Asset (Property) Relief Request Form Approvals

Overview

This document details how to:

1. Approvals Steps and Form Requirements
2. Approving a request to receive AM Review Board Approval
3. After AM Review Board Approval updating with needed information to finalize the disposal/retirement of an asset:
   A. Attachments by the AO/D and then approved by AO/D
   B. Attachments by submitter and then approved by AO/D
Abbreviations Defined:

AM - Asset Management
AMS - Asset Management Services (This is interchangeable with Asset Management Office or AM Office)
AO - Accountable Officer
AOD - Accountable Officer Designee
AO/D - Accountable Officer or Accountable Officer Designee
CANN - Cannibalization
CF - Chart-Field, (CFs for plural)
DEPTID - Department ID
DON - Donation
DSR - Department of Sponsored Research
FUND - Fund Code
NBV - Net Book Value
OPDP - Operating Unit and Department ID Combination. Used for search for AO/D
OTR - Other
OU - Operating Unit
PRR - Property Relief Request
RTS - Returned To Sponsor
SAL - Salvage
STOL - Stolen
SUR - Surplus
TRIN - Trade-In
TRNISA - Transfer In-State Agency
TRNOSA - Transfer Out of State Agency
TRNOTRUNI - Transfer to Other In-State University
TRNSRFND - Transfer to Research Foundation
TRNUSSFFND - Transfer to USF Foundation
UCO - University Controller’ Office
UNLOC - Un-located
VEHIBID - Vehicle Bid

This document is not intended to replace the Property Manual located at http://www.usf.edu/business-finance/controller/documents/propertymanual.pdf This document is ONLY for the instruction of approving Property Relief Requests.

When a department no longer wishes to keep an asset and they plan on disposing of it they must submit a request BEFORE disposal to get approval for the removal of the asset. Disposing of an asset before approval is a violation of USF and State policy.

All attachments should be separate. Each attachment should have a file name descriptive of what is in the attachment. For example, a Certificate of Disposal would have the words CertOfDisposal. You may add the Tag Number if you want to help with tracking. If it's a letter of acceptance LTROFACCEPTANCE works.
The email address asset-help@usf.edu has been set up for you to use to request assistance. Please be as detailed as possible when submitting an inquiry to the help address.

**Approvals Diagram**

The below flow chart illustrates the approvals process for Property Relief Requests. Please note the differences depending on certain aspects of the type of request or asset information. For those assets which have a project ID in its CF String the Department of Sponsored Research must approve the request. For Un-Located or Stolen requests the AO/D needs not take further action on the request. All other requests have actions to be taken by the AO/D after the AM Review Board approves the request.
FORMS REQUIREMENTS

The below table is to provide a quick reference to what actions are needed for each type of request. Some require attachments and some require values entered in fields. ALL except for Un-Located and Stolen requests have actions to be taken by the AO/D after the AM Review Board Approves. Failure to complete the final actions means the asset remains in service and if the asset cannot be inventoried will be placed on the department’s missing asset listing.

All attachments should be separate attachments. You should not combine different attachments together. For example, if you have a completed Supplemental Form and a Police report, attach each separately. The system requires this and it helps for review for required documentation. If you were to attach the two together in the same document the system will advise you that you are missing an attachment.

Each type of form provides some of the information to help assist the end user during form entry and the approvals process.

