originator has received an approved copy of the Equipment Activity Webform.

Transfer of Equipment and Title from other Institution

If a principal investigator moves to the University of Delaware and brings equipment with them, the items should be added to the University's equipment inventory. Please contact Asset Management at asset-mgt@udel.edu for equipment transferred to the University. Upon notification of the transfer from the outside institution, the equipment item will be added to the University's equipment inventory. The original cost and date of acquisition (if known) should also be noted.

Transfer of Title from Sponsor

If a department acquires title to equipment from a sponsor, please contact Asset Management at asset-mgt@udel.edu. Upon notification of transfers of title, the equipment item will be modified in the equipment inventory to reflect the change in ownership.

Government Furnished Equipment (GFE)

If a principal investigator acquires a piece of equipment on loan from the government, contact Asset Management at asset-mgt@udel.edu. Upon notification of the transfer from the government, the equipment item will be added to the University's equipment inventory and will be listed with the title vested in the government and will not be subject to depreciation.

Donation of Equipment

If a department acquires title to equipment through a donation, contact Gift and Records Management at (302)-831-6801. Upon notification, the equipment item will be added to the University's equipment inventory.

Disposal of Equipment (Sold, Scrapped, Traded-In, or Other)

If a department disposes of an equipment item by selling, salvaging or by some other means of disposal, the Equipment Activity Webform must be completed by the department for each equipment item. If sold, the buyer and selling price should be noted; if "other," an explanation should be written on the form. Upon receipt of this information by, the item will be deleted from the equipment list for the disposing department. If traded-in, the department needs to note the trade information on the Purchase Requisition Webform, the value given for the trade-in, the fair market value of the new equipment.

Lost/Stolen Equipment

If an equipment item is lost or stolen, the University of Delaware Police must be notified (302) - 831-2224, and the police report is attached the Equipment Activity Webform when completed. Upon receipt of this information, a lost/stolen status will be reflected on the department's equipment inventory. Within 90-120 days, the department will be called and asked to verify that this status has not changed (i.e. that the item has not been found or recovered). After this verification, the equipment item will be deleted from the equipment list.

Returned to Sponsor

If equipment is returned to the sponsor, the Equipment Activity Webform must be completed. The date the equipment was returned and the reason for returning it should be stated.

Other Types of Changes

If there is any other change in status of an equipment item, please contact Asset Management at asset-mgt@udel.edu to determine steps that need to be taken. For example, a personally-owned equipment item has appeared on an equipment list by mistake. This information can be indicated in the "other" category. Upon receipt of this information, Asset Management will take the appropriate action necessitated by the explanation.

Printed Tag #

All main equipment items will receive a printed Tag ID during the activation of the equipment. Please place the Tag ID on the equipment in a visible location. Tag IDs are reviewed by auditors during verification of Equipment and locations. If you are unable to attach Tag IDs due to safety reasons or Geographic location of equipment, please inform Asset Management so we can make a note on the Equipment file. Component items will not receive a printed Tag ID.

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Room #	Tag Serial Num	End User	Webform #	Comments
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