Asset Management would like to thank the Department of Medicine for sharing their Property Procedures with the University community through this document.
Department of Medicine – Procedures for Managing Assets and Attractable Items

This document is to serve in conjunction with the University of Florida Asset Management directives and procedures to accurately track and safeguard University and Government owned capital assets and equipment. Capital assets and equipment are tracked by the department property manager in UF system called myAssets. The system is designed to help departments manage their inventory and communicate important updates about capitalized equipment to Asset Management. It also allows departments to track items below the $5,000 capitalization threshold that the department deems attractive. For the department, these items include equipment that captures and/or stores data, electronic/AV items commonly used at home (i.e. camera, TV, DVD, etc.), and items purchased on grant funds that would be eligible to transfer should PI leave.

Contents
Tracking and Maintenance of Items ............................................................................................................. 3
   Purchases .................................................................................................................................................. 3
   Disposal of Office and Lab Equipment .................................................................................................. 3
   Disposal of Equipment with Freon ........................................................................................................ 3
   Transfer of equipment when PI leaves .................................................................................................. 4
Auditing Assets and Attractable Items............................................................................................................ 5
   Capital Asset Audit – items over $5,000 ............................................................................................... 5
   Departmental Attractable Items Audit ................................................................................................. 5
   Off-Campus and Foreign Travel .......................................................................................................... 5
      Off-Campus Letters .......................................................................................................................... 5
      Foreign Travel .................................................................................................................................. 5
Annual Inventory Process ............................................................................................................................. 6
   Capital Assets – items over $5,000 ........................................................................................................ 6
   Attractable Items – items less than $5,000 ........................................................................................... 6
   Adding an Attractive Item in myAssets: .............................................................................................. 7
Tracking and Maintenance of Items

Purchases
1. Division administrators or person making purchase will complete the Asset and Attractable item form: This should be emailed to the property manager and/or included as an attachment to the fiscal shared services team when purchasing a new item.
2. Based on receipt of completed form, the property manager requests a decal in myAssets.
3. Property Manager receives the decal from Asset Management and coordinates with the division staff/PI to place the decal.

Disposal of Office and Lab Equipment
1. Division administrator or lab staff will email the Property Manager the information for the item to be disposed, ie decal number/description/serial number.
   1. If the item has a hard drive, division needs to submit a service request ticket with IT to have the piece of equipment ‘wiped’ and returned to the division. Division emails Property Manager once item is returned.
2. Upon receipt of the email request from the division, the Property Manager will enter request in myAssets for item to be picked up by Surplus.
   
   NOTE: timing of pick-up is determined by Property Surplus department. In extreme circumstances, expedited pick-up can be requested by Property Manager but is not guaranteed.

Disposal of Equipment with Freon
1. Division administrator or lab staff will email the Property Manager the information for the item to be disposed, ie decal number/description/serial number, note that the item contains Freon.
2. Division will contact an approved vendor to have Freon removed and vendor completed the Equipment Disposal - Refrigerant Recovery form at the time of Freon removal.
   a. The division will need to serve as the point of contact with the vendor servicing the removal. Please ensure that the custodian assigned holds a valid P-Card to provide payment to the vendor at the time of removal.

   DO NOT STORE SURPLUS EQUIPMENT IN HALLWAYS WHILE AWAITING PICK-UP.
   Please note should this occur, Environmental Safety contacts the Department concerning the item(s).

3. Make copy of completed form and attach it to the item.
4. Send the receipt and form to the department Property Manager to have the item surveyed off the asset list.
   a. Fax (352) 265-8056 or e-mail to kimberly.hamm@medicine.ufl.edu
5. The Property Manager will process Surplus Property Pick-up Request after Freon removal is complete.
   b. The division will need to ensure that someone can make the item available when being picked up by Property Services.
Transfer of equipment when PI leaves

1. Upon notice to division by PI that they are leaving UF, the division administrator needs to notify the Property Manager and include whether or not the PI intends to transfer items to another institution.

