

# Excess Property Form to DocuSign

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MAY 23, 2022

LINK TO RECORDING: [HTTPS://VIMEO.COM/714171441/4184AA0FC0](https://vimeo.com/714171441/4184AA0FC0)

# Agenda

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Who should use this form?

What's changed?

Why the switch?

Next steps for the users filling out the form

Demonstration

Opportunity for Q&A

# Who Should Use This Form?

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Anyone who is trading in, donating, planning to sell, disposing of, or otherwise removing University property.

- Capital Assets = property that is valued at \$5,000 or more such as medical instruments, lab equipment
- Non-Capital Assets = all other property valued under \$5,000 such as office furniture, medical equipment

**NOTE:** IT equipment/electronics that contains data will still be processed through CITS. Please contact the [appropriate authorized user](#) within your department.

**NOTE:** Transfer of a capital asset to a different department requires a different process. A [Capital Transfer Form](#) is to be filled out and forwarded to General Accounting.

# What's Changed?

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Using DocuSign Portal instead of the PDF form to fill out the Excess Property Declaration/Capital Asset Deletion Form

- Interactive form that includes: drop-downs, prompts for required documents, and digital signatures

Website updates to the [Surplus Property Page](#)

**Excess Property Declaration/Capital Asset Deletion Form**  
(Capital, Non-capital and Fixed Assets or Supplies and Materials)

**NOTE:** This form **cannot be used** for assets that store data. Media that contains data must be disposed via the [Media Disposal System](#) in accordance with [UMB Policy X-99.08\(A\) on Disposal of Media Containing Data](#) and Financial Services Procedures on [Capital Asset Management](#) and [Noncapital Assets](#).

1.	Capital Asset	<input type="checkbox"/> Yes <input type="checkbox"/> No	Non-Capital Equipment	<input type="checkbox"/> Yes <input type="checkbox"/> No
Tag Number		School Name		Dept Code
2.	Hazardous or radioactive waste		<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, item must be cleared by EHS and tagged before removal.
Purchased with external (sponsored) funds? If yes, item must be cleared by ORD Sponsored Program Administration.				<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	Description of Property:			
a.	Manufacturer	b.	Model No.	
c.	Serial Number	d.	Year purchased	
e.	Original cost	f.	Original fund source	
g.	Estimated value	h.	Asking price	
4.	Condition			
<input type="checkbox"/> Suitable for use, as is <input type="checkbox"/> Suitable for use with minor repairs <input type="checkbox"/> Scrap for disposal (cleared by EHS & FS, if required)				
5.	Present location of property (building, floor, room #)			
6.	If sold, credit funds received to:			
Project	PCBU	Fund	Program	Dept
ACCT				
7.	Institutions, organizations or individuals (non-state employees) that might be interested in item:			
8.	Arrange for commercial storage of property?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
NOTE: Custodial department will be required to pay for storage costs.				
9.	Assistance by General Services desired for disposal of surplus?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
10.	Check the appropriate box below that indicates the reason for disposal.			
	Description	Documentation Required		
	Trade In	Copy of approved requisition/PO indicating trade-in.		
	Inventory Write-Off	Missing on Inventory – Letter stating it was not found during subsequent investigation by the Chairman.		
	Discarded as Unserviceable	Documentation that the asset is unserviceable. If no documentation is available, please provide explanation below:		
	Stolen	Must attach a copy of police report filed on asset.		
	Taken with Researcher	Written permission of Department Chairman, Dean, & ORD Sponsored Program Administration.		
	Donated to Non-Profit Charitable Organization	Donations to Non-Profit Org. must have prior approval from the UM Surplus Property Officer.		
	Sold	Pending documentation from Surplus Property Officer.		
	Other	Attach appropriate documentation.		
Individual Completing Form (Print Name)		Date	Department Head Approval Signature	Date

**Excess Property Declaration/Capital Asset Deletion Form**  
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**DO NOT WRITE IN SECTION BELOW**