<table>
<thead>
<tr>
<th>Type of Request</th>
<th>Attachments Required</th>
<th>Qty of Attachments Required</th>
<th>Field Entry Required</th>
<th>Attachments Required</th>
<th>Qty of Attachments Required</th>
<th>Field Entry Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salvage Surplus</td>
<td>No</td>
<td>No</td>
<td>Yes, Certificate Of Disposal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cannibalization</td>
<td>No</td>
<td>No</td>
<td>Yes, Certificate Of Disposal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Un-Located</td>
<td>Yes, Supplemental</td>
<td>1</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Stolen</td>
<td>Yes, Supplemental Form and Police Report</td>
<td>2</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Trade-in</td>
<td>Yes if a foundation PO/REQ is used and not a USF FAST PO/REQ</td>
<td>Yes, REQ or PO must be entered. FAST! PO/REQ must state Trade-In on it</td>
<td>Yes, Documentation of Equipment Removal</td>
<td>1</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>E-Bid</td>
<td>No</td>
<td>No</td>
<td>Yes, Documentation of Equipment Removal and E-Bid Documentation</td>
<td>2</td>
<td>Yes, Must Enter E-Bid Number in field provided</td>
<td></td>
</tr>
<tr>
<td>Vehicle Bid</td>
<td>No</td>
<td>Yes, Make, Year, and VIN are required, Odometer reading is optional</td>
<td>Yes, Proof of Sale and any other documentation</td>
<td>1</td>
<td>Yes, Must enter Vehicle Bid Number in field provided</td>
<td></td>
</tr>
<tr>
<td>Donation</td>
<td>Yes, Letter of Intent to Donate and Certificate/Proof of Non-Profit Status</td>
<td>2</td>
<td>Yes, Must attach Letter of acceptance</td>
<td>1</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>Yes, Letter of Intent to Transfer or Return</td>
<td>1</td>
<td>Yes, Letter of acceptance</td>
<td>1</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
Asset Management Form Approval Notification

When a Property Relief Form is submitted for approvals the AO/D must approve the form before it may go any further. A notification similar to the one below is sent to the AO/D entered on the request.

```
- Asset Management Form Approval Notification

Do_Not_Reply@forest.usf.edu

Mon 8/7, 9:19 AM

The Asset Form 0000000825 requires your approval.
Please log into FAST through the MyUSF: https://webauth.usf.edu/login Once logged in navigate to Main Menu > USF Menu Items > Asset Forms > Approve Forms > Accountable Officer Approval. Thank you.
```

Accountable Officer Approval

Navigate to: USF Menu Items>Asset Forms>Approve Forms>Accountable Officer Approval

Your Empl ID will already be entered in the field.

Click Search to search for forms awaiting approval for your Empl ID.
If there is more than one request awaiting approvals, a list of those forms awaiting your approval will be provided.

Clicking on the row for the request you want to approve takes you to the "Asset Management Form Approvals Page for Accountable Officer"
Should there be only one result for approvals you will bypass the list and go straight to the "Asset Management Form Approvals Page for Accountable Officer."

Click on the Approve Form link.
Relief Request Form Explained

The PRR form is composed of multiple sections. There are very few things which must be populated in the form for the form to begin its process of approvals. Unlike the paper form the electronic form automatically populates the CFs for you as well as Net Book Value information. The next few pages show in detail what is needed to complete each type of request.

1. **Request Number** - This signifies it is a Property Relief Request. **0000000000** - This is a unique sequential number assigned to the form.

2. **Tag Number** - This is the Tag Number entered on the Add Tab and is the Tag Number the department is requesting relief from.

3. **Status** - This is the status of the form. The statuses for the PRR forms are:
   - **Pending** - This form is in a non-submitted status. It is either in process before being saved, saved but not submitted, or rejected before the AM Board Approval.
   - **Submitted** - This form has been submitted to the AO/D selected on the form for approval.
   - **AO Approval Completed** - The AO/D selected on the form has approved the request after submission. It will either now go to the AM Office for review or to the Department of Sponsored Research For approvals if the asset has a project id.
   - **Grant - Research Approved** - This status states the form has been approved by DSR. The form is now routed to the AM Office for review before being sent to the AM Review Board for approval.
   - **AM Staff Reviewed** - This status indicates the AM office has reviewed the form and any information provided and has now forwarded it to the AM Review Board Member for the area the asset belongs to.
   - **AM Review Board Approved** - The request has been approved by the board. The request is now in the AO/D’s queue to finish the disposal process and update accordingly.
   - **Final Approved** - The request is finalized. This means the AM Office has taken action to retire the asset in the system. This will show in U_ASSETS_BY_MY_DEPARTMENT query after the month closes.

