2019 Biennial Capital Physical Inventory Kick-Off Meeting
Purpose of Inventory - External

- State of Arizona Requirements
  - “Each agency must annually perform a physical inventory of its capital assets and stewardship resources to ensure that adequate care is being exercised in the control and accountability of State resources and assets” (State of Arizona Accounting Manual, Topic 25, Section 40, Page 1)
  - Authority:
    - A.R.S. § 35-131

- Federal Requirements
  - Periodic physical inventory of all Government Property
  - Title 48 Code of Federal Regulations (CFR) Part 45
Purpose of Inventory - Internal

- Maintain Accurate Financial Records
  - University Capital Movable Assets ($523,309,000)
  - Depreciation ($396,636,000)

- Maintain Accurate Asset Count
  - Inventory System (current inventoriable assets 16,450)

- Compliance with University Policies
  - Property Management Manual (PMM)
2019 Inventory Timeline

• January 30th - April 23th
  • Departments conduct Capital Physical Inventory

• April 23th
  • Inventory Certification Statement (ICS), Inventory Reports along with the required backup must be submitted to Property Management

• January - July
  • Property Management inputs submitted changes into UAccess Financials

• June – July
  • Property Management conducts limited on-site verification of equipment and accuracy of recorded UAccess Financials information
What is Considered Capital Equipment?

- Equipment must meet **all** of the following criteria to be considered capital equipment:
  - Acquisition cost of $5,000 or more,
  - Useful Life greater than one year,
  - Free Standing,
  - Movable or Portable,
  - Complete in Itself, and
  - Will not lose Identity when affixed to or installed in another asset

**NOTE:** Sponsor Titled non-capital equipment (acquisition cost between $0-$4999) will be inventoried as well.
Inventoriable Assets

• University Titled capital assets
  • A-tags
  • D-tags

• Federal / Sponsor Titled assets
  • S-tags
Inventory Resource Folder

**Left Side:**
- Inventory Distribution Memo
- Contact Sheet
- Inventory Process Procedures
- Sponsored Projects FAQs
- Request for Authorization to Dispose of Property (RADP) form
- Off Campus form

**Right Side:**
- Inventory Certification Statement (ICS)
- Inventory Report(s)
- Return Envelope
UAccess Analytics Inventory Reports: How to Open Reports

- Log into UAccess Analytics using NetID & password

Click Dashboards

Select Central – Capital Assets
Click Inventory Reports

Click Physical Inventory Report (Static)

Definitions

- **Static** - Snapshot or picture of assets that does not change over time.
- **Dynamic** - Updated asset information reflecting daily edits, retirements, additions, and transfers (time delayed by one day).
- **Baked-In Filters** - Filters that are automatically applied on the backend and cannot be manipulated. The baked-in filters for these reports are designed to show all capital assets based on active capital status codes regardless of ownership. A filter for the inventory status code is “N” and the asset belongs to one of several Sponsor agencies (55063, 55064, 55065, 55067, 55069, 55070, 55072, 55073, 55075, 55076, 55078, 55080, 55082, 55084, 55085, 55189, 55036, 55037, 57213, 57475, 57514, 81198, 81197, 81198).

**Sorting Definitions:**

- **Department/OU Org** - This version should be submitted to Property Management for the official inventory.
- **Building/Room Number** - This version can be used by departments to assist them with completing the official inventory to find assets in common locations across Inventory Units.

**Filter Definitions:**

- **Organization Code** - This includes all Unofficial Org Codes that roll up/report to it.
- **Unofficial Org Code** - This is to search for both Official Org Codes & Unofficial Org Codes.

Asset Inventory Search

Purpose: Broad search with more fields and no baked-in filters. This report should be used for general use when you need more information that is not provided on the other reports to help clean up inventory or do research on assets.

Baked-In Filters: No.

Physical Inventory Report (Static)

Purpose: Official Report for Capital Physical Inventory. This report should be used for the official inventory and submitted to Property Management when completed. It is a static report that only shows a snapshot of the inventory at a point in time. The Department/OU Org sorting is the version that must be submitted for the official inventory.

