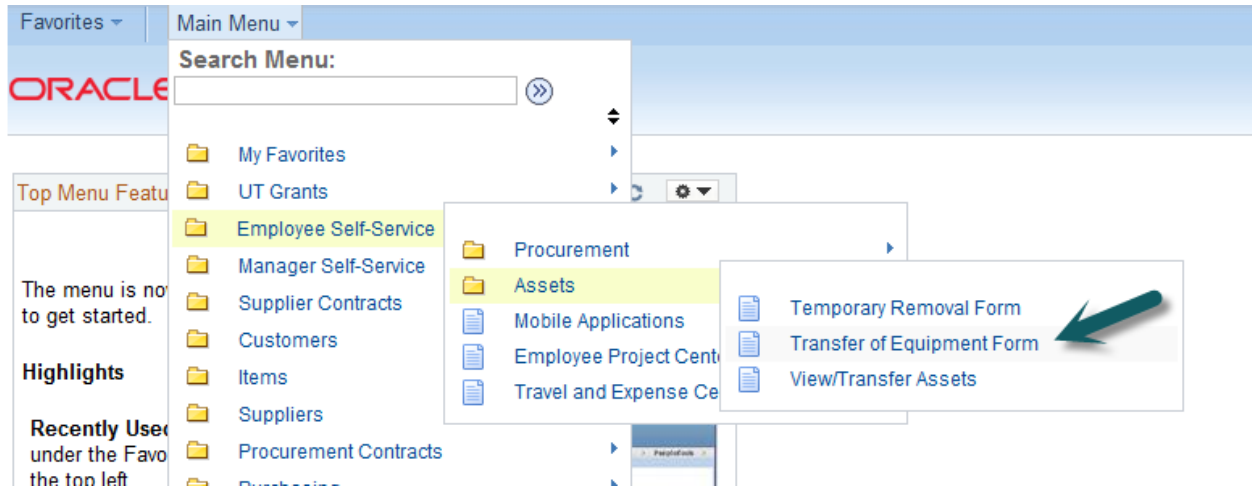


How to fill out a Transfer of Equipment Form – PeopleSoft 9.2

Navigation in PeopleSoft 9.2

Main menu > Employee Self-Service > Assets > Transfer of Equipment Form



Click on Add a New Value.

June 18, 2014

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Assets ▾ > Transfer of Equipment Form

ORACLE

Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

User ID: begins with []

Sequence Number: = []

Subject: begins with []

Document Key String: begins with []

Priority: = []

Due Date: = []

Approval Status: = []

Case Sensitive

Search Clear Basic Search Save Search Criteria

UTHealth's most recent policy regarding Interdepartmental Transfer of Equipment can be found on the Instructions tab.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Assets ▾ > Transfer of Equipment Form

ORACLE

Form **Instructions** Attachments

Transfer of Equipment Form

UTHealth is committed to the responsible use of capital or controlled equipment and the orderly transfer of capital or controlled equipment within its departments. Transfers of capital or controlled equipment within UTHealth must be made in a manner that clearly maintains the designation of responsibility for the property. For the purposes of this policy, "equipment" refers to capital and controlled equipment.

Any lab or clinic equipment with posted hazard warning sign(s) (e.g., biological, chemical, radiological, ultraviolet [UV]), must have its safety status verified prior to relocation.

PROCEDURE

I. Transfer of Equipment to Other Departments -- without Charge

The department that possesses the equipment completes an Interdepartmental Transfer of Equipment form listing each item. Both a representative of the department that possesses the equipment and a representative of the department receiving the equipment must approve/sign the form. An electronic copy of the form will be sent to Capital Assets Management (CAM), which modifies the departmental inventory records on receipt of the approved/signed forms. If the movement of equipment requires the services of an outside moving company, the receiving department is responsible for the cost.

On the Form tab of the Temporary Removal Form, begin filling out the form.

