

The University of Alabama at Birmingham

Departments must complete an **Equipment Disposition Form** (EDF) and submit it to Asset Management for approval before taking any action regarding equipment *except Surplus*.

For Surplus, please use SPS.

All equipment disposals are reviewed with respect to original funding sources that may affect the disposition of the equipment. Follow the directions below to complete and submit an Equipment Disposition Form.

DETERMINING THE TRANSACTION TYPE	COMPLETING THE EDF	VIEWING EDFs IN ADOBE SIGN
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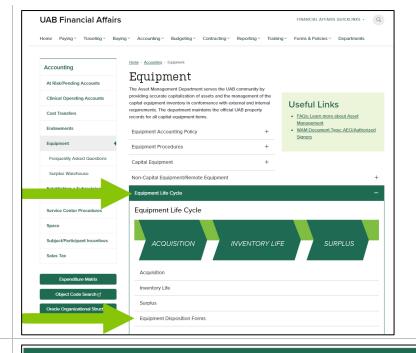
DETERMINING THE TRANSACTION TYPE

Before completing the Equipment Disposition Form, review important information about transaction types on the Financial Affairs website:

- Navigate to the <u>Financial Affairs</u> <u>Accounting site</u>.
- Click Equipment Life Cycle.
- Click Equipment Disposition Forms.

Determine the **transaction type(s)** for your equipment:

- Review the information provided for each type.
- Be prepared to provide the specific information/ documentation required for the transaction type(s) you will use for your equipment.
- Refer to this page to ensure the EDF includes all necessary details.



Equipment Disposition Forms

Departments must complete an Equipment Disposition Form and submit it to Asset Management for approval before taking any action regarding equipment. (For Surplus use SPS.) All equipment disposals are reviewed with respect to original funding sources that may affect the disposition of the equipment. If you have questions about Equipment Disposition Forms that are not answered in the information below, please contact Asset Management at <u>FA-ead@uab.edu</u> or (205) 934-5144.

The types of actions that should be reported on the EDF are explained below:

- Move/Transfer— Select this transaction type if equipment is moving to a different location or the owning department is transferring stewardship to another UAB department. Note that if the equipment is being transferred to another UAB department, an authorized signor for the receiving and relinquishing department must sign the form before routing it to Asset Management.
- 2. Trade-in To trade in UAB capital equipment for other UAB equipment, departments must complete an EDF including the description, property number, serial number, and current location of the equipment. Please include the requisition number in the requisition number box on the form if you have already been assigned one. If you haven't been assigned one, Asset Management will add it to the form during the requisition approval process. The department must then scan the approved EDF with a completed Equipment Purchase Information <u>Form</u> (EPI) for the new equipment to the requisition sollection in <u>OnBase</u>, along with any other supporting documentation for the new purchase. Requisitions referencing a trade-in of equipment will not be approved unless the approved EDF, EPI form, and quote are included in the back-up documentation.

Note: Certain factors such as donor or grant restrictions may prohibit the trade-in of equipment. Approval from Grants and Contracts Accounting is required if grant purchased items are being traded in.

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Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