Baked-In Filters: Yes.

Asset Search

Purpose: Excel style asset search with no baked-in filters. This search should be used when departments want to search for all their assets (not just those required during an official inventory) when they want to review all their assets or a subset of assets.

Baked-In Filters: No.

Inventory Search (Dynamic)

Purpose: Excel style asset search with the same physical inventory baked-in filters but dynamic. This search should be used when departments want to search for assets that are normally included in the official inventory. However, this report is dynamic and is updated daily so it can be used at any time.

Baked-In Filters: Yes.

Asset Report

Purpose: PDF style asset report with no baked-in filters. This report should be used when departments want to search for all their assets (not just those required during an official inventory) when they want to do a separate inventory of all their assets or a subset of assets outside of the official inventory.

Baked-In Filters: No.

Inventory Report (Dynamic)

Purpose: PDF style asset report with the same physical inventory baked-in filters but dynamic. This search should be used when departments want to search for assets that are normally included in the official inventory. However, the report is dynamic and is updated daily so it can be used at any time if a department wants to hold a special inventory.

Baked-In Filters: Yes.
Select Physical Inventory Report (Static) tab

This should auto populate for your department but if you are responsible for multiple departments, select them using this dropdown menu; then click apply

Click to open printing options
UAccess Analytics Inventory Reports: Reprints

- We have included a copy of these reports in your folder.
- If you need to reprint them, Property Management will only accept the **Landscape PDF version, sorted by Department / Inventory Unit, Single-Sided**.
  - You can use other versions of the report for yourselves but make sure to submit the correct version to Property Management.
# Inventory Report

## 2019 Capital Equipment Inventory sorted by Dept and Inventory Unit as of 01/24/19

<table>
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<tr>
<td>MC 158 0402B</td>
<td>A329418 169417 02/13/2018</td>
<td>$12,591.66 $11,332.49</td>
<td>- 6813730</td>
<td>A 11235</td>
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</table>

**IU-Total Cost:** $28,391.51  
**IU-Total Net Book Value:** $11,332.49  
**IU-Asset Count:** 3

**Dept-Total Cost:** $28,391.51  
**Dept-Total Net Book Value:** $11,332.49  
**Dept-Asset Count:** 3
Conducting Inventory

- Start by Verifying Building and Room Number
- Verify assets in each room
- If property tag cannot be found use manufacturer, model, and serial number to identify the asset
  - Request a new tag on the report by writing “Needs Tag”
## Conducting Inventory

- Verify the correct tag number along with manufacturer, model, and serial number of each asset
- If asset is found but has missing or incorrect information
  - Check “YES” in the Found Status column **AND**
  - Write correction(s) next to corresponding field(s)
- Sponsored Titled assets are **required** to have the manufacturer, model, & serial number filled in
  - If any of this information is not available, write **NONE**
Conducting Inventory

- If Asset is not found check “NO” under the Found Status column
- **Requirements for all unlocated assets**
  - Exception/Disposition Reasons
    - Surplus, Transferred, Stolen, Cannibalized, Lost, etc.
  - Related Backup Documentation
    - Transfer #, memorandum, police report, RADP, etc.

**Surplused, Transfer #1234**
Asset Custodian Role

• Asset Custodians have the ability to edit a select number of fields for assets in UAccess Financial
  • Use the “Asset Edit” Document to make changes
    • Write eDoc number from Financials on the report next to the corresponding asset to indicate the change has been made
  • Property Management will make necessary corrections if the department has not done so
• Contact Property Management to update (add/remove) someone as an Asset Custodian
How to Edit Assets

- Log in to UAccess Financials
- Open the Side Bar on the Left
How to Edit Assets

Click Here To Open in a New Tab (View Only)

Click Here To Open Asset Edit Screen
Asset Edit Document
On Campus Location: Valid Buildings and Rooms

