

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

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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.

CONTACT INFORMATION

PI/Employee Name: _____ Custodian Name: _____
 Dartmouth School/Division: _____ Phone #: _____ Hinman #: _____
 Reason for desired Transfer, Purchase, Gift, Donation, Loan, Award, Sub-award, , Lease Buyout, or Approved P-Card/Corp-Card purchase (e.g., faculty move to Dartmouth, etc.):

Chart String: _____

EQUIPMENT INFORMATION

Description of equipment (if multiple units, attach [Exhibit A – Equipment Asset Spreadsheet with relevant information](#)):

Make: _____ Model: _____
 Description: _____
 Serial #: _____ Dartmouth Tag #: _____ CMS #: _____
 PI/Staff name who purchased/loaned unit(s): _____
 Purchase Price and Year Purchased: _____ Current Market Value: _____
 Current Location: _____ Item to be Located: _____
 Grant funded? YES (if yes, provide sponsor name and grant #: _____)
 NO (if no, describe source of funds: _____)

Sample Excel

Item	Make	Model	Description	Serial #	Dartmouth ID Tag #	CMS #	PI/Staff	Purchase Price	Year Purchased	Current Market Value	Current Location	Items to be located	Grant Funded (Y/N)	Chart string(s) or PTAEQ(s)	Dartmouth IP (Y/N)	Third party rights (Y/N)	Additional/ Ancillary Items	Notes
Item 1																		
Item 2																		
Item 3																		

Protection of Dartmouth IP Is the asset(s) or equipment (or does the asset(s) or equipment contain any part(s)) designed, developed, manufactured, or invented by faculty, staff or student(s) which is

or could be patented, copyright written, trademarked, or considered trade secret(s)? Yes or No): Principal Investigator/Staff Initials: _____

Third-Party Rights Does the asset(s) or equipment contain any third-party licensed content or element which is not covered by an agreement with Dartmouth or which Dartmouth might otherwise lack the right to retain? Yes or No Principal Investigator/Staff Initials: _____

TRANSFEROR INFORMATION

Institution/Company: _____ Contact Name: _____

Address: _____ Phone: _____

Purchase Price (or include price for each piece in attached spreadsheet): _____

REQUIRED APPROVALS

#1 Signature of (New) Faculty/Staff Member requesting transfer (first signature required):

Name: _____
Title: _____
Date: _____

#3 Signature of OSP Director or designate (third signature required if grant funded):

Name: _____
Title: _____
Date: _____

#5 Signature of Director of Technology Transfer Office (Only for those items with IP consideration):

Name: _____
Title: _____
Date: _____

#2 Signature of Department Chair or Division Supervisor (second signature required):

Name: _____
Title: _____
Date: _____

#4 Signature of Appropriate Fiscal Officer (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

PI/Employee Name: 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.

Custodian Name: 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.

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

Phone #: 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

Description: Provide general description of equipment including ancillary items (e.g., Nikon SMZ1500 fluorescence microscope with spinning disk and objectives)

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

Dartmouth Tag Number: Provide Dartmouth identification numbers or alphanumeric codes for lease buyouts. If no tag number issued, include BOTH serial number and complete description per item.

CMS Number: Provide associated contract management system ID number, if applicable

Dartmouth PI/Staff: Include PI or staff name of purchaser of specified equipment

Purchase Price and Year: Include invoice price of equipment (including freight, installation, and/or testing charges) and in service date for equipment.

Current (wholesale) Market Value: 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.

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

Item to be located: 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?

If YES, provide sponsor name and grant number: Provide Chart String(s) or PTAE0(s) used to purchase unit

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

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/>

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

Buyer/Transferee Information

Institution/Company: Enter name of current legal owner

Contact name: Enter name of person with legal signature authority to process documents

Address: Enter legal address of current legal owner

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

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