Dartmouth College Procurement Services Fixed Asset/Surplus Property 7 Lebanon Street Suite 313 Hanover, NH 03755 Phone 603-646-2149

CONTACT INFORMATION

Edit/Updated 9-13-2022

Dartmouth College Equipment Onboarding Form

This form must be completed for equipment received by Dartmouth College (Dartmouth) through a transfer, gift, donation, loan, award, sub-award, lease, lease buyout, or P-Card purchase which are not subject to standard purchase process through the office of Procurement Service (Policy ID: 024-0039). If equipment/assets have a **value over \$5,000 at the time of acceptance**, this form must be completed, and signatures collected prior to submission to the Fixed Asset Administrator within the Office of Procurement Services for processing. In addition to this form, submit all agreements, contracts, subaward documentation, relinquishment form, licensing, or other legal considerations in conjunction with or part of the physical or intellectual items. The completed form and supporting documentation should be sent to Fixed.Assets@Dartmouth.EDU. For onboarding equipment that does not meet the above criteria, consult with the department administrator. For grant funded equipment/assets, consult with the Office of Sponsored Projects (OSP) as required.

PI/Employee Name:		Custodian Name:	
Dartmouth School/Division:			Hinman #:
Reason for desi	red Transfer, Purchase	e, Gift, Donation, Loan, Award, S	ub-award, , Lease Buyout, or
Approved P-Car	rd/Corp-Card purchas	e (e.g., faculty move to Dartmou	th, etc.,):
Chart String:			
EQUIPMENT	<u>NFORMATION</u>		
Description of	equipment (if multip	le units, attach Exhibit A – Equi	oment Asset Spreadsheet with
relevant inform	, ,		•
Make:		Model:	
Description:			Asset#:
Serial #:		Dartmouth Asset Tag #:	CMS #:
PI/Staff name w	ho purchased/loaned	unit(s):	
		Current Market Value:	
		Item to be Located:	
Grant funded?	Grant funded? YES (if yes, provide sponsor name and grant #:)
		source of funds:	
Notes:			
Sample Excel			

	nt (or does the asset(s) or equipment contain
any part(s)) designed, developed, manufactured, or invorcould be patented, copyright written, trademarked,	•
No): Principal Investigator/Staff Initials:	of considered trade secret(s): (Tes of
<u>Third-Party Rights</u> Does the asset(s) or equipment con	 tain any third-party licensed content or
element which is not covered by an agreement with D	
otherwise lack the right to retain? (Yes or No) P	
TRANSFEROR INFORMATION	
Institution/Company:	Contact Name:
Address:	Phone:
Purchase Price (or include price for each piece in attached s	preadsheet):
REQUIRED APPROVALS	
#1 Signature of (New) <u>Faculty/Staff Member</u> requesting transfer (first signature required):	#2 Signature of <u>Department Chair or Division</u> <u>Supervisor</u> (second signature required):
Name:	Name:
Title:	Title:
Date:	Date:
#3 Signature of <u>OSP Director or designate</u> (third signature required if grant funded):	#4 Signature of Appropriate <u>Fiscal Officer</u> (fourth signature required):
(third signature required if grant funded):	(fourth signature required):
(third signature required if grant funded): Name: Title:	(fourth signature required): Name: Title:
(third signature required if grant funded): Name:	(fourth signature required): Name:
(third signature required if grant funded): Name: Title:	(fourth signature required): Name: Title:
(third signature required if grant funded): Name: Title: Date:	(fourth signature required): Name: Title: Date:
(third signature required if grant funded): Name: Title: Date: #5 Signature of Director of Technology Transfer Office (Only for those items with IP consideration):	(fourth signature required): Name: Title: Date:
(third signature required if grant funded): Name: Title: Date: #5 Signature of Director of Technology Transfer Office	(fourth signature required): Name: Title: Date:

Reason for Form:

The "Dartmouth College Equipment/Asset Onboarding Form" has been designed to serve as documentation for the onboarding of equipment and assets from outside the college. This form will be reviewed annually by external auditors and provided as direct documentation for the transfer of equipment or assets to Dartmouth.