Form Instructions Attachments

Transfer of Equipment Form

1. *Subject

Priority Due Date

Status



Interdepartmental Transfer of Equipment Form

Department Transferring Equipment

2. *Transferring Rep. Employee ID

3. *Transferring Rep. Name

4. *Transferring PeopleSoft Department #

5. *Transferring Rep. Email Address

Department Receiving Equipment

6. *Receiving Rep. Employee ID

7. *Receiving Rep. Name

8. *Receiving PeopleSoft Department #

9. *Receiving Rep. Email Address

1. SUBJECT: Enter any subject or title for this form. This is a free form field so anything can be typed here. It is recommended to type a subject that will help you identify this form easily. Example: Dr. Joe Smith Transfer to MSB, Neurology transfer to ObGyn, etc.
2. TRANSFERRING REP. EMPLOYEE ID: Click on the magnifying glass to LOOK UP the employee ID number. Enter the last name of the person who is transferring the equipment, and click on LOOK UP. The search will bring up UTHealth employees with the same last name. Select the correct person's name by clicking on their name. The employee ID number will populate on the form.

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Look Up *Transferring Rep. Employee ID Help

Employee ID: begins with

Name: begins with

Last Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Employee ID	Name	Last Name
00051186	Egharevba,Adesuwa T	EGHAREVBA
101001	Marcus,Marianne T.	MARCUS
101002	Ritter,Steven J.	RITTER
101003	Moody,Frank G.	MOODY
101004	Glasser,Jay H.	GLASSER
101005	Jodoin,Maurice R.	JODOIN
101006	Smith,Arthur E.	SMITH
101007	Robinson,David J.	ROBINSON
101008	Portman,Ronald	PORTMAN

Look Up *Transferring Rep. Employee ID Help

Employee ID: begins with

Name: begins with

Last Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-197 of 197 Last

Employee ID	Name	Last Name
101006	Smith,Arthur E.	SMITH
101130	Smith,John M.	SMITH
101324	Smith,Doralene B.	SMITH
101602	Smith,Rachel K.	SMITH
101871	Smith,Jack W.	SMITH
101934	Smith,Glenda	SMITH
101958	Smith,Debbie	SMITH
102155	Smith,Sophia	SMITH

3. TRANSFERRING REP. NAME: Type the full name of the UHealth employee that is transferring the equipment to another department.

Department Transferring Equipment

*Transferring Rep. Employee ID

*Transferring Rep. Name

4. TRANSFERRING PEOPLESOFT DEPARTMENT #: Click on the magnifying glass to LOOK UP the Inventory PeopleSoft Department ID number, if you do not know it, for the department Transferring the equipment. There are different search options to choose from. If you know the beginning of the department number, enter as much as you know and click on LOOK UP. Select the correct Inventory PeopleSoft Department ID number by clicking on it. The Inventory PeopleSoft Department ID number will populate on the form.

Look Up *Transferring PeopleSoft Department # ×

SetID: UTH [Help](#)

Department: begins with

Description: begins with

Manager Name: begins with

[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Department	Description	Manager Name
12260200	Procurement	107474
12260300	Surplus	117981

5. TRANSFERRING REP. EMAIL ADDRESS: Enter the email address of the person transferring the equipment.

Department Transferring Equipment

*Transferring Rep. Employee ID

*Transferring Rep. Name

*Transferring PeopleSoft Department #

*Transferring Rep. Email Address

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- RECEIVING REP. EMPLOYEE ID: Click on the magnifying glass to LOOK UP the employee ID number. Enter the last name of the person who is receiving the equipment, and click on LOOK UP. The search will bring up UHealth employees with the same last name. Select the correct person's name by clicking on their name. The employee ID number will populate on the form.

