

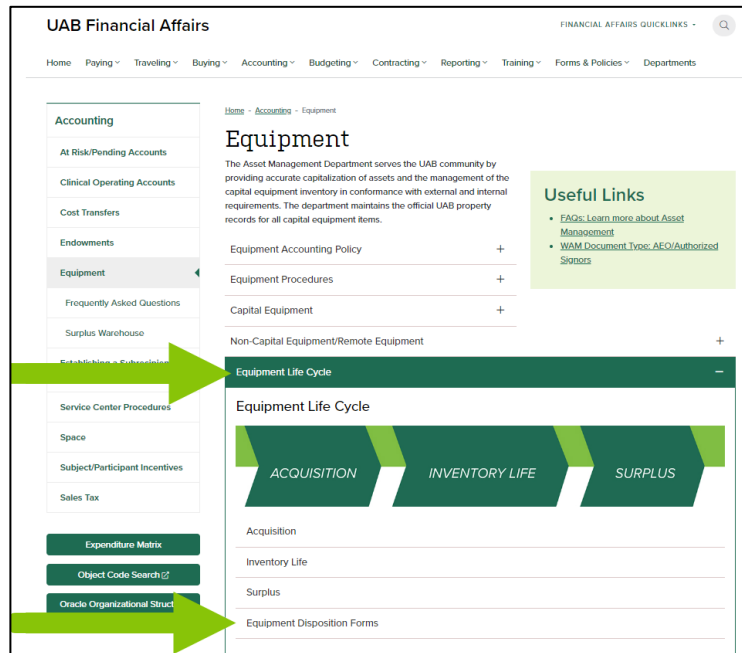
Departments must complete an **Equipment Disposition Form (EDF)** and submit it to Asset Management for approval before taking any action regarding equipment (Except Surplus). All equipment disposals are reviewed with respect to original funding sources that may affect the disposition of the equipment. Follow the directions below to complete and submit an Equipment Disposition Form.



DETERMINING THE TRANSACTION TYPE

Before completing the **Equipment Disposition Form**, review important information about transaction types on the Financial Affairs website:

- Navigate to the [Financial Affairs Accounting site](#).
- Click **Equipment Life Cycle**.
- Click **Equipment Disposition Forms**.



Determine the **transaction type(s)** for your equipment:

- Review the information provided for each type.
- Be prepared to provide the **specific information/documentation required** for the transaction type(s) you will use for your equipment.
- Refer to this page to ensure the EDF includes all necessary details.

Equipment Disposition Forms

Departments must complete an [Equipment Disposition Form](#) and submit it to Asset Management for approval before taking any action regarding equipment. **(For Surplus use SPS.)** All equipment disposals are reviewed with respect to original funding sources that may affect the disposition of the equipment. If you have questions about Equipment Disposition Forms that are not answered in the information below, please contact Asset Management at FA-ead@uab.edu or (205) 934-5144.

The types of actions that should be reported on the EDF are explained below:

- 1. Move/Transfer**— Select this transaction type if equipment is moving to a different location or the owning department is transferring stewardship to another UAB department. Note that if the equipment is being transferred to another UAB department, an authorized signor for the receiving and relinquishing department must sign the form before routing it to Asset Management.
- 2. Trade-in** — To trade in UAB capital equipment for other UAB equipment, departments must complete an EDF including the description, property number, serial number, and current location of the equipment. Please include the requisition number in the requisition number box on the form if you have already been assigned one. If you haven't been assigned one, Asset Management will add it to the form during the requisition approval process. The department must then scan the approved EDF with a completed [Equipment Purchase Information Form \(EPI\)](#) for the new equipment to the requisition collection in [OnBase](#), along with any other supporting documentation for the new purchase. Requisitions referencing a trade-in of equipment will not be approved unless the approved EDF, EPI form, and quote are included in the back-up documentation.

Note: Certain factors such as donor or grant restrictions may prohibit the trade-in of equipment. Approval from Grants and Contracts Accounting is required if grant purchased items are being traded in.

Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

Select a **Transaction Type**:

- The form will highlight the **Transaction Types** section.
- Only one transaction type is allowed per form.
- **Click** the circle to select the appropriate **transaction type** for your equipment disposal needs.

Transaction Types - Select a transaction type below. One transaction type per form.