COMPLETING THE EDF	Power dy Adobe Acrobat Sign	~ (?)
Open a new Equipment	Options v Please sign: UAB Asset Management Equipment Disposition Form June 24 Edition Next required	ield 2
Disposition Form:		
	UAB Asset Management EDF #	
 Navigate to the 	Questions? Please contact us: Phone (205) 934-5144 Email: FA-EDF@uab.edu	
Equipment Disposition	Department Information Transaction Types - Select a transaction type below. One transaction type per form. Start O Move/Transfer	
Form.	FROM: TO: Trade in -Enter Reputation # Department Name: Department Name: To: Trade in -Enter Reputation # Trade in -Enter Reputation # Trade in -Enter Reputation # Temp Misplaced/Stolen - If stolen, please attach Police Report.	
	Organization # Organization # Organization # Organization # Organization # Organization # Organization Organi	
• Click Continue at the	Phone #: Phone #: O Release of Ownership MUST have prior approval from UAB Financial Affairs Please attach documentation.	
bottom of the form to	Construction to UAB - Please statut documentation. Transfer to UAB - Please statut documentation. Other - Please provide bailed description.	
accept Adobe Terms of		
Use.	Operation UAB Property # Serial # Phi acal Movement QTY Description UAB Property # Serial # From: To:	
0000	Building Roo Building Room	
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	our <u>Physyr Policy</u> for details on our privacy practices.	
If you are prompted to		
Save Progress at any point	Save progress ×	
while filling out the form,		
you can:	Unsaved data might get lost, would you like to save the progress?	
		f
• Click the X to decline		
saving at this point.		
OR	Save Progress	- U
• Click Save Progress and		
follow the directions		
the system provides.		
Click the blue Start arrow	Powerd by	
	Acrobat Sign	3 *
to begin filling out the	Op ✓ UAB Asset Management → Equipment Disposition Form June 24 Edition Next required	field 1
form.		
	UAB Asset Management EDF # Questions?Please contact us: Phone;205) 334-5144 Email: FA-EDF@uab.edu	
	Department Information Transaction Types - Select a transaction type below. One transaction type per form.	
	Surt FROM: TO: Department Name: TO: Table In Enter Regulation #	
	Coganization #: Contact Person: C	
	Email: Enail: Enail: Enail: Enail: Compared Comp	
	Donation to UAB - Please attach documentation. Transfer to UAB - Please attach documentation.	
	Other - Please provide a brief description:	
	Physical Movement	
	QTY Description UAB Property # Serial # From: To: Building Room Building Room	
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 Select a Transaction Type: The form will highlight the Transaction Types section. Only one transaction type is allowed per form. Click the circle to select the appropriate transaction type for your equipment disposal needs. 	Transaction Types - Select a transaction type below. One transaction type per form. Move/Transfer Trade-In - Enter Requisition # Temp. Misplaced/Stolen - If stolen, please attach Police Report. Scrapped/Cannibalized - Items MUST be disposed of through the Surplus Property System (SPS) unless prior authorization is issued in writing by Asset Management. Release of Ownership - MUST have prior approval from UAB Financial Affairs. Please attach documentation. Donation to UAB - Please attach documentation. Other - Please provide a brief description:
From this point forward, you should click the blue Next arrow to have your cursor automatically moved to the next field.	requirements, refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide.
 Clicking the Next arrow will move your cursor to the "Requisition #" box: If you selected Trade-In, and you have been assigned a Requisition Number, please enter it here. If you have not been assigned one, Asset Management will add it to the form during the requisition approval process. Leave the Requisition # box blank if you selected another transaction type. 	Transaction Types - Select a transaction type below. One transaction type per form. Move/Transfer Trade-In - Enter Requisition # Temp. Misplaced/Stolen - If stolen, please attach Police Report. Scrapped/Cannibalized - Items MUST be disposed of through the Surplus Property System (SPS) unless prior authorization is issued in writing by Asset Management. Release of Ownership - MUST have prior approval from UAB Financial Affairs. Please attach documentation. Donation to UAB - Please attach documentation. Other - Please provide a brief description:

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Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

Department Information

TO:

Email:

Phone #:

Department Name

Organization #

Contact Person

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Provide **Department** Information:

- Click the blue Next arrow to proceed through the fields in the Department Information section.
 - Complete FROM:
 Department
 Information for all transaction types.
 - Only Complete **TO:** section for the Move/Transfer transaction type.

Clicking the **Next** arrow after completing Department Information moves your cursor to the "**Enter Description**" box:

- Only enter a description if you selected "Other" for transaction type.
- Leave it blank if you selected another transaction type.

Click **Next** to proceed to the first cell in the QTY column.

• You will provide applicable information about the equipment in this table.

	QTY	Description	UAB Property #	Serial #	From: Buil
Next					

Transaction Types - Select a transaction type below. One transaction type per form.

O Move/Transfer

FROM:

Email:

Phone #

Department Name:

Organization #:

Contact Person

Next

- Trade-In Enter Requisition #
- O Temp. Misplaced/Stolen If stolen, please attach Police Report.
- Scrapped/Cannibalized Items MUST be disposed of through the Surplus Property System (SPS) unless prior authorization is issued in writing by Asset Management.
- Release of Ownership MUST have prior approval from UAB Financial Affairs. Please attach documentation
 Enter Description here 100 characters or
- Donation to UAB Please attach docum
- Transfer to UAB Please attach documenter
- Other Please provide a brief description:

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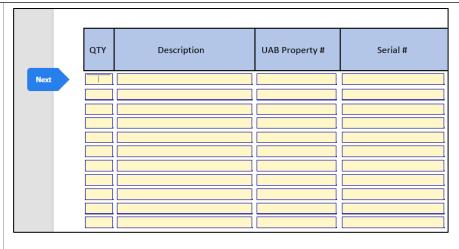
Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

Enter applicable information for equipment:

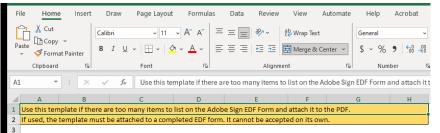
- Use a separate line for each item.
- Enter the amount (QTY) first, and continue entering information for each column across the table, including:
 - Requisition #
 - Description
 - UAB Property #
 - Serial #
- In the **Physical Movement** section, enter (as applicable):
 - From: Building/Room
 - To: Building/Room
- Refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide to ensure you provide all required information.