Look Up *Receiving Rep. Employee ID

Employee ID: begins with

Name: begins with

Last Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-10 of 10 Last

Employee ID	Name	Last Name
102166	Suarez,Krysti	SUAREZ
103200	Suarez,Norma L.	SUAREZ
120464	Suarez, Virginia	SUAREZ
121313	Suarez, Patricia	SUAREZ
122304	Suarez, Martha C	SUAREZ
123962	Suarez, Guillermo	SUAREZ
125921	Suarez, Nicole	SUAREZ
126916	Suarez, Sthefany	SUAREZ
902176	Suarez, Yolanda	SUAREZ
114362	Suarez-Mendoza, Alex	SUAREZMENDOZA

- RECEIVING REP. NAME: Type the full name of the UHealth employee that is receiving the equipment.

Department Receiving Equipment

*Receiving Rep. Employee ID

*Receiving Rep. Name

- RECEIVING PEOPLESOFT DEPARTMENT #: Click on the magnifying glass to LOOK UP the Inventory PeopleSoft Department ID number, if you do not know it, for the department Receiving the equipment. There are different search options to choose from. If you know the beginning of the department number, enter as much as you know and click on LOOK UP. Select the correct Inventory PeopleSoft Department ID number by clicking on it. The Inventory PeopleSoft Department ID number will populate on the form.

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Look Up *Receiving PeopleSoft Department # ✕

SetID: UTH Help

Department: begins with ▼ 12

Description: begins with ▼

Manager Name: begins with ▼

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-4 of 4 Last

Department	Description	Manager Name
12020000	Info Technology Security	118460
12260200	Procurement	107474
12260300	Surplus	117981
12870000	Capital Assets Management	117981

9. RECEIVING REP. EMAIL ADDRESS: Enter the email address of the person receiving the equipment.

Department Receiving Equipment


*Receiving Rep. Employee ID 102166

*Receiving Rep. Name KRYSTI SUAREZ



*Receiving PeopleSoft Department # 12020000



*Receiving Rep. Email Address KRYSTI.SUAREZ@UTH.TMC.EDU



List of Transferring Assets



10. *Asset Custodian Employee ID 



11. *Asset Custodian Name

12. 1. Barcode Tag #  New Location 

13. 2. Barcode Tag #  New Location 

3. Barcode Tag #  New Location 

4. Barcode Tag #  New Location 

5. Barcode Tag #  New Location 

14.

List of Assets that DO NOT have a Barcode Tag. (Include Description and Serial Number)

More Information

[Form](#) | [Instructions](#) | [Attachments](#)

10. ASSET CUSTODIAN EMPLOYEE ID: Click on the magnifying glass to LOOK UP the employee ID number. Enter the last name of the person who is the user (custodian) of the equipment, and click on LOOK UP. The search will bring up UHealth employees with the same last name. Select the correct person's name by clicking on their name. The employee ID number will populate on the form.

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Look Up *Asset Custodian Employee ID ✕

[Help](#)

Employee ID: begins with

Name: begins with

Last Name: begins with

[Basic Lookup](#)

Search Results

View 100 First 1-7 of 7 Last

Employee ID	Name	Last Name
107250	Bernard,Mark A.	BERNARD
110248	Bernard,Reisha	BERNARD
113591	Bernard,Christophe	BERNARD
118460	Bernard,Karl	BERNARD
119128	Bernard,Reginald D	BERNARD
119537	Bernard,Lillian F	BERNARD
107578	Bernardino,Ernesto F.	BERNARDINO

11. ASSET CUSTODIAN NAME: Type the full name of the UTHealth employee that is the user (custodian) of the equipment.

List of Transferring Assets

*Asset Custodian Employee ID

*Asset Custodian Name

12. BARCODE TAG #: Enter each barcode tag that will be transferred to another department. Remember to add the 00 on the end of each tag number. You can also use the magnifying glass to LOOK UP tag numbers.