NOTE: Per UF Asset Management items cannot be given to an individual. In some situations, equipment purchased for a PI’s research can be transferred to the PI’s new institution or agency. If the equipment was purchased with a contract or grant and this contract or grant is transferring with the PI, then the equipment can transfer to the new institution. Note, the equipment can never be transferred to an individual or a for profit enterprise. When equipment will be transferred to another institution, a report of survey must be completed in myAssets for the items to be transferred. The completed survey must be approved by the Division of Sponsored Research and signed by a representative of the institution that will be receiving the items.

2. The Property Manager will then pull list of all assets and attractable items associated with the PI and the respective funding sources pertaining to these items.
3. The division administrator and chief will need to review the list and determine those items they will be allowed to transfer to new institution.
4. Once decision is made, the division will need to complete the Property Transfer Request form.
   a. It is recommended that items from the list provided in Step 2 (above) be copied and pasted into the Transfer Items tab in the spreadsheet.
   b. If there are other items on the list that are will be retained or transferred to other divisional/department PIs/Labs. Please list those on the internal transfer Items tab.
5. Once approved by Chair or his/her designee, a formal UF transfer form will be submitted by myAssets to the receiving agency. At that time, the PI will coordinate all transfer actions with the receiving agency/institution.
6. For any items not being transferred or retained by the division, division should send a department-wide email of available items with 1 week notice.
   a. Notice should include Asset and Attractable Item form, to be completed by division/PI wishing to take possession of an item. This should be sent to the Property Manager once completed.
   b. After one week, division will notify the Property Manager of remaining items to be picked up by Property Surplus. Property Manager will submit a report of survey.
Auditing Assets and Attractable Items

Capital Asset Audit – items over $5,000
Annually, a representative from UF Asset Management team will contact the department with a list of items they wish to audit.

- In the instance that the said item(s) are not found to be in the location noted in the myAsset system and the property manager has no documentation regarding change to location or loss; the division administrator will be asked to address auditor’s questions regarding location/loss of the item.

Departmental Attractable Items Audit
Annually, the property manager will audit operating expense report for items less than $5,000 that meet with the department’s definition of attractable items.

- It is expected that all items will be reported through the ‘Purchase’ process noted above.
- Should an items not be reported, the Asst. Director/Department Custodian will send the respective division the Asset and Attractable Items form.

Off-Campus and Foreign Travel

Off-Campus Letters
Annually, faculty and staff in possession of laptop computers or handheld devices are required to complete updated Off-Site Property Certification form. Individuals are notified electronically, via email, requesting completion of the on-line form.

- If the item is used off-site at Shands/VA facility this address should be used in certifying the location of the item.
- If the item travels off-campus in possession of the individual then the home address for the individual should be used for certifying the secondary location.
- If the item does not level campus then notify the property manager and myAssets system will be updated.

Foreign Travel
Because U.S. export laws occasionally will require an export license to take an item to a specific country, UF policy requires that a Foreign Travel Request be submitted—in addition to following the steps above—before it can be taken outside the United States.

- It can often take many months to receive an export license, so please be sure to submit a Foreign Travel Request as soon as you are aware that an item will need to be taken or shipped outside the United States.
- To submit a Foreign Travel Request, you will need the travelers UFID, the item’s UF decal number, travel dates and the country or countries the item will be taken. If you will be taking multiple trips to different countries, submit them all on the same request, just make sure the dates are inclusive.
• Asset Management will review the information and approve or deny the request. When the travel request is processed, the individual who submitted the request will receive an e-mail letting them know the request to take the equipment to another country has been approved or denied.

• Occasionally, an item will require an export license. In those situations, you will be referred to the Division of Sponsored Research for further assistance.
  o If an export license is required, you will have to wait for the export license to take the item to the country requested.