4. This section provides the information related to the department and the contact information for the submitter.

5. The View Comments link will take you to a page to view any comments in regards to the form. The View Comments link takes you to the AM Approvals History page which provides a listing of all the approvals for the form. The AM Approvals History page is a good page to use for seeing where your request is at in the approvals process.

6. The Attachments link is to attach documentation to the request or review already attached documentation. Attachments may be required at the beginning of the request upon submit or after the AM Review Board Approves.
5. The Type of Request section is where you will inform the central staff and the AM Review Board WHY the department is requesting disposal of the asset. Each section is detailed in greater detail after this section.

6. This area changes depending on the selection of radio buttons to the left. This area may provide additional fields and/or requirements for completing the request.

7. Vehicle Information - For Vehicle Bids Vehicle Make, Year, and VIN are required, the Odometer Reading is optional. If disposing of a vehicle through other types of request this information isn't required, however you should still enter it.

8. This section contains the current asset information. The Net Book Value is valid as of the last day of the previous month the form was created. These values remain static for the life of the request.

9. This section contains the information of the AO/D selected to approve the request.
RELIANCE FROM PROPERTY ACCOUNTABILITY APPROVAL PAGE

Failure to complete the appropriate requirements/attach documentation per the type of request will result in the asset remaining in-service and will be considered un-located/missing.

**TYPE OF REQUEST**

- Salvage/Surplus
- Cannibalization
- Un-located
- Stolen
- Trade-In
- E-Bid
- Vehicle Bid
- Donation
- Other

**Reason for Request**

- Damaged
- Obsolete
- Excess
- Outdated Technology

After AO receives notification of approval from the Asset Management Review Board, AO must attach certificate of disposal and approve to return to AM Services for final actions.

**VEHICLE INFORMATION**

- Vehicle VIN #: [Redacted]
- Year: [Redacted]
- Vehicle Make: [Redacted]
- Odometer Reading: [Redacted]

**ASSET INFORMATION**

- Tag Number: 49000275498
- Description: LASER SYSTEM
- Manufacturer: SACHER LASER TECHNIK LLC
- Asset Location: ISA1043
- Operating Unit: [Redacted]
- Fund: 20000
- Department: 125300
- Total Cost: 15916.44
- Acquisition Date: 05/11/2015
- Model: TEC 150
- Serial ID: 01180-0151-00300
- Acquisition Date: 2015
- Net Book Value: 12232.13

**ACCOUNTABLE OFFICER INFORMATION**

- AO/Designee: Woods, Lilla M
- Telephone: 813/974 [Redacted]
- Email: [Redacted]@USF.EDU

**Form Options**

- Approve
- Reject
- Return to Approval List
The next pages describe the various types of requests and the requirements in greater detail. For Salvage/Surplus and Cannibalization are discussed together because their requirements are identical. Un-Located and Stolen are also discussed in the same section however their requirements are slightly different depending on the type. All others are discussed in their own section below. The table earlier in this document is a quick guide representative of the below. The below information is directly from the entry training documentation. The bolded numbers in each section pertain to the AO/D.

Update to the Process

All requests now require the following:

1. PDF attachments of the three days of advertisement on the List Serv
2. If the NBV of the asset is greater than $1,000 a detailed explanation of why they are requesting disposal must be attached.
3. Upon final disposal by the department, the AO/D must enter in the Asset Comments field the USF Employee which witnessed the disposal of the asset.
Salvage/Surplus and Cannibalization

Salvage/Surplus and Cannibalization requests both have the same requirements.

1. Select the type you need:

**Salvage/Surplus**: for use when having a certified vendor remove the assets.

**Cannibalization**: is for when you intend to "part out" the asset to use the parts in another asset to keep the other asset going. For example, you have two X1000 Microscopes. One has a broken Coarse Focus knob but all the other parts work. The other microscope has a broken Revolving Nosepiece. Separately you have two broken microscopes, you are going to take the Course Focus Knob from the microscope with the broken Revolving Nosepiece and use it on the other. Once completed you have one fully functioning microscope and the other is now much worse off than before. Preferably BEFORE you do this cannibalization, you submit a request for approval to cannibalize the one asset.