Instructions and Additional Guidance:

Contact Information

<u>PI/Employee Name</u>: Enter the Principal Investigator's name for the research lab who is responsible for funding and if the form is being completed by a lab manager, enter their name adjacent to the PI name.

<u>Custodian Name</u>: Enter the name of Faculty or staff member designated by a department/division as responsible for assets within their control. Responsibilities include assisting the Fixed Asset administrator in identifying and tagging new equipment, communicating changes in equipment location, coordinating equipment sales, transfers or disposals using appropriate forms and assisting in a periodic inventory of all moveable equipment.

<u>Dartmouth School/Division</u>: Enter the name of the Dartmouth School (Geisel, Thayer, Tuck, etc.) or Dartmouth Division/Department

<u>Phone</u> #: Land line or Cell phone number which provides the best way to contact the responsible party for assistance.

Hinman Mailbox #: Hinman Mail designation for sending hard copies via intercampus Post. Reason for Transfer, Purchase, Gift, Donation, Loan, Lease Buyout or Approved P-Card/Corp-Card purchase (e.g., faculty move to Dartmouth, etc.): write a general reasoning for transfer of items covered by the Dartmouth Property, Plant and Equipment Management Policy Chart String: Provide chart string used for transfer, sale, gift, donation or Traded-In for which funds received will be applied to. If no funds will be received, input N/A.

Equipment Information

Make: Provide information from the identification sticker on the equipment

Model: Provide information from the identification sticker on the equipment

 $\underline{Description} : Provide\ general\ description\ of\ equipment\ including\ ancillary\ items\ (e.g.,\ Nikon\ ancillary\ items\ ancillary\ items\ (e.g.,\ Nikon\ ancillary\ items\ an$

SMZ1500 fluorescence microscope with spinning disk and objectives)

Asset#: Sequential number generated by the Fixed Asset System that is unique and assigned to each asset.

Serial Number: Provide information from the identification sticker on the equipment.

<u>Dartmouth Asset Tag Number</u>: Provide Dartmouth asset identification numbers (or alphanumeric codes for lease buyouts). If no asset tag number issued, include BOTH serial number and complete description per item.

<u>CMS Number</u>: Provide associated contract management system ID number, if applicable <u>Dartmouth PI/Staff</u>: Include PI or staff name of purchaser of specified equipment.

<u>Purchase Price and Year:</u> Include invoice price of equipment (including freight, installation, and/or testing charges) and in service date for equipment. If leased asset, include total lease price and year leased.

<u>Current (wholesale) Market Value:</u> Basic Trade-in value calculators can be used or calculate the current wholesale market value. Current wholesale market value can be calculated by comparing the unit to those advertised on the web by three different vendors. Combine the retail prices from each vendor, then divide by three, and multiply by 0.50.

<u>Current Location:</u> Provide the building name and room number where the item(s) are located for pickup purposes.

<u>Item to be located:</u> Indicate which building and architectural room number in which the item(s) will be housed on Dartmouth or DHMC campus. If off Dartmouth or DHMC campus, provide location and complete Off Campus Form

Grant Funded?

<u>If YES</u>, provide sponsor name and grant number: Provide Chart String(s) or PTAEO(s) used to purchase unit.

If NO, describe source of funds: Provide the Chart String(s) used to purchase unit.

Notes: Include any additional information relevant to the equipment/assets referenced on this form.

If **Exhibit A – Equipment Asset Spreadsheet** is used for multiple items, please note that here.

Protection of Dartmouth IP: Contact Tech Transfer Office (TTO) for assistance with this question,

Phone: 603-646-1418, Email: technology.transfer@dartmouth.edu,

website: https://www.tto.dartmouth.edu/

<u>Third-Party Rights:</u> Contact the Fixed Asset Administrator for assistance with this question, Email: fixed.assets@dartmouth.edu

Buyer/Transferee Information

<u>Institution/Company:</u> Enter name of current legal owner.

<u>Contact name</u>: Enter name of person with legal signature authority to process documents.

Address: Enter legal address of current legal owner

<u>Phone Number:</u> Land line or Cell phone number which provides the best way to contact the current legal owner.

<u>Purchase Price</u> (or include price for each piece in Exhibit A – Equipment Asset Spreadsheet): Include invoice price of equipment (including freight, installation, and/or testing charges)