• Before you leave the U.S.:
  o Be sure there is a UF decal on the item,
  o Print and carry with you the PDF received from Asset Management authorizing the item to be taken out of the U.S.
  o If a license is required to take this item out of the U.S., DSR will provide additional instructions.
  o If available, print and carry with you a copy of the purchase invoice for the item

Annual Inventory Process

Capital Assets – items over $5,000
  Inventory is performed annually July 1 – June 30 with an audit in mid-April.

Attractable Items – items less than $5,000
  Attractive/sensitive assets are tangible personal property that cost less than $5,000 and can be characterized as “walk away” items. These items are prone to theft because they are either not secured, are easily portable, contain new technology and/or they are adaptable for personal use. Any property item included on the United States Munitions List (USML) that costs less than $5,000 will be considered an attractive/sensitive asset.

• Attractive/sensitive items include:
  o Audiovisual equipment
  o Televisions
  o Projectors
  o Communication Equipment
  o Data Processing Equipment
  o Laptops
  o Cameras
  o Digital Cameras
  o Lab equipment
**Adding an Attractive Item in myAssets:**


- **Inventory Timeline**
  - 1 July – inventory begins for the new fiscal year.
    - All decaled items, as well as new assets will need to be scanned. Through myAssets reports, run and download to excel the annual report for unscanned inventory. Once downloaded, sort by building then room number. This allows all divisions’ equipment to be covered.
    - Capital and attractive items.
      - Perform a first pass, go to each area and scan everything in the room with a decal. Once first pass is competed, run another unscanned list. This allows for more detail when looking for an item.
      - Check with Lab or Office personnel, if they know where the item has been relocated, loaned or any information they may have. If the item or items have been relocated, provide the division administrator Assets and Attractive Update Form to update the items new location. If no information is available, this may take some time, back tracking, asking questions and looking in shared areas. These items could also be found by other departments while performing their inventory. Each week when the unscanned list is run, review for those items that are listed as missing.

If an item or items cannot be found, a report of survey will need to be completed due to:

- Abandonment,
- Casualty loss,
- Improperly disposed,
- Lost or stolen.

- Stolen items will need to be reported to UPD.

- Mid-January – Capital assets inventory completion.
- Mid-April – Attractive assets inventory completion.
To: Kim Hamm, Property Manager  
From: Type your name here  
cc: Alicia Wood, Asst. Director Finance  
Date: 2/27/2013  
Subject: Attractable Items & Assets Update

This form is letting you know that the division has an attractable item or asset that needs to be updated in MyAssets.

<table>
<thead>
<tr>
<th>Attractable Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>UFID:</td>
</tr>
<tr>
<td>Type:</td>
</tr>
<tr>
<td>(Desktop, Laptop, iPad, Printer/Scanner, Camera, etc.)</td>
</tr>
<tr>
<td>New/Re-assigning:</td>
</tr>
<tr>
<td>Serial #:</td>
</tr>
<tr>
<td>Location (Building/Room):</td>
</tr>
<tr>
<td>Voucher #:</td>
</tr>
</tbody>
</table>

Complete this section for items over $5,000.

<table>
<thead>
<tr>
<th>Asset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>UFID:</td>
</tr>
<tr>
<td>Item Description:</td>
</tr>
<tr>
<td>Date Received:</td>
</tr>
<tr>
<td>Serial #:</td>
</tr>
<tr>
<td>Location (Building/Room):</td>
</tr>
<tr>
<td>Voucher #:</td>
</tr>
</tbody>
</table>

Update for Existing Item  
If the item is being moved or transferred to new user, please complete section below.

<table>
<thead>
<tr>
<th>Update for Existing Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>UFID:</td>
</tr>
<tr>
<td>Tag #:</td>
</tr>
<tr>
<td>Location (Building/Room):</td>
</tr>
</tbody>
</table>

Please email this form to the DOM Property Manager to ensure MyAssets is updated. mailto:kimberly.hamm@medicine.ufl.edu or mailto:alicia.wood@medicine.ufl.edu