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| Asset Disposals that may be initiated by Unit Asset Coordinators – Quick Reference Guide (QRG) |
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**Asset Disposals Initiated by Unit Asset Coordinator**

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# Quick Reference Guide Purpose

The purpose of this Quick Reference Guide (QRG) is to showcase which types of asset disposals may be initiated by a Unit Asset Coordinator, define when attachments are required, and call out any required approval steps.

# Audience

* Unit Asset Coordinators
* Cost Center Managers
* Business Asset Tracking Specialists
* Business Asset Accountants

# Disposal types that may be initiated by a Unit Asset Coordinator

Unit Asset Coordinators may initiate asset disposals for the following disposal types:

* Lost
* Stolen
* Disposed at Sea
* Cannibalized

# Disposal types that should ***not*** be initiated by a Unit Asset Coordinator

Due to Workday configuration, the disposal types below can’t be removed from available menu options but should not be used by a Unit Asset Coordinator. If selected, the Business Asset Tracking Specialist will reject the disposal request:

* Surplus – surplus disposals are when a department disposes of equipment, materials, and supplies, whether inventorial or not, through the established procedure facilitated by the Surplus Property Department. See the Equipment Inventory web site for [guidance on surplus disposals](https://finance.uw.edu/eio/equipment-lifecycle/disposition-equipment/equipment-disposals-methods/standard-disposal).
* Donation: Equipment donations must be approved by the Equipment Inventory Office. Submit donation requests using the UW Connect Ad-Hoc Maintenance request form.
* Returned to Agency- This disposal type is only used when UW is required to return equipment that was Federal or Agency titled to the sponsor and may only be initiated by the Business Asset Tracking Specialist (EIO.) If you have returned Federal or Agency equipment to a sponsor, please submit a [UW connect form](https://uwconnect.uw.edu/finance?id=sc_cat_item&sys_id=5b7e28401bc7d590287ba683b24bcb25) with the asset details and supporting documentation.
* Trade-In- Workday delivered disposal type not to be used by Unit Asset Coordinators. If you are TRADING in an existing piece of equipment for new equipment, see *Appendix of this document* for instructions.  
  + Note: If you are returning a piece of equipment to a *supplier* for credit, submit a UW Connect form to the Equipment Inventory Office so they can process the asset disposal.

# Approval Routing

Disposals initiated by a Unit Asset Coordinator will be routed to:

1. the Cost Center Manager (based on the Cost Center work tag on the asset)
2. the Business Asset Tracking Specialist

# Attachments

* If disposal type “Stolen” is selected, the Unit Asset Coordinator will get a “To Do” step to add the police report # to the asset record and attach a copy of the police report.
* For all disposal types, if the asset type is “Agency” or “Federal”, the Unit Asset Coordinator will get a “To Do” step to attach a relief of accountability request and sponsor approval to the asset record.

## Disposal scenario#1 – Unit Asset Coordinator initiates disposal of a University-Owned asset, with disposal type “Disposed at Sea” (no attachments required)

### Unit Asset Coordinator initiates disposal:

1. In the **Search** bar, enter the Asset Id to be disposed and press **Enter**
2. Select the **Asset** from the search results

Graphical user interface, application

Description automatically generated

**2 2**

**1 **

1. Click the linked Asset Id to go to the asset record and verify you’ve selected the correct asset
2. Click the **Related Actions** icon (), which will appear by hovering the mouse over the Asset Id
3. Select **Business Asset**
4. Select **Dispose**

Graphical user interface, application

Description automatically generated

**6**

**5**

**4**

1. On the Dispose Asset screen, enter:
   1. A transaction effective date
   2. The disposal method (Lost at Sea)
   3. Best practice: enter a comment to explain the disposal

Graphical user interface, table

Description automatically generated

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**Do not update any other worktags on this screen**

1. Click Submit  
   

**8**

### Cost Center Manager approves disposal

1. From Inbox, review Asset Disposal, disposal type and any comments
2. Approve the disposal

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application, chat or text message

Description automatically generated

Deny will fully cancel the disposal process. If you have questions, you may want to click the Cancel button and follow up with the employee via email.