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Look Up 1. Barcode Tag # Help

Tag Number: begins with

Description: begins with

Asset Identification: begins with

Location Code: begins with

Serial ID: begins with

Model: begins with

Manufacturer Name: begins with

Business Unit: begins with

Custodian: begins with

Basic Lookup

Search Results

Only the first 300 results can be displayed.
View 100 First 1-300 of 300 Last

Tag Number	Description	Asset Identification	Location Code	Serial ID	Model	Manufacturer Name	Business Unit	Custodian
18900100	APPLE MACBOOK AIR 11"	000000120375	MSB7262	C02KL0UNDRV9	(blank)	APPLE COMPUTER	UTHSC	Concha,Amanda J
18900200	APPLE MACBOOK AIR 13"	000000120376	MSB7262	C02KL2AADRVG	(blank)	APPLE COMPUTER	UTHSC	Concha,Amanda J
18900300	APPLE MACBOOK AIR	000000120305	MSB6202	C02KH124DRV7	(blank)	APPLE COMPUTER	UTHSC	Xia,Yang
18900400	HP LASERJET PRINTER	000000120751	MSB7148	CND8F3H11H	(blank)	HEWLETT PACKARD	UTHSC	Dash,Pramod

13. NEW LOCATION: Click on the magnifying glass to LOOK UP the location code if you do not know it. Enter the 3 digit building code of the location where the asset will be located, and click on LOOK UP. If the building has multiple floors, you can also search by entering the 3 digit building code and floor number. (Example: OCB1) Select the correct location by clicking on it. The location code will populate on the form.

Look Up New Location Help

SetID: UTH

Location Code: begins with

Description: begins with

Basic Lookup

Search Results

Only the first 300 results can be displayed.
View 100 First 1-300 of 300 Last


Location Code	Description
OCB1002	OCB 1.002
OCB10SA	OCB 1.0SA
OCB10SB	OCB 1.0SB
OCB10SC	OCB 1.0SC
OCB10SE	OCB 1.0SE
OCB1100	OCB 1.100
OCB1100A	OCB 1.100A
OCB1110	OCB 1.110

14. LIST OF ASSETS THAT DO NOT HAVE A BARCODE TAG: If an asset does not have a barcode, enter the asset description and serial number in this free form field.

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List of Assets that DO NOT have a Barcode Tag. (Include Description and Serial Number)

1. HP LASERJET PRINTER SERIAL: 1D563WF



When you have finished filling out this form, click on SAVE at the bottom of the form.

More Information



Save



Notify

Once saved, scroll back to the top of the form. You can either Preview Approval Worklist, or Submit the form.

Form | Instructions | Attachments




Seq # 20

Transfer of Equipment Form

*Subject BBEGGAN SURPLUS TO INFO TECH SECURITY

Priority 3-Standard Due Date

Status Initial [Preview Approval](#) [Submit](#)



Interdepartmental Transfer of Equipment Form

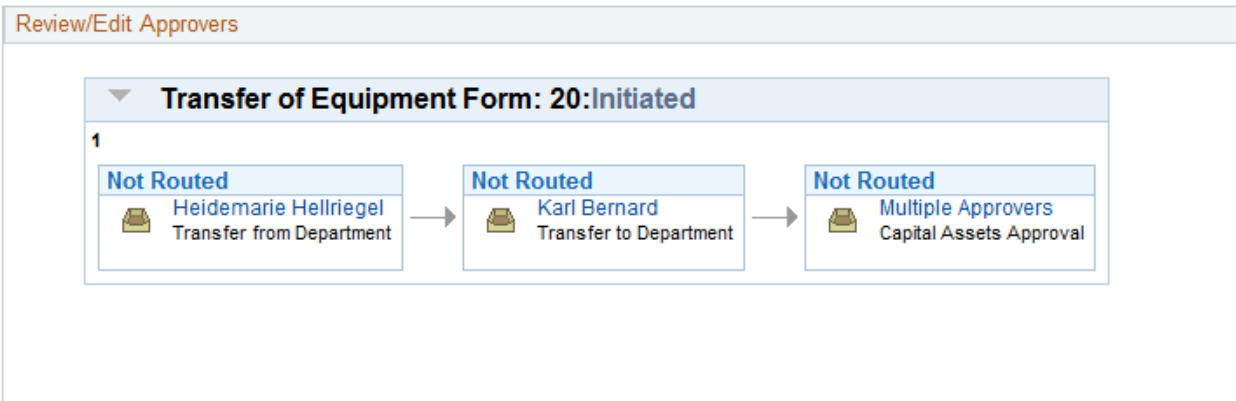
Click on the Preview Approval box to view. This will show you the workflow status.