If you need more space to list all items for this transaction type:

- Download the <u>EDF</u> <u>Additional Fields</u> <u>Template here</u>.
- Complete the form and save it using your 9digit Org number and the date the EDF is submitted. (ex: 123456789 mm-ddyy.xlsx)
- Attach to the completed EDF.



	Physical Movement				
From:		To:			
Building	Room	Building	Room		



Before attaching, please save the file using your 9-digit Org number and the date the EDF is submitted: 123456789 mm-dd-yy.xlsx

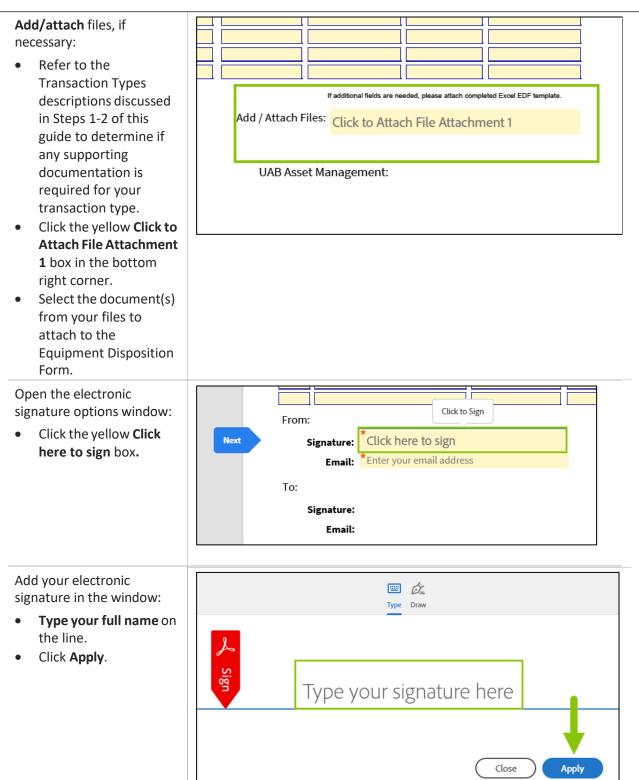
0						Physical	wovement	
7	QTY	Description	UAB Property #	Serial #	From:		To:	
8					Building	Room	Building	Room
9								
10								
11								
12								
13								
14								
15								
	Note: If used, the template must be attached to a completed EDF form.							

It cannot be accepted on its own.

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Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

 Enter your uab.edu email address on the EDF: Click the yellow Enter your email address box and type your uab.edu email address. 	From: Next Signature: <u>Blaze Dragon</u> Base Drago (Jan B. 204) Email: * Enter your email address To: Signature: Email:
 Review the form before submission: Refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide to ensure you provide all the required information. 	 Equipment Disposition Forms Departments must complete an Equipment Disposition Form and submit it to Asset Management for approval before taking any action regarding equipment. (For Surplus use SPS.) All equipment disposals are reviewed with respect to original funding sources that may affect the disposition of the equipment. If you have questions about Equipment Disposition Forms that are not answered in the information below, please contact Asset Management at EA-ead@uab.edu or (205) 934-5144. The types of actions that should be reported on the EDF are explained below: Move/Transfer— Select this transaction type if equipment is moving to a different location or the owning department is transferring stewardship to another UAB department. Note that if the equipment is being transferred to another UAB department, an authorized signor for the receiving and relinquishing department must sign the form before routing it to Asset Management. Trade-in — To trade in UAB capital equipment for other UAB equipment, departments must complete an EDF including the description, property number, serial number, and current location of the equipment. Please include the requisition number in the requisition number box on the form if you have already been assigned one. If you haven't been assigned one, Asset Management will add it to the form during the requisition approval process. The department must then scan the approved EDF with a completed Equipment Will not be approved unless the approved EDF, EPI form, and quote are included in the back-up documentation. Note: Certain factors such as donor or grant restrictions may prohibit the trade-in of equipment. Approval from Grants and Contracts Accounting is required if grant purchased items are being traded in.
 Submit the form: Click the blue Click to Sign button at the bottom of the form. 	From: If additional fields are needed, please attach con Signature: Blaze Dragon Ima Degen (June 2016) Add / Attach Files: FILE: EDF Kan 2024 6.pdf Email: bdragon@uab.edu UAB Asset Management: To: UAB Asset Management: By signing, I agree to this document, the Consumer Disclosure and to utilize electronic Click to Sign



