

Special considerations

— IT equipment

Prior to transferring any information technology items to another institution, please consider the following:

Intellectual Property	Office of University Counsel 919-962-1219
HIPAA	Juliann Tenney Office of University Counsel 919-843-9953
Software Site Licensing	UNC-CH ITS Security 919-445-9397

Still have questions about equipment transfers or not sure what to do? Send us an email at:

assets_team@unc.edu



How To: Transfer Equipment

Procurement Services

104 Airport Drive

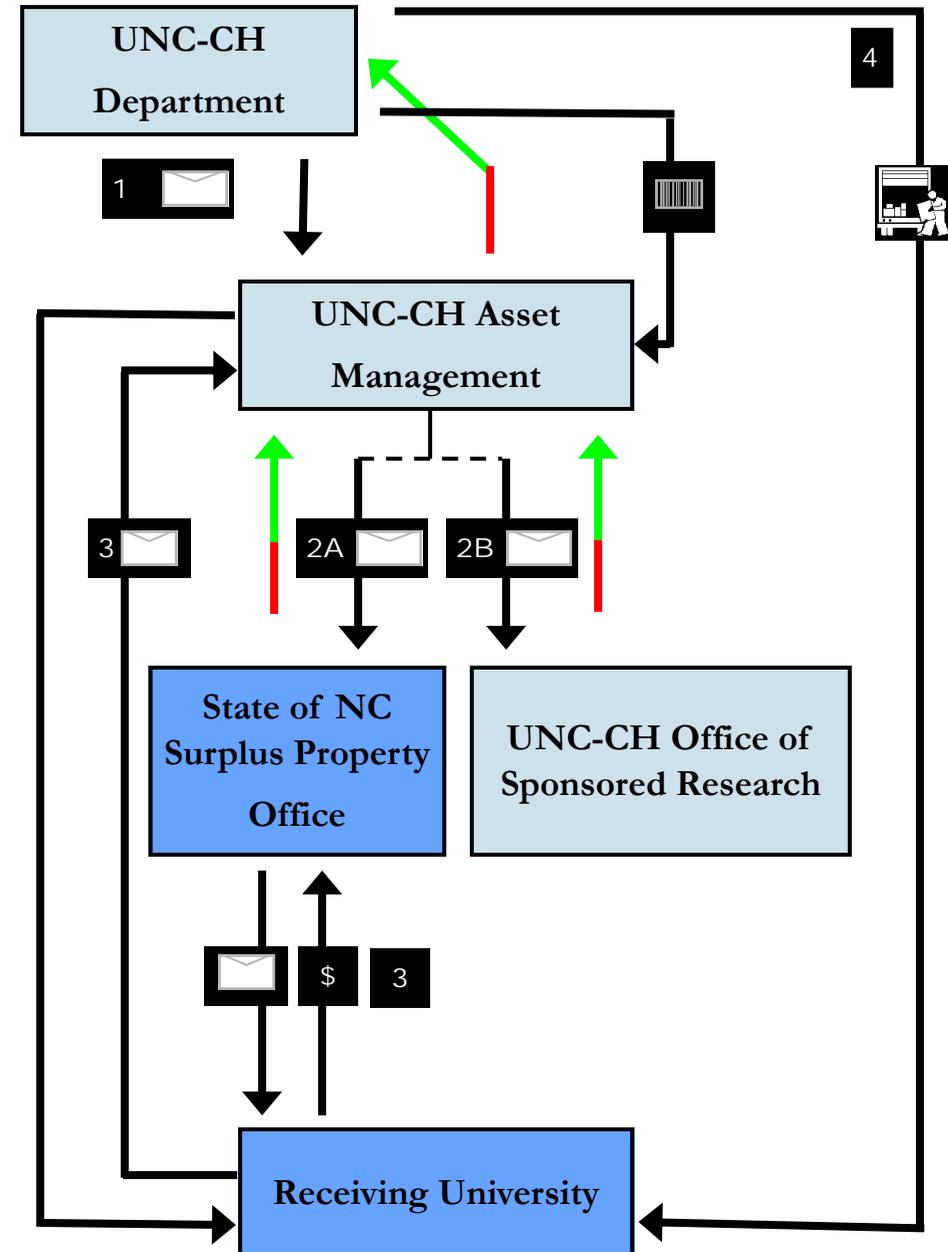
CB# 1100

Chapel Hill, NC 27599

finance.unc.edu/procurement

Revised 7/20/15

UNC's equipment transfer process



See description on reverse side.

Equipment transfer steps

The equipment process is multi-stepped and includes detailed coordination between two or more University units, a state agency and the receiving institution. The best effort has been made to visually capture this process; however, it must be assumed that in practice the steps may not be this linear and that communication steps may occur simultaneously.

Step One  Send a formal request letter to:

Asset Management, CB # 1070

Step Two  Depending on funding source, Asset Management will send a request letter to the Office of Sponsored Research and/or NC State Surplus Property Office.

Approval decisions will be communicated by Asset Management back to the departmental contact.

Step Three  After all parties agree on the

pricing, Asset Management will send the information to the new institution; the new institution will return a purchase order to Asset Management. NC State Surplus Property will send an invoice to

the new institution. The new institution will remit payment to NC State Surplus Property Office.

Step Four  After receiving final approval

from Asset Management, department forwards all UNC at Chapel Hill asset decals with [Capital Equipment Relocation Form](#) to Asset Management and ships equipment to new institution.

The transfer process requires approximately sixty days to complete. Before requesting a transfer of equipment, confirm that the transfer does not impair any ongoing research at the University.

University equipment can be acquired through a variety of funding sources. As such, approval channels for transfer of equipment to other institutions will vary. Equipment being transferred under an active grant, to an institution where the grant will also be transferred and research continued, do not generally require compensation to the State.

All other equipment transfers require reimbursement to the State from the receiving institution for the fair market value of the equipment.

The process starts with a letter to the Capital Asset Manager describing the

reason for transfer along with the following information for each equipment item requested (use a spreadsheet if necessary):

- Manufacturer's name
- Model
- Serial number
- UNC-CH decal number
- Source of funds to acquire equipment
- Purchase date
- Reimbursement amount requested from receiving institution
- Contact information for the receiving institution

The letter should be signed by the professor requesting the transfer, and approved by the Department Chairperson and Dean.

General purpose equipment or supplies, such as copiers and office calculators, desks and chairs are not usually transferred. If the department can no longer use this type of equipment, it should be sent to University Surplus for disposal or recycling.

Asset Management will:

- Review assets requested and determine which agencies need to approve transfer.
- Prepare letters and detailed asset listings for submission to State

Surplus and/or Office of Sponsored Research requesting approval.

- Contact receiving institution to arrange pricing and purchase order processing.
- Submit information for invoicing to State Surplus, as required.
- Monitor flow of paperwork and approval processes. Verify payment has been received by State Surplus from receiving institution, if required.
- Give the go-ahead for shipping after payment is received.

Departments are responsible for:

- Initial request letter to Asset Management.
- Waiting for go-ahead from Asset Management before releasing equipment for shipment.
- Working with the receiving institution for equipment shipment. **The receiving institution is responsible for transportation costs.**
- Retrieving UNC Asset Management decals before shipping, and forwarding decals to Asset Management at CB #1070.