2. Select the reason for the request: This is the same for both. Choices are:

**Damaged** - The asset is damaged and is no longer functioning.

**Obsolete** - The asset is obsolete and no longer useable because of such.

**Excess** - The asset is an extra unneeded asset.

**Outdated Technology** - The technology is outdated and no longer usable

3. Once the AM review board approves the request the department may then dispose of or cannibalize the asset.

**Salvage/Surplus** - A certificate of Disposal must be attached by the AO/D. This cert obtained from the approved vendor who takes away the asset.

**Cannibalization** - A letter from the department stating the cannibalization has occurred.

4. The AO/D approves the form to return to the AM Office so the request may be finalized.
### TYPE OF REQUEST

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salvage/Surplus</td>
</tr>
<tr>
<td>Cannibalization</td>
</tr>
<tr>
<td>Un-located</td>
</tr>
<tr>
<td>Stolen</td>
</tr>
<tr>
<td>Trade-in</td>
</tr>
<tr>
<td>E-Bid</td>
</tr>
<tr>
<td>Vehicle Bid</td>
</tr>
<tr>
<td>Donation</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

### Reason for Request

<table>
<thead>
<tr>
<th>Reason for Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damaged</td>
</tr>
<tr>
<td>Obsolete</td>
</tr>
<tr>
<td>Excess</td>
</tr>
<tr>
<td>Outdated Technology</td>
</tr>
</tbody>
</table>

After AO receives notification of approval from the Asset Management Review Board, AO must attach certificate of disposal and approve to return to AM Services for final actions.
Un-Located and Stolen

1. Select the Type you need:

Un-located - The department has exhausted all attempts to locate the asset and the asset is un-located.

Stolen - The asset is known to be stolen. The department also has a police report in regards to the stolen asset.

2. Download a Supplemental Form, complete the form and when the attachments link is available you will be able to attach the form.

3. After adding the AO/D, the form has been saved, and a number assigned to the form, the attachments link appears.

Un-located - Attach a completed Supplemental Form

Stolen - Attach a completed Supplemental Form AND in a SEPARATE attachment attach a copy of the police report.

4. This request, unlike all the others, does not require additional actions by the AO/D after the approval of the AM Review Board.
Trade-In

1. Select the Trade-In Radio Button.

2. For a trade in a Requisition or a Purchase Number needs to be provided. If this trade in is being conducted through a Foundation or Research Foundation REQ or PO that number must be provided as well as a copy of it. For a USF PO, the PO must state Trade in on the PO. If this is in a field only viewable and printable by individuals in your department you must attach a copy of the USF PO to the request. The central AM staff cannot see some comments on POs which are protected.

3. Once the form is approved by the AM Review Board and the AO/D receives the request back. The AO/D is required to attach documentation of equipment removal before re-approving to send to the AM Staff for final actions to be taken.

4. The AO/D approves the form to return to the AM Office so the request may be finalized.
E-Bid

1. Select the Radio Button for E-Bid

2. There are no attachments or any items to complete upon submission.

3. Once the AM Review Board approves, the AO/D will then be required to complete the E-Bid. When all is complete, the AO/D enters in the Field provided on the form the E-Bid Number. The AO/D will also attach documentation of asset removal as well as the E-Bid Documentation.

4. The AO/D approves the form to return to the AM Office so the request may be finalized.
Vehicle Bid

1. Select the Radio Button for Vehicle Bid

2. Vehicle Make, Year, Vehicle VIN # are all required before saving and submission. Odometer Reading is not required but is requested.

3. Upon approval by the AM Review Board the AO/D will

   A. Print a copy of the form where it states AM Review Board Approves.
   B. Contact Certified Supplier/Vendor
   C. Contacts Purchasing and provides the Supplier Information and copy of AM Board Approval.
   D. Purchasing will handle the sale.
   E. Once received, the AO enters the Vehicle Bid # and attaches proof of sale/other documentations.

