On-Loan Transaction Form Checklist

Notes: Prior to completing form, you will need to fill out the Capitalized Asset Loan to External Entity form located on the Property and Inventory Management website (https://uafacilities.ua.edu/property-and-inventory-management/).

Required on Form:

- Complete Capitalized Asset Loan to External Entity form (link on Property & Inventory Management site) and have ready to attach.
- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Receiving Department: external entity name.
- Transaction #: (for your reference — default: MM/DD/YYYY + initials).
- FROM section: department name, org, phone, contact name/email, building/room (current).
- TO section: Department Name (company), Dept Org/phone, contact name/email, building/room (external address).
- Body: item description, serial number (or state “serial not visible”), asset number.
- Check: ON-LOAN box.
- Attachments: paperclip — Capitalized Asset Loan to External Entity form + supporting docs.
- Signatures: all required parties must sign.

Location Change Transaction Form Checklist

Required Form:

- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Transaction #: (for your reference).
- FROM section: department, org, phone, contact, current building/room.

- TO section: department, org, phone, contact, new building/room.
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: CHANGE IN LOCATION box.
- Signatures: all required parties must sign.

Transfer Department Transaction Form Checklist

Required on Form:

- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Receiving Department: name and contact info.
- Transaction #: (for your reference).
- FROM section: transferring department info (current).
- TO section: receiving department info.
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: TRANSFER: DEPARTMENT box.
- Signatures: all required parties must sign.

Surplus Transaction Form Checklist

Notes: Prior to completing form, you will need to submit a work order for Logistics requesting them to pick up the item(s).

Required on Form:

- Submit Logistics work order requesting pickup before/when completing form (record the WORK ORDER #).
- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Receiving Department: Surplus — email property@ua.edu.
- Optional: Building Representative notification (if required).

- Transaction #: (for your reference).
- FROM section: department/location of item(s).
- TO section: Dept Name: Surplus; email: property@ua.edu; Dept Org: 504305; Building: 323-ASB; Room: Inv001.
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: SURPLUS PROPERTY box.
- Enter: WORK ORDER # (logistics pickup number — not request number).
- Attachments: paperclip — supporting docs if needed.
- Signatures: all required parties must sign.

Delete/Remove Asset Transaction Form Checklist

Required on Form:

- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Transaction #: (for your reference).
- FROM section: Department info.
- TO section: Dept Name: Surplus; email: property@ua.edu; Dept Org: 504305; Building: 323-ASB; Room: Inv001 (contact for questions).
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: DELETE box.
- Notes section: state reason for delete request (Do NOT use for cannibalization, lost, or stolen).
- Attachments: paperclip — supporting docs.
- Signatures: all required parties must sign.

Cannibalization Transaction Form Checklist

Note: Please keep the asset tag on the item. After Property and Inventory Management receives this form, they will schedule a time to come out and remove the asset tag.

Required on Form:

- Keep the asset tag on the item (Property & Inventory Management will remove it).
- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Transaction #: (for your reference).
- FROM section: department info.
- TO section: Dept Name: Surplus; email: property@ua.edu; Dept Org: 504305; Building: 323-ASB; Room: Inv001.
- Body: description, serial number (or state "serial not visible"), asset number.
- Check: DELETE: CANNIBALIZATION box.
- Notes section: state reason for cannibalization.
- Attachments: paperclip — supporting docs if needed.
- Signatures: all required parties must sign.

Lost Transaction Form Checklist

Note: If you feel the item was misplaced, please notify Property and Inventory Management prior to completing this form. The asset will be placed in MISSING status for 30 days to allow the department time to locate it. If the last person that used the item has left UA or if the item has been in missing status for 30 days, please proceed with the steps below.

Required on Form:

- If misplaced, notify Property & Inventory Management BEFORE completing form (asset placed in MISSING status for 30 days). If appropriate, proceed.
- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Transaction #: (for your reference).
- FROM section: department info.

- TO section: Dept Name: Surplus; email: property@ua.edu; Dept Org: 504305; Building: 323-ASB; Room: Inv001.
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: LOST box.
- If police are involved: check POLICE CASE # box and enter case number.
- Notes: additional information.
- Attachments: paperclip — police report copy + supporting docs.
- Signatures: all required parties must sign.

Stolen Transaction Form Checklist

Required on Form:

- Contact UAPD immediately (205-348-5454) — police report required.
- Transferring Department: name and Property Manager/person completing form.
- Transferring Department Approval: Department Head/Manager (must be different from property manager).
- Transaction #: (for your reference).
- FROM section: department info.
- TO section: Dept Name: Surplus; email: property@ua.edu; Dept Org: 504305; Building: 323-ASB; Room: Inv001.
- Body: description, serial number (or state “serial not visible”), asset number.
- Check: STOLEN box.
- Check POLICE CASE # box and enter case number.
- Notes: additional information.
- Attachments: paperclip — police report copy + supporting docs.
- Signatures: all required parties must sign.