Received by		
	General Accounting Signature	Date

Surplus Property Control Number:	
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**Disposal Authorization:** The excess property above has been declared surplus and approval for disposal as follows:

<input type="checkbox"/>	Disposal as scrap is authorized and General Services will coordinate movement of property with department.
<input type="checkbox"/>	Used as Trade-In for new purchase.
<input type="checkbox"/>	Sold Public Auction or Bid Solicitation by Surplus Property Office.
<input type="checkbox"/>	Documentation/Copy of check for Property Sold has been forwarded to Financial Services – General Accounting.
<input type="checkbox"/>	Property Donated to Non-Profit Charitable Organizations or Local Subdivisions.

SEND THIS FORM WITH APPROPRIATE DOCUMENTATION TO:	
General Accounting Department of Financial Services The Saratoga Building 220 Arch Street, Room 02-125 Baltimore, MD 21201	
Surplus Property Office Approval Signature	
Name (Please print/type)	
Title	
Date	



**Administration and Finance**  
**Excess Property Declaration/Capital Asset Deletion Form**  
 (Capital, Non-capital and Fixed Assets or Supplies and Materials)

This form can be found on the [Surplus Property page](#) (Click Here) .  
 Please email [surplus property email] with any questions regarding the completion of this form.

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Contact Name	Angela Ober	Contact Email	aober@umaryland.edu	
School/Department		Department Code		
Location		Control Number (Assigned by Surplus Property Manager)		
Capital or Non-Capital Asset?	-- select --	Hazardous or Radioactive?	-- select --	If Hazardous/Radioactive, complete <a href="#">Equipment Clearance Form</a> and attach. (Click Here)

Reason for Removal	-- select --	
If trade in, attach copy of approved requisition/PO indicating trade in.		If donated, please complete Certification Statement (Click Here)  and attach.
If missing on inventory, attach letter stating it was not found during subsequent investigation by the Chairman.		If disposed of, documentation that the asset is unserviceable. If no documentation is available, please provide explanation.
If stolen, attach copy of police report.		If taken with researcher, attach written permission of Department Chairman, Dean, & ORD Sponsored Program Administration.
If to be sold, enter SOAPE.		



**Administration and Finance**  
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Description of Item(s)			
Name of Equipment (Model No. if Applicable)	Serial No.	Asset Tag No.	Functional?

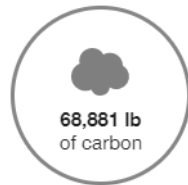
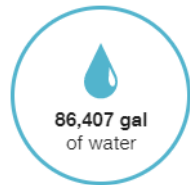
Attach list if more than 5 items.



Department Administrator Signature		Date	
Surplus Property Manager Signature		Date	
General Accounting Signature (If Capital Asset)		Date	

# Why the Switch?

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## Helping the Planet and Your Bottom Line

Paper based processes don't just cost you time. They can have significant environmental impact. We're committed to helping both.

[Learn More](#)

## Streamlining the Process

- Routes the form to the proper responsible parties with minimal printing, scanning, and emailing.

## Allows for Better Organization

- All signing parties receive a copy of the completed document.

## Easier to Fill Out

- Revised format that removed unnecessary fields and allows for a better user experience when filling out the form.

## Better for the Environment

# Next Steps

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Use the following link to access the DocuSign version:

- <https://powerforms.docusign.net/f155b440-75da-44e7-a952-7948da405f3f?env=na3&acct=f779d0ec-0798-4308-920b-6ee2bfff1782>

Transition/"Grace" Period

- PDF forms will be accepted until July 1st for those who are not aware of the transition.

Website updates to the [Surplus Property Page](#)

- PDF is removed and replaced with [link to the new form](#)
- [FAQs](#) updated to reflect changes
- Resources will be added
  - [PDF procedures](#) for the DocuSign form
  - Slides and [recording](#) of demonstration



# Demonstration

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# Questions?

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