• Make sure building and room numbers are active in UAccess Financials.
• Real Estate Admin (REA) valid room numbers are marked above the door in the center of the door frame
• If room numbers do not match what is in the system or do not exist
  • Contact REA 621-1813
• Do not write the names of conference rooms or atriums on the reports
  • It must be a valid REA building and room number.
Tools for Valid Locations

- Floorplans of Campus Buildings from REA
- Real Estate Administration Website
  - [http://www.pdc.arizona.edu/default.aspx](http://www.pdc.arizona.edu/default.aspx)
  1. Click “Space” on Main page
  2. Click “Building Information & Floorplans”
  3. Type in Building Name, Number, Abbreviation, or Address into search bars & hit Enter
  4. Click “Interactive Floorplan Viewer” or “CAD/PDF Floorplans”
  5. Sign-in with NetID & Password
  6. Select building-floor you would like to see
Space Planning & Management provides floor plans in CAD and PDF format for University Personnel. A UA NetID is required for access.
Tools for Valid Locations

• Use REA’s Website to look for a building Number
  • http://www.pdc.arizona.edu/default.aspx
    1. Click “Space” on Main page
    2. Click “Building Information & Floorplans”
    3. Scroll down until you see Complete Building Indices (Excel Format)
       a. Building Indices by Building Address
       b. Building Indices by Building Number
       c. Building Indices by Building Name
Tools for Valid Locations

Additional Floorplans and Complete Indices

**ADDITIONAL FLOOR PLANS**
- Off-Campus Site Plans
- Restricted Floor Plans

**COMPLETE BUILDING INDICES (Excel Format)**
- Building Indices by Building Address
- Building Indices by Building Number
- Building Indices by Building Name

Indices Last Updated 12/10/2018

For more information call or email Jose Teran at 520-621-3850
“Not Found” / Unlocated Assets: Exception/ Disposition Reasons

- Property Management
  - Interdepartmental Transfers
  - Cannibalized
  - Transferred Out
  - Returned to Vendor
  - Stolen
  - Lost
  - Trade-In

- Surplus Property
  - AssetWorks – Asset Management Platform (AMP)
    - Agency Sale
    - Auction Sales
    - Counter Sales (Public or Dept)
    - Recycled
    - Special Bid Sales
Interdepartmental Transfers

• DO NOT have to go through Surplus
• Notify Property Management and include the following:
  • Written confirmation (Email or Memo) from both departments accepting transfer
  • Tag Number(s)
  • Receiving Department Org Number
  • Receiving Department’s Account Number (not used to alter payments)
  • New Location (building & room)
Cannibalized

- Must get **prior approval** from Property Management to Cannibalize assets
  - Must notify Sponsored Projects Services if it is Sponsor Funded/Titled
- Asset is broken down into parts which are used to create other assets
  - Submit “Request for Authorization to Dispose of Property” (RADP) Form
    - Check “OTHER” box
      - Write CANNIBALIZED
    - Must be signed by the authorized signer for the department
    - Submit to Property Management
  - RADP Form
    - [http://www.fso.arizona.edu/sites/fso/files/2017-12/iAuthorization_to Dispose_of_movable_assets.pdf](http://www.fso.arizona.edu/sites/fso/files/2017-12/iAuthorization_to Dispose_of_movable_assets.pdf)
REQUEST AUTHORIZATION TO DISPOSE OF MOovable ASSETS

DEPARTMENT ___________________________ DEPT# ____________
BLDG _______ ROOM ________
CONTACT PERSON _______ TELEPHONE ________

Condition Codes
1-Excellent
2-Good
3-Fair
4-Major Repairs
5-Salvage

I confirm that the following conditions have been met:
• All sensitive data, including software, has been removed from computer equipment
• Equipment does not contain any radioactive materials, hazardous material, PCP, is not biologically contaminated, etc.
• The equipment is cleared of federal requirements and it can be disposed

Authorized Signature: ___________________________ Title: ___________________________

