



The University of Texas at Austin

Inventory Removal Request Instructions

IMPORTANT: Approval must be obtained before any item is removed from the University.

Due diligence requires thorough documentation and proper procedure. Please read instructions carefully.
Failure to follow instructions may result in processing delays.

1. **Date:** Write the date on the appropriate line. This date will be referenced in all communications with Inventory Services regarding the request, so please make note of it.
2. **Department name and unit code:** Fill in your department name and the 7-digit unit code that the equipment belongs to. This information can be found on the NV1 screen in *DEFINE.
3. **Equipment to be removed:** Fill in the inventory number, element number, account number, ownership code (University, Federal, or Pivate), equipment description, acquisition date, historical cost, and depreciated value of the equipment in this section. For items with multiple elements, list each item on a separate line. This information is available from *DEFINE's NV1, screen number 1. For capitalized items, the depreciated value will also be listed on NV1 screen 1; however, the depreciated amount for all controlled items is **not** listed on this screen. A depreciated value for controlled items can be calculated with a straight-line depreciation method* using the useful life of the equipment and the historical cost, both found on NV1 screen 1.

*The formula for calculating straight-line depreciation is historical cost divided by useful life (in days) times number of days between acquisition date and the date you are submitting the request. For a depreciation template, go to http://www.utexas.edu/business/accounting/pubs/depreciation_calc.xls.

4. **Reason for request: A letter of justification on department letterhead, stating the circumstances and reason for the removal, must accompany all requests.** For federally-owned items, if available attach documentation that includes sponsor approval allowing for the item or project to be transferred to a Texas state agency or institution, along with the letter of justification. Supporting materials for the following types of requests must also be included:

Stolen: Stolen property must be reported to the proper police authorities within **48** hours of identifying a theft of inventoried property has occurred. A copy of the filed official police report must accompany the letter of justification and form to be sent to Inventory Services as soon as the police report has been obtained and should not exceed **48** hours after the incident. See Handbook of Business Procedures 16.3 Section F. Lost or Stolen Property: http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html. Within the letter of justification, you must include if the stolen item was or was not due to employee negligence. **Also, if the stolen item is a computer or laptop, answer these two questions in the letter of justification:**

1. Did the computer contain any Category I data?
2. Was the computer encrypted?

In addition, stolen computers or laptops must be recorded on the Information Security Office (ISO) Stolen Equipment Report form located here: https://security.utexas.edu/violation/iso_theft_form/.

Cannibalized: If there are going to be any remaining parts from the cannibalization, a CCART electronic transfer document must be created to send the spare parts to Surplus 4500-999. To access CCART, go to <https://utdirect.utexas.edu/acct/inv/ccart/index.WBX>. If all of the pieces will be used when the item is cannibalized, the Inventory Barcode Tag should be removed and attached to this form. Approval through Inventory Services prior to the item being cannibalized is required for all federally-owned property purchased on sponsor funded contracts and grant accounts regardless of depreciated value and is required for university-owned property with a depreciated value above \$0. Prior approval is **not** required on university-owned property with a depreciated value of \$0.

Donation: For any items donated outside of Surplus, approval must first be requested through Inventory Services **before** physical removal of donated items, and items should be donated to a qualifying non-profit political subdivision. Only other Texas state agencies, public schools, school districts, or assistance organizations listed as qualified by the Texas Facilities Commission (TFC) will be approved: <http://portal.tfc.state.tx.us/surplus/state/tbassistanceorganizations.asp>. Organizations may apply for qualified status at the TFC website: <http://www.tfc.state.tx.us/divisions/supportserv/prog/statesurplus/political-subdivisions-and-non-profits/assistance-organization-eligibility.html>.

Further, priority must be given to public schools, school districts, or assistance organizations designated by a school district for donations of equipment with instructional value.



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Due diligence on this requirement can be accomplished by making the items available on the Higher Education Coordinating Board's website for 30 days. Posting to this website is handled through Surplus Property:

<http://www.utexas.edu/facilities/services/surplus.html>. Verification that this step has been completed must be provided in the letter of justification, if items with instructional value are being offered to organizations other than public schools, school districts, or assistance organizations designated by a school district.

Technology equipment not claimed by public schools, school districts, or assistance organizations designated by a school district will be sent to the Texas Department of Criminal Justice (TDCJ). Transfer of technology equipment to TDCJ is handled through Surplus Property.

After approval is granted, Inventory Services will need a copy of a signed letter from the receiving organization verifying that the equipment was received. Items will remain in the department inventory listing until this confirmation is received.

Sale/Sealed Bid/Auction: This option is only available for units that cannot dispose of equipment through Surplus Property because of location, shipping cost, or other extraordinary circumstances. **For any sales made outside of Surplus, prior approval must be requested through Inventory Services before selling.** After approval is granted, Inventory Services will need documentation of the amount of the sale for each item and deposited funds, such as relevant screen prints from *DEFINE before the item can be removed from the department inventory listing. For information on sale of restricted equipment, see Handbook of Business Procedures 16.3 C. Sale of Equipment: http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html.

PI Transfer or transfer to a Non-Texas State Agency: Principal Investigator (PI) may take equipment acquired through contracts or grant funding. All other equipment is subject to the rules and regulations based on funds used to purchase equipment. Transfers to a non-Texas state agency require a written acceptance agreement from the receiving institution. See Handbook of Business Procedures 16.4 Section E. Equipment Acquired under Federal Research Grants: http://www.utexas.edu/business/accounting/hbp/16_inv/inv4.html.

