



# 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:** Please 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 seven-digit unit code that the equipment belongs to. This information can be found in the **NV1** screen in \*DEFINE.
3. **Equipment to be removed:** Please fill in the inventory number, element number, account number, ownership code (University, Federal, or Private), 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. Go to [http://www.utexas.edu/business/accounting/pubs/depreciation\\_calc.xls](http://www.utexas.edu/business/accounting/pubs/depreciation_calc.xls) for a depreciation template that you can use.

4. **Reason why removal is requested:** A letter of justification on department letterhead, stating the circumstances and reason for the removal, must accompany all requests. Supporting materials for the following types of requests must also be included:

**Stolen Items:** Stolen property must be reported to the proper police authorities within **48** hours of identifying a theft of personal property has occurred. A copy of the official police report that is filed must accompany the letter of justification and form to be sent to Inventory 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](http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html)

**Cannibalized:** If there are going to be any remaining parts from the cannibalization, a CCART electronic transfer document should 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. Prior approval is required for all federally owned property and university owned property valued above \$0. Prior approval is NOT required on university-owned property with a depreciated value of \$0.

**Donation:** For any donations done outside of Surplus, approval must first be requested and items should be donated to a qualifying non-profit political subdivision. Only other state agencies, public schools, school districts, or assistance organizations listed as qualified by the Texas Facilities Commission will be approved. Organizations may apply for qualified status at the TFC Web site: <http://www.tfc.state.tx.us/communities/supportserv/prog/statesurplus/political-subdivisions-and-non-profits>.

Further, priority must be give to public schools, school districts, or assistance organizations designated by a school district for donations of equipment with instructional value. Equipment with instructional value includes technology equipment, such as computers or projectors, athletic equipment, musical instruments, etc. Due diligence on this requirement can be accomplished by making the items available on Higher Education Coordinating Board's Web site for thirty days. Posting to this Web site is handled through Surplus Property. 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. Transfer of technology equipment to TDCJ is handled through Surplus Property.

**Note:** Donations to state agencies require a written acceptance agreement from the gaining agency, and "Transfer to another state agency" should also be marked and the agency number included on the Inventory Removal Request Form.



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After approval is granted, inventory 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.

**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 done outside of surplus, approval must be requested before selling. After approval is granted inventory will need documentation that funds have been deposited, 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](http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html)

**PI Transfer:** Principal Investigator 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. PI Transfers to Texas state institutions require a written acceptance agreement from the gaining institution, and "Transfer to another state agency" should also be marked and the agency number included. See Handbook of Business Procedures 16.4 Section E. Equipment Acquired under Federal Research Grants.  
[http://www.utexas.edu/business/accounting/hbp/16\\_inv/inv5-4.html](http://www.utexas.edu/business/accounting/hbp/16_inv/inv5-4.html)

**Transfer to another state agency:** Items being sold or donated to another state agency should include a letter of justification and written acceptance agreement from the gaining institution. The agency's name and their State Property Accounting agency number should be listed on the appropriate line of the Inventory Removal Request Form.

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

**Salvaged:** All equipment that has become obsolete to the department should go to Surplus Property whether tracked on \*DEFINE or not. No equipment should be thrown away. See Handbook of Business Procedures 16.3 Section E. Equipment to be Discarded  
[http://www.utexas.edu/business/accounting/hbp/16\\_inv/inv3.html](http://www.utexas.edu/business/accounting/hbp/16_inv/inv3.html). Transfers to surplus must be done using the CCART system available at <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.

**Important:** *Items sent to Surplus without using CCART can only be removed if Surplus can verify receipt of the item. If an item is missing, or its removal cannot be substantiated with appropriate documentation, the item should be marked as missing in the NV1 screen of \*DEFINE. This begins a countdown that will programmatically remove the item two years from the date that the item is marked as missing. If the item is later found, its status can be updated in \*DEFINE. Items can only be removed with appropriate justification and documentation.*

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

- 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 police report
  - Cannibalized - Create an NT1 document using CCART if are items left over. No IRR is needed.  
OR inventory tag, if all parts are used
  - Donation - Include the organization's TFC certificate unless it is a public school or a school district.
  - Sealed bid/auction - Include an agreement of sale if available
  - PI transfer - Include documentation needed to meet contract requirements
  - Salvaged – No IRR is needed - use a CCART and send it to Surplus.
  - Other - Include as much documentation as possible to verify all aspects of the removal
- 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

**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. 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, 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
- Cannibalization
- Donation
- Sale/Sealed Bid/Auction
- P.I. Transfer

- Transfer to another state agency  
Agency Name \_\_\_\_\_  
Agency # \_\_\_\_\_
- Returned to sponsor
- 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: \_\_\_\_\_