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 22nd and April 7th

▶ Surveys distribution April 10th

▶ Surveys need to be returned by May 5th

　　▶ All updates will need to be recorded in Webforms by May 5, 2023

Steps to Complete the Equipment Survey

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

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
EX01	Example	206454	Example 1	1/1/2013	NN05	Example	0325	ABC	A	M. Rothfuss	0008419664	TABLE, WORK	A	☐					
EX02	Example	203173	Example 2	3/20/2013	NN05	Example	0653	DEF	B	M. Rothfuss	0008947434	TABLE, WORK	A	☐					
EX03	Example	204791	Example 3	6/27/2013	NN05	Example	0441	GHI	C	M. Rothfuss	0006209459	TABLE, WORK	A	☐					
EX04	Example	200278	Example 4	10/20/2015	NN05	Example	0150	JKL	D	M. Rothfuss	0006805362	TABLE, WORK	I	☐					
EX05	Example	200321	Example 5	4/27/2017	NN05	Example	0565	MNO	E	M. Rothfuss	0009988363	TABLE, WORK	I	☐					
EX06	Example	205222	Example 6	5/4/2017	NN05	Example	0766	PQR	F	M. Rothfuss	0006050830	TABLE, WORK	A	☐					
EX07	Example	217639	Example 7	1/28/2020	NN05	Example	0716	STU	G	M. Rothfuss	0006339646	TABLE, WORK	I	☐					
EX08	Example	212982	Example 8	2/3/2020	NN05	Example	0693	VWY	H	M. Rothfuss	0000615504	TABLE, WORK	A	☐					
EX09	Example	215630	Example 9	5/12/2020	NN05	Example	0161	YZ	I	M. Rothfuss	0008898829	TABLE, WORK	I	☐					

- 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.

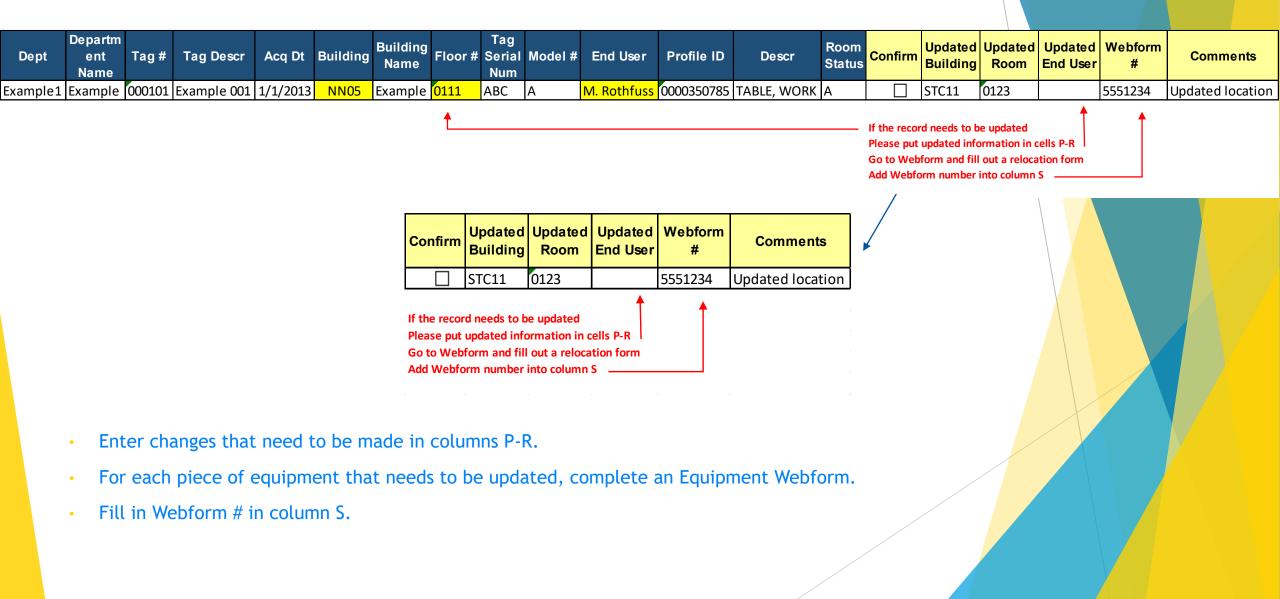- Data provided represents system records as of 3/31/2023.

Reviewing Equipment Data

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	☑					

Click the confirmation box to confirm data is correct

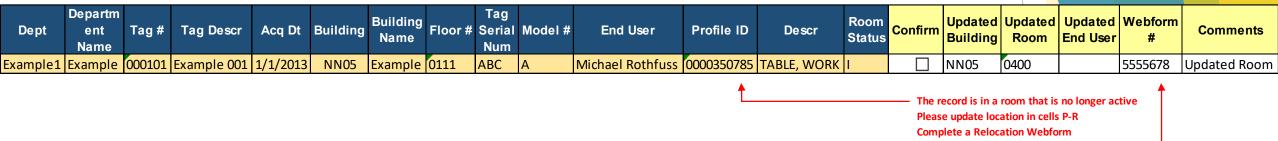| Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
☑					

Click the confirmation box to confirm data is correct

- 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.

Updating Incorrect Data

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	☐	STC11	0123		5551234	Updated location

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

Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
☐	STC11	0123		5551234	Updated location

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

- Enter changes that need to be made in columns P-R.

- For each piece of equipment that needs to be updated, complete an Equipment Webform.

- Fill in Webform # in column S.

Known Errors: Records Highlighted in Orange

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	Michael Rothfuss	0000350785	TABLE, WORK	I	☐	NN05	0400		5555678	Updated Room

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

- All records that are highlighted in orange indicate inaccurate data.

- These must be updated via webform.

- Note the webform # as indicated above.

Equipment: Inactive or No Longer in UD Possession

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	☐				5555679	Junk

The equipment is no longer active or we no longer with UD highlight line red
Complete a corresponding Webform with correct reasoning (Junk, Sold, etc.)
Add Webform ID in Cell S
Add comment in Cell T with reasoning

Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
☐				5555679	Junk

The equipment is no longer active or we no longer with UD highlight line red
Complete a corresponding Webform with correct reasoning (Junk, Sold, etc.)
Add Webform ID in Cell S
Add comment in Cell T with reasoning

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).

Equipment Activity Webform

- 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). More 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.

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 (5-10)
- Transfer of Equipment Purchased 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

Equipment Activity Webform Continued

- 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

Contact Asset Management at asset-mgt@udel.edu with any questions.

Thank you for your participation in this important process!