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If necessary, add participants in the Assign to next participants window:	Assign to next participants × To complete the form please enter the information for the next participant. They will receive an email to complete this form.			
 If you selected the Move/Transfer transaction type, type the first name, last name, and email address of the transferee, then click the blue Click to sign button. If you DID NOT select the Move/Transfer transaction type, click the blue Click to sign button. 	Participant 2 *** Note: Add Transferee info for Move/Transfer tra using 'Click to sign' button. *** First name Enter first name Email address Con	ansactions only. Otherwise, sign directly t name nter last name firm email address nter email address Cancel Click to sign		
Confirm your email address:	LAB THE UNIVERSITY OF ALABAMA AT BIRMINGHAM.			
 Open your uab.edu email. Find the email from adobesign@adobesign. com. Click the Confirm my email address link. 	process, you just need to confirm your email address usin Confirm my email address	ipants have fulfilled their roles, all parties will receive a Disposition Form June 24 Edition as a PDF.		
You will see a notification that your EDF form has been verified and emailed	Powered by Adobe Acrobat Sign	Sign In 🌐		
to additional signer(s).	Your e-signing of UAB Asset Management – Equipment Disposition the additional signer(s) for their signature.	n Form June 24 Edition has been verified. It has now been emailed to		
You will receive another email from Adobe Sign.	Powered by Adobe Acrobat Sign			
• Click download a copy to save a copy of the		re all set g*UAB Asset Management – Equipment Disposition Form June		

form if desired.
Note: This is not the completed version of the form. You will receive another email when all parties have signed the form.

	✓ You're all set
	You finished signing "UAB Asset Management – Equipment Disposition Form June 24 Edition".
	Next, fa-edf@uab.edu will sign.
	We will send the final agreement to all parties. You can also download a copy of what you just signed.
	Manage your Acrobat Sign agreements
	Sign in

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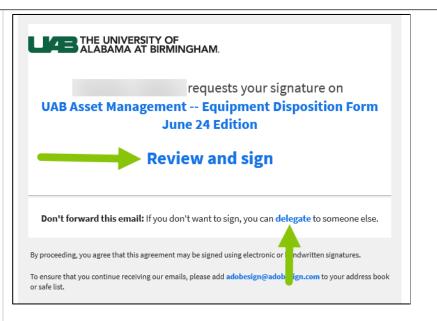
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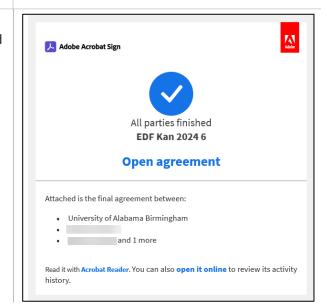
If you added a signer in the **Assign to next participants** window:

- An email will be sent to the email address you provided.
- The recipient can click **Review and sign** to review, make any edits/changes (if necessary), and add their signature to the document.
- The recipient can click the delegate link to send the signature request to a different signer.

You will receive an email after all parties have signed the EDF:

 Click Open agreement to view the completed document and save a copy for your records.





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VIEWING EDFs IN ADOBE	LAB THE UNIVERSITY OF ALABAMA AT BIRMINGHAM		
SIGN Use your Adobe Sign account to view all	my UAB		
Equipment Disposition Forms attached to your name/email:	Need Help? Start Tour of myHome		
 Navigate to the <u>myUAB</u> portal. 	myApps	Axiom	
In myApps, click Adobe Sign.	BlazerID Central box Box.com	Buy UAB	
 If you do not see Adobe Sign listed in myApps, click Manage 	ESM CMS ESM CMS LinkedIn Learning LinkedIn Learning LMS	Oracle HR & Finance	
 Apps and search for it. Log in with your 	Taleo Recruiting UAB Campus Learning System Zoom Zr UAB Perform	•A UAB For Me	
BlazerID and password.	C OnBase UAB Forms	C WAM	
Click the Manage tab at the top of your Adobe Sign home page to view any forms in progress, completed, canceled, etc.	Welcome,	and Manage Workflows Report	s Group () WAITING FOR YOU