Check Appropriate Box:
☐ Turn into Surplus Property
☐ Trade-In to: ___________________________ ☐ Special Bid Sale
☐ Interagency Transfer to: ___________________________
☐ Other: CANNIBALIZED
☐ LOC ____________

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<th>Model Number</th>
<th>Serial Number</th>
<th>A-Tag Number</th>
<th>Acq Date</th>
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<th>Qty</th>
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☐ Approved ☐ Disapproved

Received By: ___________________________________________
Transferred Out Assets

- Federally Funded Equipment
- Following conditions must all be met for PIs to transfer equipment to another institution:
  - Equipment must have been purchased
    - Entirely* on sponsored accounts (3000000-4999999)**,
    - Obtained as government-furnished equipment,
    - Or purchased on restricted accounts (non-university funded)
  - Equipment must be used in the conduct of a research project
  - Equipment must be titled to an eligible institution
    - Property cannot be transferred to an individual or for-profit organization
  - Transferring researcher is the Principal or Co-PI on the sponsored grant or contract.

* Note: If equipment is split-funded with a UA account, it cannot be transferred, but must be sold via Surplus instead

** Note: This applies to Federally Funded equipment ONLY, not Federally Titled equipment
Transferred Out Assets

- Principle Investigator (PI) needs to submit **Memorandum of Request**
  - Memo *must* include the following information:
    - Reason for transfer
    - Name of new institution
    - Name and address of new institution’s Property Administrator
    - Date items are to be shipped
    - List of assets to be transferred*
  - Memo *must* be signed and approved by:
    - PI
    - Department Head
    - Dean, Vice-President for Research
    - Sponsored Project Services (SPS) Property Administrator

* Note: It is recommended that departments allow SPS to review the list prior to obtaining signatures to ensure transfer eligibility
Returned To Vendor

• If equipment was returned to the vendor, a refund will be reflected on your department’s account
  • Note the eDoc number of the refund in UAccess Financials on the inventory report
  • Include shipping documents/tracking number for when the asset was sent back to the vendor
Stolen

• Submit: Police Report and Property Loss Loss Form
  • Only Submit to Risk Management ONLY IF an Insurance Recovery Claim will be made

• Property Insurance Claim Information:
  • [http://risk.arizona.edu/insurance/property](http://risk.arizona.edu/insurance/property)

• Property Loss Form:
  • [http://risk.arizona.edu/sites/risk/files/propertylossform.pdf](http://risk.arizona.edu/sites/risk/files/propertylossform.pdf)

• Auto Loss Insurance Claim Information:
  • [http://risk.arizona.edu/insurance/vehicle/auto-loss-claims](http://risk.arizona.edu/insurance/vehicle/auto-loss-claims)

• Auto Loss Form:
**UNIVERSITY CLAIM #**

**ARIZONA DEPARTMENT OF ADMINISTRATION**

**RISK MANAGEMENT SECTION**

**PROPERTY LOSS REPORT**

---

**AGENCY**
U of AZ

**DIVISION**

**SECTION**

**AFIS MAILCODE**

**RMS NO. (FORMS USE ONLY)**

---

This Report Involves: State Building, State Owned Property

Person To Contact - About incident:

Telephone Number:

---

**FACTS**

**Date of Loss:**

**Time:** a.m. p.m.

**Weather:**

**Location:**

**Description of Incident:**

Who Was Notified?

Name Address Telephone

---

**What Action Was Taken by the Agency Following Damage?**

---

**PROPERTY**

**Description of Property Involved:**

**Estimated Amount of Loss:**

---

**PARTY RESPONSIBLE FOR LOSS**

**Name (Individual or Firm):** That caused loss, if known

Address Phone:

---

**WITNESSES**

1) Name Address Phone No.

2) Name Address Phone No.

3) Name Address Phone No.