- Move/Transfer
- Trade-In - Enter Requisition #
- Temp. Misplaced/Stolen - If stolen, please attach Police Report.
- Scrapped/Cannibalized - Items **MUST** be disposed of through the Surplus Property System (SPS) unless prior authorization is issued in writing by Asset Management.
- Release of Ownership - **MUST** have prior approval from UAB Financial Affairs. Please attach documentation.
- Donation to UAB - Please attach documentation.
- Transfer to UAB - Please attach documentation.
- Other - Please provide a brief description:

Note: For further details about transaction types and their requirements, refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide.

From this point forward, you should click the **blue Next arrow** to have your cursor automatically moved to the next field.

UAB Asset Management
 Questions? Please contact us: Phone:(205) 934-5144 Email: FA-EDF@uab.edu

Department Information

Transaction Types - Select a transaction

Next →

FROM: Department Name: Organization #: Contact Person: Email: Phone #:

TO: Department Name: Organization #: Contact Person: Email: Phone #:

- Move/Transfer
- Trade-In - Enter Requisition #
- Temp. Misplaced/Stolen - If stolen,
- Scrapped/Cannibalized - Items MU the Surplus Property System (SPS) issued in writing by Asset Managem
- Release of Ownership - **MUST** have UAB Financial Affairs. Please attach
- Donation to UAB - Please attach do
- Transfer to UAB - Please attach do
- Other - Please provide a brief desc

Clicking the **Next** arrow will move your cursor to the **"Requisition #"** box:

- If you selected **Trade-In**, and you have been assigned a **Requisition Number**, please enter it here. If you have not been assigned one, Asset Management will add it to the form during the requisition approval process.
- Leave the **Requisition #** box blank if you selected another transaction type.

Transaction Types - Select a transaction type below. One transaction type per form.

Requisition Number

- Move/Transfer
- Trade-In - Enter Requisition #
- Temp. Misplaced/Stolen - If stolen, please attach Police Report.
- Scrapped/Cannibalized - Items **MUST** be disposed of through the Surplus Property System (SPS) unless prior authorization is issued in writing by Asset Management.
- Release of Ownership - **MUST** have prior approval from UAB Financial Affairs. Please attach documentation.
- Donation to UAB - Please attach documentation.
- Transfer to UAB - Please attach documentation.
- Other - Please provide a brief description:

Provide **Department Information:**

- Click the **blue Next arrow** to proceed through the fields in the **Department Information** section.
 - Complete **FROM:** Department Information for all transaction types.
 - Only Complete **TO:** section for the Move/Transfer transaction type.

Clicking the **Next** arrow after completing Department Information moves your cursor to the **“Enter Description”** box:

- Only enter a **description** if you selected **“Other”** for transaction type.
- Leave it blank if you selected another transaction type.

Click **Next** to proceed to the first cell in the QTY column.

- You will provide applicable information about the equipment in this table.

QTY	Description	UAB Property #	Serial #	From: Build

Creating an Equipment Disposal Request with the Equipment Disposition Form (EDF)

Enter applicable information for equipment:

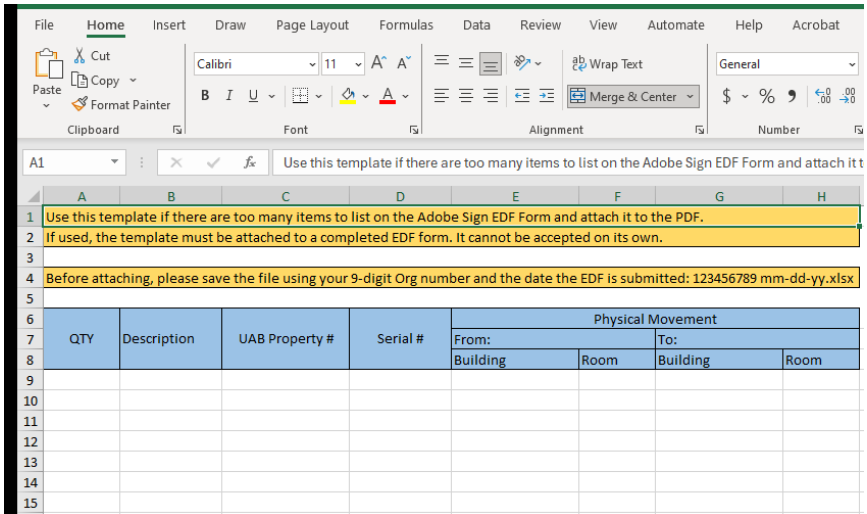
- Use a separate line for each item.
- Enter the amount (**QTY**) first, and continue entering information for each column across the table, including:
 - Requisition #
 - Description
 - UAB Property #
 - Serial #
- In the **Physical Movement** section, enter (as applicable):
 - From: Building/Room
 - To: Building/Room
- Refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide to ensure you provide all required information.