4. Once the above is finished the AO will then approve the form to return to the AM Staff so they may take final actions on the request.
Donations

1. Select the Radio Button for Donation

2. Once the AO/D is assigned and the form has been saved so a number is assigned to the form, before submission the following must be attached:

   A. Letter of Intent to Donate the asset to a Non-Profit entity. This letter is signed by the AO for the department.
   B. Certificate of Non-Profit Status. (a 501-C or 503)

3. Once the AO/D receives the request back after the AM Review Board approves the AO/D must attach a letter of acceptance from the receiving agency stating they accept the asset.

4. The AO/D approves the form to return to the AM Office so the request may be finalized.
Other

1. Select the Radio Button for Other.

2. From the Drop-down menu select one of the following:

   **Returned to Sponsor** - The asset is being returned to the sponsor of the project after the project has ended and per the requirements of the project.

   **Transfer - Research Foundation** - The asset is being transferred to the Research Foundation.

   **Transfer In-State Agency** - The asset is being transferred to a State Of Florida Agency. (For a State University use the next option).

   **Transfer Other In-State Univ** - The asset is being transferred to another State of Florida University or 4 year College.

   **Transfer Out of State Agency** - The asset is being transferred to a PUBLIC agency in another state or another state University or College.

   **Transfer to USF Foundation** - The asset is being transferred to the USF Foundation.

3. Once the AO/D has been assigned in the AO/D field, the form has been saved, and a number generated for the form. You MUST attach a Letter of Intent to Transfer stating the intention of transferring to the other agency. This letter must be signed by the AO for the department.

4. Once the AO/D receives the request back after the AM Review Board approves the AO/D must attach a letter of acceptance from the receiving agency stating they accept the asset.

5. The AO/D approves the form to return to the AM Office so the request may be finalized.
Viewing Comments/Reviewing AM Form Approval History

Clicking on the View Comments link on the form opens a page to view the approval history as well as any comments on the form.

The Pages lists the approvals as well as the date Time stamp of the approval. The Form status is the status at the time of the approval.

For the below, line 1 is when the form was saved to the system and provided a form number. Line 2 shows when the form was submitted for approvals.
When finished with reviewing the approvals and comments page, click the X for the browser tab for the form to close out the window and return to the form.

Viewing Attachments

Clicking on the Attachments link will take you to the Attachments Page to review any and all attachments for the form. This is also the place where the AO/D may go to add additional attachments to the form. This is explained a little later in this document in the Attaching required documentation after the AM Review Board approval and the disposal of the asset has occurred.
For the request below, we can see there are two attachments for this report. Proper name of the files should assist in knowing what is attached to the request. This is a stolen request as there is a supplemental form attached as well as a police report.

To view an attachment, click on the View Attachment Button. When finished reviewing the attachments click the X for the browser ta to return to the Accountable Officer Approval page.

Once finished reviewing the request and you wish to approve, on the Approvals page click the Approve button.

If you need to reject the request, enter a comment why it's being rejected (up to 50 characters) in the field provided and click Reject.
When you click approve you will be presented with a message similar to the one below. An email will be sent to the next approver so they may take action.

```
Message

* The ASSET Form 0000000845 has been Approved. An email has been sent to Asset Management to have the Form further approved. *

OK
```

AM Board Approval

After the AM Office reviews the request it is sent to the appropriate AM Board Representative with the authority to approve the requests for your area. When the member approves the request the AO/D will receive an email stating the AM Board has approved the request. Should the AM Board reject the request, it is sent back to the beginning and given a pending status and must be updated and resubmitted.

Below is an example of an email for a request which the Board approved. As AO/D you have some finalizing actions to take on the request. All requests you receive back from the Board approved require an attachment. Some of the requests require the entry of values in a field.