---

**POLICE REPORT**

**Agency**

**Officer and ID No.**

**Report No.**

---

**REMARKS**

Reported By Date

(Person Completing Report)

Authorized Supervisor Date

---

MAIL COMPLETED FORM TO: Risk Management, PO Box 210300, Tucson, Arizona 85721-0300 or FAX 621-3706

---

**STANDARD FOR REPORTING LOSSES OVER $10,000 IS ONE DAY AND TEN DAYS FOR ALL OTHER LOSSES. PREVENT PREJUDICING YOUR CLAIM, RETURN THE PROPERTY LOSS REPORT WITHIN THE STANDARD FOLLOW WITH SUPPORTING DOCUMENTS AS SOON AS POSSIBLE. IF YOU HAVE ANY QUESTIONS REGARDING THIS FORM CALL JOY BAIN 621-3482. PLEASE PRINT OR TYPE**

---

**FOR PROOF OF UNIVERSITY OWNERSHIP ATTACH AS MANY AS APPLY, AT LEAST ONE**

**ORIGINAL**

- [ ] PURCHASE ORDER
- [ ] INVENTORY RECORD
- [ ] GIFT REPORT
- [ ] OTHER RECORD

**NON-OWNED PROPERTY THAT THE UNIVERSITY IS RESPONSIBLE FOR UNDER WRITTEN AGREEMENT ATTACH AS MANY AS APPLY, AT LEAST ONE**

**ORIGINAL**

- [ ] LOAN AGREEMENT
- [ ] "ZERO DOLLAR" PURCHASE ORDER
- [ ] CONTRACT

**REPAIR OR REPLACEMENT IN EXCESS OF $100 ATTACH AS MANY AS APPLY, AT LEAST ONE**

**ORIGINAL**

- [ ] ITEMIZED ESTIMATE
- [ ] PURCHASE ORDER FOR NEW ITEMS
- [ ] VENDOR STATEMENT OF NON-SERVICEABILITY
- [ ] CURRENT CATALOG PAGE(S) WITH ACTUAL PRICES PAID

**ATTACH IF AVAILABLE**

- [ ] PHOTOS OF DAMAGE
- [ ] STATEMENT OF CAUSE OR CONDITION CONTRIBUTING TO LOSS
**UNIVERSITY CLAIM #**

**Arizona Department of Administration**

**RISK MANAGEMENT SECTION**

**AUTOMOBILE LOSS REPORT**

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<th>STATE AGENCY</th>
<th>Department</th>
<th>Division</th>
<th>Section</th>
<th>ATIS Mail Code</th>
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**LOCATION**

- Street Address
- Intersection No. and Mile Post No.
  - Intersection
  - Non-Intersection

**CITY**

- Inside
- Outside
- County
- Weather

**DATE OF ACCIDENT**

- Day of Week
- Hour
- A.M.
- P.M.
- No. of Vehicles Involved
- No. Persons Injured

**MOTOR VEHICLE INVOLVED WITH**

- 1. Pedestrian
- 2. Other Motor Vehicle
- 3. Other State Vehicle
- 4. Fixed Object
- 5. Other

**STATE VEHICLE**

- Year
- Make
- Model
- License No.
- State
- UA
- Motor Pool Vehicle?
- Vehicle No.
- Removed To
- Removed By

**DRIVER**

- Last Name
- First
- M.I.
- Point of Impact on Vehicle
- Est. Cost Repair
- Address
- City
- State
- Zip
- Phone(s)
- Job Classification
- Department/Division/Section
- Driver's License No.
- Exp. Date
- State

**VEHICLE**

- Year
- Make
- Type
- License No.
- State
- Vehicle No.
- Removed To
- Removed By
- Point of Impact on Vehicle
- Est. Cost Repair

**OWNER**

- Last Name
- First
- M.I.
- Address
- City
- State
- Phone(s)
- Insured By
- Driver's License No.
- Exp. Date
- State

**PROPERTY OTHER THAN VEHICLES**

- Name and Address of Owner of Property
- Est. Cost Repair

**INJURIES**

- Last Name
- First
- M.I.
- Address
- Phone(s)
- Description of Injury

**PORTANT: DESCRIBE HOW ACCIDENT OCCURRED:**

- Rough Diagram of Accident:
  - Show your car as 1.
  - Other car as 2.
  - As the collision occurred. Show and distance traveled before crash by solid line thus:
  - Then begin drawing of cars; third, positions and distances after collision. Show distance and direction traveled after crash by dotted line thus:
  - Sincerely certify that this is a true statement or the facts to the best of my knowledge and belief.