QTY	Description	UAB Property #	Serial #

Physical Movement			
From:		To:	
Building	Room	Building	Room

If you need more space to list all items for this transaction type:

- Download the [EDF Additional Fields Template here](#).
- Complete the form and save it using your 9-digit Org number and the date the EDF is submitted. (ex: 123456789 mm-dd-yy.xlsx)
- Attach to the completed EDF.



Note: If used, the template must be attached to a completed EDF form. It cannot be accepted on its own.

Add/attach files, if necessary:

- Refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide to determine if any supporting documentation is required for your transaction type.
- Click the yellow **Click to Attach File Attachment 1** box in the bottom right corner.
- Select the document(s) from your files to attach to the Equipment Disposition Form.

If additional fields are needed, please attach completed Excel EDF template.

Add / Attach Files: [Click to Attach File Attachment 1](#)

UAB Asset Management:

Open the electronic signature options window:

- Click the yellow **Click here to sign** box.

From: [Click to Sign](#)

Signature: * [Click here to sign](#)

Email: * Enter your email address

To:

Signature:

Email:

Add your electronic signature in the window:

- **Type your full name** on the line.
- Click **Apply**.

Type your signature here

Sign

Close Apply

Enter your **uab.edu** email address on the EDF:

- Click the yellow **Enter your email address** box and type your uab.edu email address.

The screenshot shows an email form interface. On the left, there is a vertical grey bar with an orange arrow pointing right labeled 'Next'. The form fields are: 'From:' with a signature 'Blaze Dragon' and date 'Jun 13, 2024'; 'Signature:' with the same signature; 'Email:' with a yellow input box containing the text 'Enter your email address'; and 'To:' with a 'Signature:' field below it.

Review the form before submission:

- Refer to the Transaction Types descriptions discussed in Steps 1-2 of this guide to ensure you provide all the required information.

The screenshot shows the 'Equipment Disposition Forms' page. It includes a header, a paragraph of instructions about completing the form and submitting it to Asset Management, and a section titled 'The types of actions that should be reported on the EDF are explained below:'. Two numbered items are listed: 1. Move/Transfer and 2. Trade-in. A note at the bottom states: 'Note: Certain factors such as donor or grant restrictions may prohibit the trade-in of equipment. Approval from Grants and Contracts Accounting is required if grant purchased items are being traded in.'

Submit the form:

- Click the blue **Click to Sign** button at the bottom of the form.

The screenshot shows the bottom portion of the EDF form. It includes the 'From:' field with signature and email, the 'Add / Attach Files:' field with 'FILE: EDF Kan 2024 6.pdf', and the 'To:' field with 'UAB Asset Management:'. At the bottom, there is a blue button labeled 'Click to Sign' with a green arrow pointing to it. A disclaimer at the very bottom reads: 'By signing, I agree to this document, the Consumer Disclosure and to utilize electronic signatures.'

If necessary, add participants in the **Assign to next participants** window:

- If you selected the **Move/Transfer** transaction type, **type the first name, last name, and email address of the transferee**, then click the blue **Click to sign** button.
- If you DID NOT select the Move/Transfer transaction type, click the blue **Click to sign** button.

Confirm your email address:

- Open your **uab.edu** email.
- Find the email from adobesign@adobesign.com.
- Click the **Confirm my email** address link.

