

**Plant, Property and Equipment Procedure
Equipment Relocations
Effective: April 2008**

Overview

This procedure describes steps necessary to be taken to ensure that the relocation of equipment is properly authorized and accurate records are maintained.

Responsibilities:

Schools/Centers

Senior Asset Administrator (SAA) - The SAA is responsible for ensuring that the School/Center is properly updating BEN Assets for relocations of assets and for maintaining proper documentation supporting such relocations.

Asset Administrator – The Asset Administrator (AA) is responsible for updating BEN Assets for changes in locations as well as for completing/maintaining the “Home Use/Remote Location” and “Equipment Change” forms. The AA is also responsible for generating the Relocation Report in order to verify that the location change was properly recorded in BEN Assets.

Tagging Contact (TC)/Custodian – The TC or Custodian is responsible for notifying the AA in writing of the location or Responsible ORG change.

Custodian - The Custodian is responsible for notifying the AA in writing of the location or Responsible ORG change for equipment for which he/she is responsible. The Custodian is also responsible for completing the “Home Use/Remote Location” form for any equipment he/she will use at home, for obtaining the necessary approvals and for forwarding the approved form to the AA to update BEN Assets.

Department Chair, Director or Senior Business Administrator (Senior BA) – the Department Chair, Director or Senior BA is responsible for approving the removal of any equipment from on-campus to an off-campus location.

Business Procedure

1. Relocation of Equipment

The School/Centers may on occasion move equipment from one location to another and/or between Responsible ORGs within their School/Center, in accordance with their business needs.

- a. When these relocations and/or transfers occur, the appropriate TC or Custodian is responsible for notifying the AA of the location change and/or the Responsible ORG change so the AA may update this information in BEN Assets. The TC or Custodian will also notify the AA of any corresponding

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changes in Custodian or Tagging Contact related to the relocation, as well as the respective phone number changes. This notification should be made **in writing**, via e-mail or in memorandum format, to document the change(s) requested.

- b. Upon notification of the change, the AA will update the relevant information in BEN Assets and notify the requestor that the change has been made. The TC or Custodian requesting the change should review the Report of Location Changes to verify that the change has been made correctly.
2. Home Use or Remote Location

On occasion, an employee may be required to use University-owned equipment at home or at a remote, off-campus location, such as overseas. In these instances, removal of the asset from the University must be authorized.

- a. The requesting Custodian must complete the “Home Use/Remote Location” form and obtain the approval of the Department Chair, Director or Senior BA.
- b. Once the form has been approved, the Custodian should maintain a copy for his/her records and should forward the original to the AA. The equipment may now be physically removed from the University premises by the Custodian.
- c. The AA updates BEN Assets with new location:
 - i. For Home Use equipment, the location is 7012-N/A-N/A
 - ii. For Remote Location equipment, the location is 7023-N/A-N/A
- d. The AA also updates any other necessary information, including changes to Custodian, Custodian Phone Number, Tagging Contact, Tagging Contact Phone Number, and Responsible ORG
- e. The AA should maintain the original form until the item is returned or disposed, in accordance with the University’s record retention policy.
- f. When the equipment is returned to the University, the Department Chair, Director or Senior BA should complete and sign the return section of the “Home Use/Remote Location” form to acknowledge return of the equipment. A copy of the signed form should be provided to the employee returning the equipment for his/her records. The form should then be forwarded to the AA to update the location in BEN Assets for the on-campus location of the asset as well as any changes required to the Custodian and TC.

Please note: In instances where the equipment is originally shipped to the remote location, the shipping address, as well as the remote location entered in the property information form of the requisition, authorized in the purchase order, serves as authorization of the remote location and a “Home Use/Remote Location” form does not need to be completed. The remote location will be entered by the PMG upon creation of the asset in BEN Assets.

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3. Transfer Between Schools/Centers

- a. The AA from the sending School/Center should complete the Equipment Change form and have it approved by the Senior BA of his/her School/Center.
- b. The AA should then have the form approved by the Senior BA of the receiving School/Center who must also complete the new location and Responsible ORG information.
- c. Once the form is completed and all approvals have been obtained, the equipment is then physically moved to the new location.
- d. The AA of the sending School/Center will review the form and update BEN Assets with the new location, Custodian, Tagging Contact and the Responsible ORG, as appropriate.
- e. If the receiving School/Center is “purchasing” the equipment from the sending School/Center, the sending School/Center should record a funding transfer in the G/L using object code **4826 Equipment Close-out** to debit (charge) the receiving School/Center and credit the sending School/Center. The journal batch name to record the transfer should be notated on the Equipment Change Form.
- f. A copy of the completed Equipment Change Form should be forwarded to the receiving School/Center. Copies of the form should be maintained by the School/Center in accordance with the University’s record retention policy.
- g. The AAs of both Schools/Centers should review the Report of ORG Changes to verify that the change(s) has been made correctly.

4. Reports

- a. Periodically, but at least once a month, the AA will run the “Asset Change History” standard query in Business Objects to determine that all location changes within his/her School/Center are authorized and that all authorized location changes were properly made.
- b. Periodically, but at least once a month, the AA will run the “Asset Change History” standard query in Business Objects to determine that all location changes within his/her School/Center or between his/her School/Center and another School/Center are authorized and that the authorized ORG changes were properly made.