There are two options on how to handle the attachments which are explained next.

```
FASTTEST - Asset Management Form Approval Notification

F          Do_Not_Reply@forest.usf.edu
Yesterday, 11:30 AM

FASTTEST

The Asset Form 0000000852 has been approved by the AM Review Board and requires ACTION and APPROVAL. Please log into FAST through the MyUSF: https://webauth.usf.edu/login Once logged in navigate to Main Menu > USF Menu Items > Asset Forms > Approve Forms > Accountable Officer Approval and search for the Form Number in the 'Find an Existing Value' tab.
```
Option 1: AO/D attaches any necessary documentation, updates, and then approves.

For example, here is a Salvage/Surplus which was approved by the Board. The asset has been disposed of using an approved vendor. The vendor has provided the AO/D with a Certificate of Disposal. The AO/D must attach the certificate of disposal and re-approve to send back to the AM Office so final actions may occur.

First, notice the status states "AM Review Board Approved."
Second, Click on the Attachments link.
On the tab opened, click the Add Attachment link, navigate to your PDF document you wish to attach.

Click Upload once the document is selected.
Wait for the page to refresh. You will be presented with the Request For Relief page again. If you need to add another attachment, click the attachments link again and repeat the steps necessary to attach.
Click the plus sign next to one of the attachments to add another row.

Click the Add Attachment button to add a new attachment.
Once you are finished attaching documents, click the X to close the tab.

Enter in the Asset Comments field the Name of the person witnessing disposal. If not included will be rejected/returned.

Then on the Accountable Officer Approvals page click the Approve button.
You will be presented with a message stating it is being forwarded on to Asset Management.

As mentioned earlier, some requests require an additional data entry at the point after AM Board Approval. For E-Bid and Vehicle Bid a Bid Number needs to be entered. ONLY NUMERICAL VALUES ARE ACCEPTED.

AO/Ds ONLY have the ability to update these values. Whether using Option 1 for attachments or Option 2 for attachments (explained a little later) the AO/D has to enter the E-Bid Number or Vehicle Bid Number.
Option 2: Submitter or other person attaches documentation, AO/D approves once finished.

For AO/Ds who wish to not attach documents to the request after the AM Review Board Member has approved there is an option to have a different user handle this. The AO/D may forward the email received of the approval by the AM Review Board to the staff member who will be responsible for adding attachments. The person who is to attach the required documents will need to navigate to: USF Menu Items>Asset Forms>Submit Forms>Request For Relief. On the 'Find an Existing Value' tab the user will need to search for the Form which requires attachments.
The user will only be able to attach documents. Any field updates such as Vehicle Bid Number or E-Bid number will need to be completed by the AO/D. Edits to fields which need to be completed before final actions are taken are ONLY allowed to be edited by the AO/D who has approved the request. The user should validate the Status states 'AM Review Board Approved'. If it doesn't then the user should not proceed.
On the Attachments page, they can click the Add attachment as they normally do with their creation of the requests and handle accordingly.

When the user is finished they will need to advise AO/D the request has the necessary attachments. If there are any updates to the page like Vehicle Bid Number, or E-Bid Number you will need to enter the value and then click the Approve button at the bottom of the page. If there are no fields to update you just need to click Approve. It will then go on to the AM Office to do the final review and finalize the process.
Rejection Notice after AM Board Approval

Should an AO/D send back a form to the AM Office after the AM Review Board approved the request AND said request was missing a needed attachment/incorrect attachment provided, the AM Office will reject the request back to the AO/D. This is different than the other levels of rejection where it goes back to the Submitter. Since the AM Review Board has already approved and only additional steps are needed to complete it makes no sense to send the form back to the beginning to go through all the approvals process again. Please take the corrective action necessary, or have someone take the corrective action necessary. Once complete re-approve to send back to AM.

FASTTEST - Asset Management Form Approval Notification

Do_Not_Reply@forest.usf.edu

Yesterday, 11:15 PM
Van Der Meulen, Daniel; See, Greg

FASTTEST

The Asset Form 0000000829 was returned to AO Designee for revision. Please log into FAST through the MyUSF: https://webauth.usf.edu/login. Once logged in navigate to Main Menu > USF Menu Items > Asset Forms > Approve Forms > Accountable Officer Approval and search for the form number in the 'Find an Existing Value' tab.