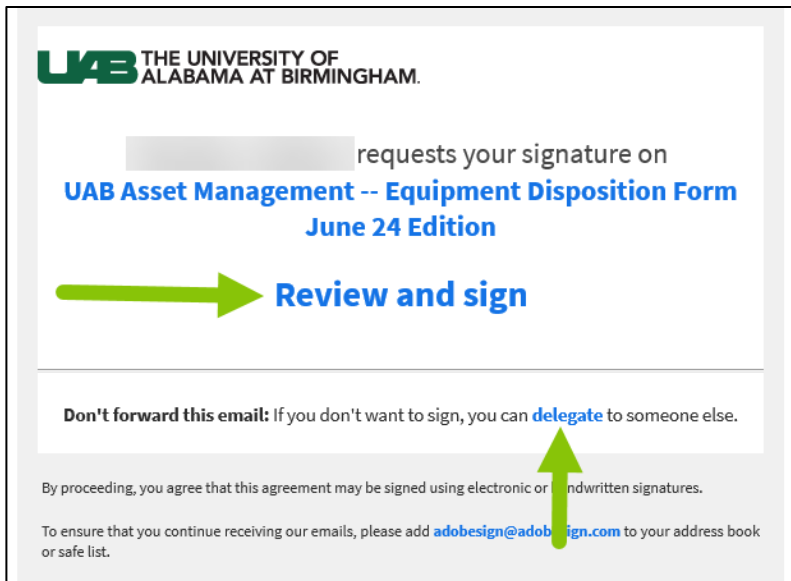
You will see a notification that your EDF form has been verified and emailed to additional signer(s).

You will receive another email from Adobe Sign.

- Click **download a copy** to save a copy of the form if desired.
- Note: This is not the completed version of the form. You will receive another email when all parties have signed the form.

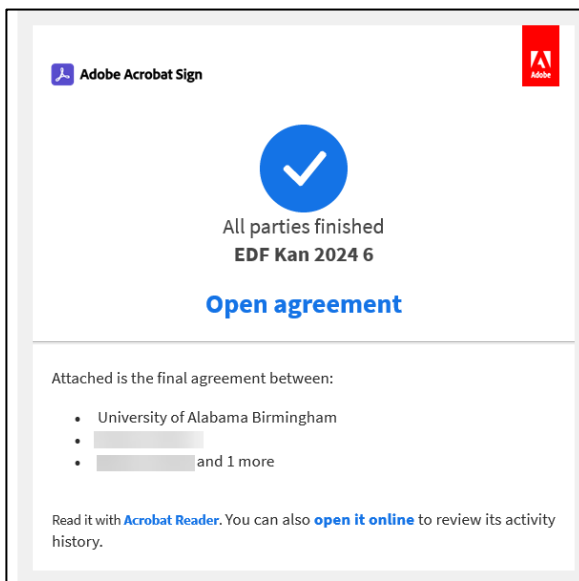
If you added a signer in the **Assign to next participants** window:

- An email will be sent to the email address you provided.
- The recipient can click **Review and sign** to review, make any edits/changes (if necessary), and add their signature to the document.
- The recipient can click the **delegate** link to send the signature request to a different signer.



You will receive an email after all parties have signed the EDF:

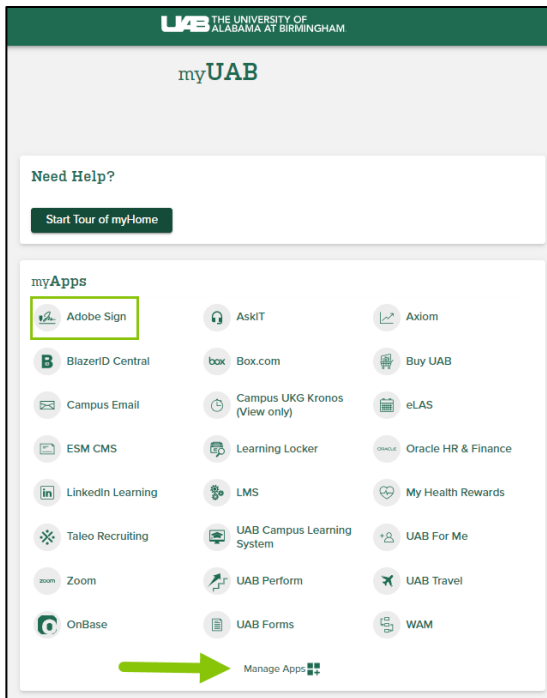
- Click **Open agreement** to view the completed document and save a copy for your records.



VIEWING EDFs IN ADOBE SIGN

Use your **Adobe Sign** account to view all Equipment Disposition Forms attached to your name/email:

- Navigate to the [myUAB portal](#).
- In myApps, click **Adobe Sign**.
- If you do not see Adobe Sign listed in myApps, click **Manage Apps** and search for it.
- Log in with your BlazerID and password.



Click the **Manage** tab at the top of your Adobe Sign home page to view any forms in progress, completed, canceled, etc.