Transfer to Another Texas State Agency: Do not use this form. Instead, use the Property In-coming Transfer form (http://www.utexas.edu/business/accounting/pubs/property_transfer_receipt_incoming.pdf) or Property Outgoing Transfer form (http://www.utexas.edu/business/accounting/pubs/property_transfer_receipt_outgoing.pdf).

Trade-In: Attach a copy of the purchase order or trade-in payment document showing the detailed information along with the trade-in dollar amount. When available, include inventory number of new item(s) purchased with traded-in item. Also, trade-ins are not warranty replacement items.

Returned to sponsor: Items purchased with federal or private funds that were returned to the sponsor should include a letter of justification and shipping documents if available.

Salvaged: All equipment that has become obsolete to the department should go to Surplus Property regardless of how it was tracked. **Do not throw away any equipment.** See Handbook of Business Procedures 16.3 Section E. Equipment to be Discarded: http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html. Use CCART to transfer items to surplus: <https://utdirect.utexas.edu/acct/inv/ccart/index.WBX>.

5. **Department Signatures:** Both the department chair and the department inventory contact should print and sign their names at the bottom of the form.



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Reminder: Make sure each step is complete before submitting the Inventory Removal Request Form (IRR).

Checklist:

- ☐ Each item listed includes the inventory number, element number, account number, ownership code, equipment description, acquisition date, historical cost, and depreciated value.
- ☐ The form is signed by the department chair and inventory contact.
- ☐ The letter of justification is attached.
- ☐ Appropriate documentation is attached:
 - ☐ Stolen
 - ☐ Include a copy of police report.
 - ☐ Justification letter states stolen item is due or not due to employee negligence
 - ☐ If the item stolen is a computer or laptop, these two questions are answered in the letter of justification:
 - 1. Did the computer contain any Category I data?
 - 2. Was the computer encrypted?
 - ☐ Stolen computers and laptops must be recorded on the Information Security Office (ISO) Stolen Equipment Report form located here: https://security.utexas.edu/violation/iso_theft_form/
 - ☐ Cannibalized – If federally-owned equipment, prior approval required
 - ☐ If items are left over, create an NT1 document using CCART to send to Surplus. No IRR form is needed.
 - ☐ If all parts are used and no left over items were sent to Surplus, attach inventory tag to letter of justification.
 - ☐ Donation – If not through Surplus, prior approval required
 - ☐ Include the organization's Texas Facilities Commission (TFC) certificate unless it is donated to a public school or a school district.
 - ☐ Sale/Sealed Bid/Auction – If not going through Surplus, prior approval required
 - ☐ Include an agreement of sale if available
 - ☐ Copy of receipt of funds, such as copy of check, and document ID# of deposit into departmental account in *DEFINE
 - ☐ PI transfer or Transfer to a Non-Texas State Agency – Prior approval required
 - ☐ Include supporting documentation needed to meet contract requirements
 - ☐ Transfers to another Texas State Agency- Prior approval required
 - ☐ Do not use IRR form. Instead, use the Property In-coming Transfer form (http://www.utexas.edu/business/accounting/pubs/property_transfer_receipt_incoming.pdf) or Property Outgoing Transfer form (http://www.utexas.edu/business/accounting/pubs/property_transfer_receipt_outgoing.pdf).
 - ☐ Trade-in
 - ☐ Include copy of purchase order showing details of trade-in
 - ☐ Include inventory of new item purchased from trade-in
 - ☐ Returned to Sponsor
 - ☐ = Copies of shipping documents if available
 - ☐ Salvaged – If not going through Surplus, prior approval required
 - ☐ No IRR is needed if CCART was used to send it to Surplus.
 - ☐ If not sent to Surplus, IRR form required with justification letter
 - ☐ Other – Prior approval may be required
 - ☐ Consult directly with Inventory Services to determine what documentation is needed.
- ☐ Technology items have been cleaned using a low-level format and verification is included with the request.



The University of Texas at Austin Inventory Removal Request Form

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Due diligence requires thorough documentation and proper procedure. Please read instructions carefully. Failure to follow instructions may result in processing delays. By signing below you are acknowledging that all information contained in this request is accurate and due diligence in following policies and procedures has been done.

Date: _____

Instructions: Complete and **attach supporting documentation** and a **letter of justification**. Send this form and the supporting materials to Office of Accounting, Inventory Services, at campus mail code K5306.

1. Department name and unit code: _____

2. Equipment to be removed:

(If more space is needed, continue on separate page. Include and complete all columns.)

Inventory Number	Element Number	Account Number	Ownership	Description	Acquisition Date	Historical Cost	Depreciated Value

3. Reason for request:

(See Inventory Removal Request Instructions for further details.)

☐ Stolen

☐ Cannibalized

☐ Donation

☐ Sale/Sealed Bid/Auction

☐ P.I. Transfer or transfer to non-Texas State Agency

☐ Trade-In

☐ Returned to sponsor

☐ Salvaged

☐ Other

4. Department Signatures:

Dept. Chair Signature

Dept. Chair Printed

Dept. Inventory Contact Signature

Dept. Inventory Contact Printed

Approval Signatures:

OA Inventory Supervisor Signature

OA Inventory Supervisor Printed

OA Property Manager Signature

OA Property Manager Printed

For Inventory Services Use Only

Request number: _____ Received _____

Denied: ☐ Date: _____ Denial Initials: _____

Reason: _____

Form IRR-F, Revised 1/31/2014