### Business Asset Tracking Specialist approves disposal

1. From Inbox, review Asset Disposal, disposal type and any comments
2. Approve the disposal

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application, chat or text message

Description automatically generated

Deny will fully cancel the disposal process. If you have questions, you may want to click the Cancel button and follow up with the employee and/or Cost Center Manager via email.

### Business Asset Accountant Completes Asset Disposal Accounting Information

This step is informational- Accounting approval screens not part of this Job Aid

### After Accounting submitted, the asset status is updated and visible to the Unit Asset Coordinator

1. As Unit Asset Coordinator, In the **Search** bar, search on the disposed Asset Id **Enter**
2. Select the **Asset** from the search results
3. Click the Asset ID# to view the asset record with updated Status

A picture containing icon

Description automatically generated

## Disposal scenario #2 – Unit Asset Coordinator initiates disposal of a University-Owned asset, with disposal type “Stolen” (attachment required)

### Unit Asset Coordinator initiates disposal then responds to “To Do step” to attach Police report:

1. In the **Search** bar, enter the Asset Id to be disposed and press **Enter**
2. Select the **Asset** from the search results

**1 **

Graphical user interface

Description automatically generated with medium confidence

**2 2**

1. Click the linked Asset Id to go to the asset record and verify you’ve selected the correct asset
2. Click the **Related Actions** icon (), which will appear by hovering the mouse over the Asset Id
3. Select **Business Asset**
4. Select **Dispose**

Graphical user interface, application

Description automatically generated

**6**

**5**

**4**

1. On the Dispose Asset screen, enter:
   1. A transaction effective date
   2. The disposal method (Stolen)
   3. Best practice: enter a comment to explain the disposal

**Do not update any other worktags on this screen**

Graphical user interface, text, application, email

Description automatically generated

c

b

a

1. Click Submit  
   

**8**

Submitting records sends “To Do Step” to Unit Asset Coordinator’s inbox

Graphical user interface, text, application, email

Description automatically generated

1. Right click the Asset ID# to open the record in a new tab, so you can leave the To Do step open
2. From the Asset ID#, click the Related Actions button, then select Business Asset and Edit:

Graphical user interface

Description automatically generated

1. On the Edit screen, add the Police report # to the Memo field and upload the police report to the Attachments tab, then click OK.

Graphical user interface, text, application

Description automatically generated

1. Unit Asset Coordinator enters a comment & submits the To Do Step when done:

Graphical user interface, text, application

Description automatically generated

### Note- Submitting the “To Do” step triggers the same approval steps and routings from scenario #1. The attachments are viewable by the Cost Center Manager, Business Asset Tracking Specialist & Business Asset Accountant

## Disposal scenario #3 – Unit Asset Coordinator runs report to find all disposed assets in their Assigned Cost Center

1. In the **Search** bar, enter “Find Assets”
2. Select the **Report “Find Assets Unit Asset Coordinator”**  from the search results
3. To find all disposed assets, select “Disposed” from the available choices for Asset Status  
     
   Graphical user interface, application

   Description automatically generated with medium confidence
4. A list of all assets in Status Disposed will be returned:

Table

Description automatically generated

Appendix -bonus information  
  
Asset Trade in:   
When an asset is being traded in for another asset,   
***The requisitioner should:***  
1) create a line item for the asset being purchased that will benefit from the trade in.   
**Example:**

* Item: Microscope
* Spend category: Trackable-Capital Instruments and Laboratory Equipment (SC1233)
* Total cost: $10,000

2) then add a 2nd line for the item being traded in as follows:

* Item: Transformer
* Spend category: Equipment Trade-In (SC1256)
* Total cost: $-2000.00  
  (enter credit as a negative amount)

Memo line: add the Asset ID# of the asset to be traded in (Transformer)