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Property Transfer screen

Overview
In an effort to make the process of asset transfer better for university departments, we have created the electronic transfer system. This will not only eliminate paper but will improve the time needed to process a request through the system.

In addition to transferring assets with a permanent property tag (PTAG) to another organization or location, you should also use the property transfer application if you are sending assets to Surplus Property or requesting that Facilities assist with the transfer of assets. All requests for transfers, with or without property tags, should be requested in the Property Transfer application. If you are transferring an asset that is not tagged and does not require any Facilities or Surplus Property services you do not need to fill out a request. Users will be notified via email when they need to approve a request and when their request is complete.

The Property Transfer form allows you to transfer Tagged and non-Tagged Assets. There are five options,

1) Change Location Room and/or Building
2) Transfer property to another Organization
3) Relieve property from responsibility/accountability
4) Surplus Service
5) Review/Search Request

Uses of options:

Option 1) Change Location room and/or building if your organization will maintain financial responsibility for the asset but are changing the physical location of the asset.

Option 2) Transfer property to another Organization if your organization will not maintain financial responsibility for the asset even if the asset stays in the same location.

Option 3) Relieve property from responsibility/accountability if the asset is lost, stolen, destroyed or any other cause of complete loss.

Option 4) Surplus Service if you are dropping off or requesting pickup for non-tagged or tagged property that will be turned over to the Surplus Property group.

Option 5) Review/Search Request if you want to review previously reported transfer requests.
The transfer request will require approvals. The approvers in the requisition queues will be used for approval routing. Emails will be sent to the approvers automatically.

**Main Menu**

Select the change Location Room and/or building option from the main screen.

**Change Location Room and/or Building**
The organization(s) you have access to will default as a selection criteria in the Organization drop down box. Select the appropriate Organization codes from the drop down list.

Enter a reason for the transfer, then mark whether the asset is hazardous or needs Facilities pickup then select Next. After you select Next, a list of assets that you can select will be displayed. You have the option to enter your own description for assets not on the tagged list.
Select Assets to Transfer

Check the box next to the Permanent Property Tag (PTAG) for the asset you are transferring or enter the asset information in the box at the bottom of the screen. If you have selected the asset(s) for which you need to change locations, select Next. After you select Next, a new screen will allow you to enter the details on the new location.

If you selected the change location in error select Back to return to the main menu.
**PTAG Detail on Transfer**

**Fixed Asset Transfer for Property Services**

**Change Location: Room and/or Building**

Fill in the name of the Building and the Room number for the new location, then select **Next**.

You can select **Back** to change any details.

**Confirmation screen on Transfer**

Review the information on the confirmation screen. Confirm if the details are correct. When you Select **Confirm**, a pop up window will appear for you to select **OK** or **Cancel**.
You will see a message notifying you that the transfer request is processing and that you can add attachment’s the request when it appears on your list.
You can attach multiple files but you must add each file one at a time. You can add a number of formats including pdf, jpg, jpeg, gif, png, tif, tiff. The file size must be less than 5 mb.
Transfer property to another Organization
Select the Transfer to another organization from the main menu
The organization(s) you have access to will default as a selection criteria in the Organization drop down box. Select the appropriate Organization codes from the drop down list.

Enter the Reason for Transfer.

A new pop up will appear for you to enter the Organization that will accept the asset.
Enter the whole or part of the Department name click Go and new pop up list will appear. Select the Organization.

Select OK and then select the yes or no option for Location Change, Hazardous material and Facilities pickup arrangements.
Check the box next to the property tag, if you are transferring a tagged asset. If you are transferring an asset not on the list, fill in the fields on the bottom. If you click in the box and start typing another blank line will appear to add more assets.

Select Next when you have entered all of the assets to transfer.

**Building/Room screen**
Fill in the Building name and Room number, then select **Next**.

**Review/confirmation screen**

Review and Select **Confirm**. If there is something to change Select **Back** and alter the data.

If you selected Confirm a popup window will prompt you to select **OK** or **Cancel**
You can attach multiple files but you must add each file one at a time. You can add a number of formats including pdf, jpg, jpeg, gif, png, tif, tiff. The file size must be less than 5 mbp.
Your Transfer request is complete at this point.

Select Back to use another feature in the Property Transfer App or select any of the option(s) in blue at the bottom to go to any other option of Banner Finance.
Relieve property from responsibility/accountability

Select the Relieve property from responsibility/accountability.

This option is used if an Asset is traded-in, Lost, Stolen, Destroyed or other cause of complete loss.

You must attach the appropriate documentation, i.e police report on theft.
Select Reason for Relieve and enter a comment, then select Next to add a specific asset. The next screen will allow you to view a list of tagged assets to select or enter an asset.

Selection screen

Check the box next to the tagged asset. This option is only applicable for assets with Permanent Property tags.
Review and confirmation screen.

Review and Press Confirm

Confirmation Popup

Submit request. Are you sure?

Select **OK** to proceed or **Cancel** to return to review. After you Select **OK** your request is complete.

Select **Back** twice to return to the Property Transfer main menu. If you have completed your property transfer request you can select any option in blue at the bottom of the page.
The request is processing and will require that you attach documentation.
File Uploaded peaksicon.gif
Select Surplus Service. Use this option to transfer an asset to Surplus Property.
Complete Reason for Surplus from the drop down box. Fill in a detail/comment and select the appropriate option for Arrangements to pick up the property. If you select YES a box will be displayed for you to enter the FOAP for the Facilities charge.

Select **Next** to proceed.
Check the box next to the property tag from the list of tagged assets or enter the non-tagged item you would like to send to surplus. When you start typing in the data entry box another blank line will be added to enter the next asset.

Select Next

Confirmation screen
Confirmation popup

Review the information. If correct select Confirm. If you need to make changes select Back.

Select OK. Then select Confirm.

If you have selected no for pickup please take the asset to Surplus Property.

You will be allowed to attach files after you Select OK.
If you select the Review/Search Request you can see a list of Transfer request(s) in the system. You can review both previous and current Property transfer request(s). The current status is visible in the fourth column. Select Detail to see more information on the asset and the request.

On the main menu you can select **Review/Search Request** to see the status of your request and review any details.
## Selection Screen

**Fixed Asset Transfer for Property Services**

Select **Detail** to review current status and details of a transfer request.
The expanded Property Details screen will show the details associated with the transfer and the asset. You can see who has approved the asset and the approvals that are pending.

Select Back to return to the Property Transfer screen.
Approval

The approval process for the Property Transfer application will use the Requisition queue definition. When a transfer is pending your approval you will receive and email. See example:

1st notice to current owner of asset

![Image of first notice]

2nd notice to group receiving the asset

![Image of second notice]
3rd notice to processing the change requested