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Transfer of Equipment Form

Subject BBEGGAN SURPLUS TO INFO TECH SECURITY

Review/Edit Approvers



OK Submit

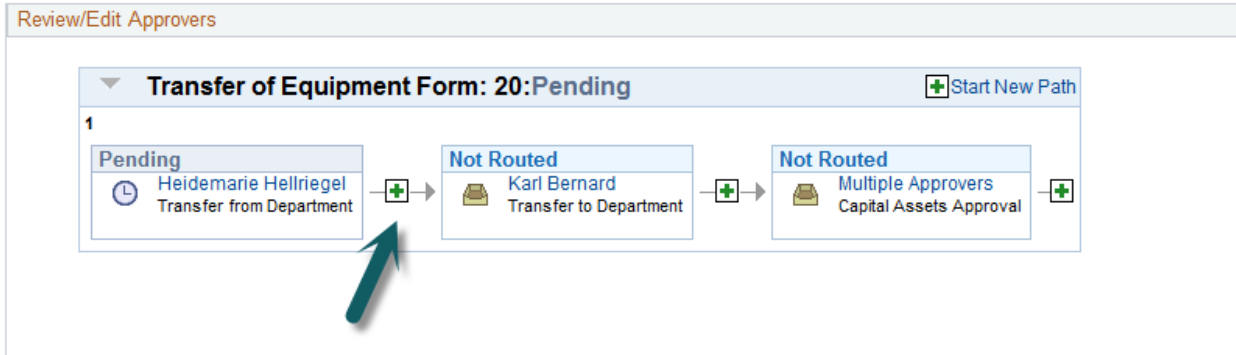
Once you are done previewing it, click on SUBMIT to route the form.

OPTIONAL: You can also add individuals to the approval process if you would like additional approvals. To add approvers, click on the + sign where you would like to add the approver in the process.

Transfer of Equipment Form

Subject BBEGGAN SURPLUS TO INFO TECH SECURITY

Review/Edit Approvers



OK

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Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:  Sonia Y Aguilar

Insert as: Approver
 Reviewer

The additional approver is now added to the workflow.





Transfer of Equipment Form

Subject BBEGGAN SURPLUS TO INFO TECH SECURITY

Review/Edit Approvers

Transfer of Equipment Form: 20:Pending + Start New Path

1

<p>Pending</p> <p> Heidemarie Hellriegel Transfer from Department</p>	→ +	<p>Not Routed</p> <p> Sonia Y Aguilar Inserted Approver</p>	→ +	<p>Not Routed</p> <p> Karl Bernard Transfer to Department</p>	→ +	<p>Not Routed</p> <p> Multiple Approvers Capital Assets Approval</p>	→ +
--	-----	--	-----	--	-----	---	-----

TO CHECK STATUS:

To check on the status of the forms you created, navigate Main Menu>Employee Self-Service>Assets>Transfer of Equipment Form. Enter your User ID and click on SEARCH. A listing of Transfer forms you created will show in the Results.

June 18, 2014



Search/Fill a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

User ID: begins with

Sequence Number: =

Subject: begins with

Document Key String: begins with

Priority: =

Due Date: =

Approval Status: =

Case Sensitive

[Basic Search](#)

Search Results

View All First 1-2 of 2 Last

User ID	Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
SAGUILAR 2		TEST	TRANSFER (blank)		3-Standard (blank)		Approved	05/09/2014 3:15PM
SAGUILAR 20		BBEGGAN SURPLUS TO INFO TECH SECURITY	TRANSFER (blank)		3-Standard (blank)		Pending	05/27/2014 3:11PM

Find an Existing Value | Add a New Value