**Driver's Signature**

- Date
- Phone
- In Person
- Mail

**VISOR NAME (Print or Type) (INT) PHONE # DATE**

**MAIL COMPLETED FORM TO: Risk Management, PO Box 210300, Tucson, Arizona 85721-0300 or FAX 626-0905**
Trade-In

• Trade-Ins do not go through Surplus
• Include Tag number(s) on Purchasing document (Requisition) & any backup documentation to support the trade-in
  • Make sure trade-in value is clearly indicated
• Property Management will retire the Traded-In asset and assign a tag to the newly purchased asset
Lost/Unable to Determine

• Equipment that cannot be physically located AND lack proper disposal documentation can be marked as: “Lost”

  • Property Management will change the Status code from A (Active and Identifiable) to L (Lost)
  • Asset will remain on department’s inventory until fully depreciated OR deemed lost for two consecutive years
  • Sponsored Project Services must be notified immediately if a Federally or Sponsor Titled asset cannot be found
    • These cannot be changed to “L” in the system
Lost/Unable to Determine Criteria

- If an individual asset or entire department’s inventory meets one or more of the following criteria listed below, a memo **must** be submitted and signed by Department Head as to why asset(s) cannot be located

  - A Lost asset with a Net Book Value of $10,000 or more
  - A Lost asset purchased within the last 18 months
  - 10% of department’s assets listed on inventory are marked Lost
  - Total Net Book Value of Lost assets add up to more than $50,000
Surplus Property: AssetWorks – Asset Management Platform (AMP)

• Implemented a new Surplus System

• Access: log in with NetID & Password
  • Contact Surplus Property at 621-1754
    • If Responsible for multiple departments
    • To learn how to schedule training
Surplus Property: AssetWorks – Asset Management Platform (AMP)

• All assets (except for Sponsor Titled) are loaded into AMP
• Assets need to be “Transferred to Surplus” by submitting a Transfer Request in AMP
  • Assets are no longer Transferred to Surplus in UAccess Financials
  • Instead the ‘Asset Status Code’ is changed
    • Capital Asset: A → 1
    • Non-Capital Asset: N → 2
• When assets are sold, Property Management retire them in UAccess Financials
  • Capital Asset: A or 1 → R
  • Non-Capital Asset: N or 2 → O
Inventory Summary

• Be **SPECIFIC & LEGIBLE** when noting corrections on inventory reports
  - If reports are messy or have irrelevant notes, then submit a clean copy to Property Management
  - Unrelated notes may prolong processing time & cause inaccurate information to be entered into UAccess Financials
• Check “Yes” or “No” for **every** asset so we know they were inventoried
• Attach **back-up** for **all** unlocated assets
• Make sure **every** asset has a legible property tag attached
  - Note on inventory sheets for replacement tags
  - Necessary for Assets Turned into Surplus
    - If assets get sent to Surplus without a tag, they may not be removed from your inventory
Submission of Inventory Report

- Each department MUST SUBMIT all of the following:
  - Completed Inventory Report(s) with corrections
    - If reprinted, must submit the 2019 Capital Physical Inventory report from UAccess Analytics
    - Sorted by Department & IU not by Building & Room
    - Printed as Single-Sided PDF with Landscape orientation
  - Signed Inventory Certification Statement
  - Any Back-up and completed Forms
    - RADP form, Surplus, Off campus location, etc.
- Deadline: **Tuesday, April 23rd, 2019 by 5:00pm**
Final Thoughts

Information and Materials discussed at this meeting can be found on FSO Capital Finance Website:

https://www.fso.arizona.edu/capital-finance/inventory

Feel free to contact any of our Property Management team or Sponsored Projects Services members.

We are here to HELP you!!!
Questions?