Use this form when a University researcher requests a transfer of a University of Alberta equipment asset to another educational or research institution when the equipment asset has been purchased from restricted funds. Approval by the Vice-President (Research) is required. To request an assessment of fair value, please contact SMS (Surplus Assets) at 780.492.5393 or e-mail smssurplus@ualberta.ca.

Refer to the [Equipment Asset Disposal Procedure – Transfer to Another Institution](https://www.conman.ualberta.ca/stellent/groups/public/%40finance/documents/procedure/pp_cmp_064672.hcsp)

**Part A – Request to Transfer Equipment Asset**

Details of equipment asset(s) – attach additional page if required

Details can be obtained from the equipment asset register if the item was tracked (tagged). If it was not tracked, provide a description of the equipment asset.

|  |  |
| --- | --- |
| Asset tag number |  |
| Description of asset |  |
| Original Acquisition value  |  |
| Chart of accounts (COA) or Speed Code |  |
| Date of purchase |  |
| Fair value of asset (if required) |  |

Name of receiving institution:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Effective date of transfer:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Reason for transfer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor/sponsor name and terms and conditions relating to the transfer of equipment asset: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  The receiving institution has confirmed acceptance of the transfer. (Please attach completed *Confirmation of Acceptance of Transfer of Equipment Assets from the University of Alberta*).

This section applies to disposal of computer hard drives and other data storage devices:

[ ]  The unit has deleted all data and site-licensed software.

This section applies to disposal of equipment assets used to store radioactive or biological substances:

[ ]  The unit has completed the [Equipment Decontamination Verification](http://www.ehs.ualberta.ca/en/EHSDivisions/~/media/34BDD3F027634C768A79D95356E313EF.docx) and has attached a copy of this form indicating Biosafety clearance.

I hereby certify that the above information is true and complete:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature |  | Printed - Name / Title of Requestor  |  | Date |

**Part A Routing Instructions:**

Forward to Unit Head (Dean, Chair or Director)

**Part B – Unit Approval**

|  |
| --- |
| [ ]  Approve |
| [ ]  Not approved (please return form to requestor) |

Comments (optional):

|  |
| --- |
|  |
|  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Signature |  | Printed - Name / Title (Dean, Chair or Director) |  | Date |

**Part B Routing Instructions:**

1. If transfer not approved, return form to requestor.
2. If transfer approved, forward to Vice-President Research

**Part C – Vice-President Research Approval**

|  |
| --- |
| [ ]  Approve |
| [ ]  Not Approved |

Comments (optional):

|  |
| --- |
|  |
|  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Signature |  | Printed - Name / Vice-President Research |  | Date |

**Part C Routing Instructions:**

1. Vice-President Research: forward completed form to Unit Head.
2. Unit Head: forward form to requestor
3. Unit: for tracked equipment assets, forward copy of form (and attachments) to Equipment Services, 135 Materials Management Building or email: equipment.services@ualberta.ca or fax: 780.492.8268.