FY23 Equipment Survey
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Importance of the Equipment Survey

- Compliance with federal guidelines:
  - Annual Survey is required under Code of Federal Regulation Title 2 § 200.313
  - Agencies have right to audit UD’s management of federally funded equipment, e.g. ONR audit August 2022

- Accurate record keeping:
  - Verifying equipment exists and is being used
  - Safeguarding of assets

- Financial reporting implications:
  - Functionalization of depreciation on financial statements, e.g. depreciation of a microscope in a lab allocated to Sponsored Research based on room coding
Stewardship

- Departments are the stewards of the equipment assigned to them

- Webforms are required when there is a change to the asset
  - Active/Inactive
  - Location Change
  - Change of department
  - Selling or removing an asset

- All assets require an attached UD Tag
  - Tags should be printed from Tagging Webform and affixed to the equipment
  - Contact Asset Management if it cannot be attached
FY23 Equipment Survey

- Appropriate departmental contacts were confirmed by the Asset Management Team between March 22\textsuperscript{nd} and April 7\textsuperscript{th}

- Surveys distribution April 10\textsuperscript{th}

- Surveys need to be returned by May 5\textsuperscript{th}
  - All updates will need to be recorded in Webforms by May 5, 2023
1) Review the Equipment Inventory Listing (see slides 7-11).

2) Complete any necessary Equipment Activity Webforms (see slides 12-14).

3) Return the completed Equipment Inventory Listing to the Asset Management Team by email at asset-mgmt-survey@udel.edu by 05/05/2023.
### Equipment Inventory Listing

<table>
<thead>
<tr>
<th>Dept</th>
<th>Department Name</th>
<th>Tag #</th>
<th>Tag Descr</th>
<th>Acq Dt</th>
<th>Building Name</th>
<th>Floor #</th>
<th>Tag Serial Num</th>
<th>Model #</th>
<th>End User</th>
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<th>Updated Building</th>
<th>Updated Room</th>
<th>Updated End User</th>
<th>Webform #</th>
<th>Comments</th>
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<tr>
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</table>

- Departments will receive an Excel spreadsheet listing of their equipment.
- Any line highlighted in orange indicates a Webform must be submitted to update the room location because it is currently located in an inactive room.
- Data provided represents system records as of 3/31/2023.
Reviewing Equipment Data

- Review each line of data in the Equipment Inventory Listing.
- For all lines that are correct, click the confirmation box in column O. Data should represent status at time of survey completion.
- Any inaccurate data must be updated as described in the following slides.

<table>
<thead>
<tr>
<th>Dept</th>
<th>Department Name</th>
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<th>Updated Room</th>
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</table>

Click the confirmation box to confirm data is correct.
# Updating Incorrect Data

<table>
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<tr>
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</tbody>
</table>

- If the record needs to be updated, please put updated information in cells P-R.
- Go to Webform and fill out a relocation form.
- Add Webform number into column S.
Known Errors: Records Highlighted in Orange

- All records that are highlighted in orange indicate inaccurate data.
- These must be updated via webform.
- Note the webform # as indicated above.

<table>
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<tr>
<td>Example</td>
<td>Example</td>
<td>000101</td>
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</tbody>
</table>

The record is in a room that is no longer active
Please update location in cells P-R
Complete a Relocation Webform
Add Webform ID in Cell S
For any items that are no longer active:

- Highlight the line red
- Complete an Equipment Webform to remove the asset
- Fill in Webform # in column S
- Fill in comments in column T for reason for removal (see definitions in the Equipment Survey Instructions document for proper terminology).
• Access Equipment Webforms at udapps.nss.udel.edu/webforms/embtform?wf_id=355&wf_ty=blank
• Click on the drop-down that best correlates with the record change
Equipment Activity Webform Continued

Tagged (Capital) equipment
Equipment or materials with a tag number (generally $5,000 and greater). [View info.]

Choose the appropriate action below to display more information.

Disposal

Choose one of the following disposal types to inactivate the equipment in your inventory. See disposition definitions. [View]

Type of disposal:
- Junk (JU)
- Cannibalized (CA)
- Stolen (CR)
  (All thefts of University property must be reported to the University Police (831-2224) Attachment of University Police report is required for tagged equipment.)
- Permanent transfer off-campus (TO)
  (A form using this option should not be started until all negotiations are final)
- Sold (SO)

For further information, refer to the following policies:
- Use and Disposal of University Equipment and Material (5-06)
- Class I Movable Equipment (6-10)
- Transfer of Equipment Purhased on Research and Training Contracts and Grants (6-08)

Disposal of equipment with digital media: Before disposal, University information must be completely removed from equipment with digital media in accordance with policy 5-06. You must certify that any digital media has been completely sanitized of University information or destroyed using official University channels.

• Click on type of Equipment Webform to complete
• Complete form
  • Multiple tags can be used on a single form
• Do not dispose of or relocate assets until the form has been approved
• Contact Asset Management for any questions
Contact Asset Management at asset-mgt@udel.edu with any questions.

Thank you for your participation in this important process!