ASSET UPDATE FORM INSTRUCTIONS
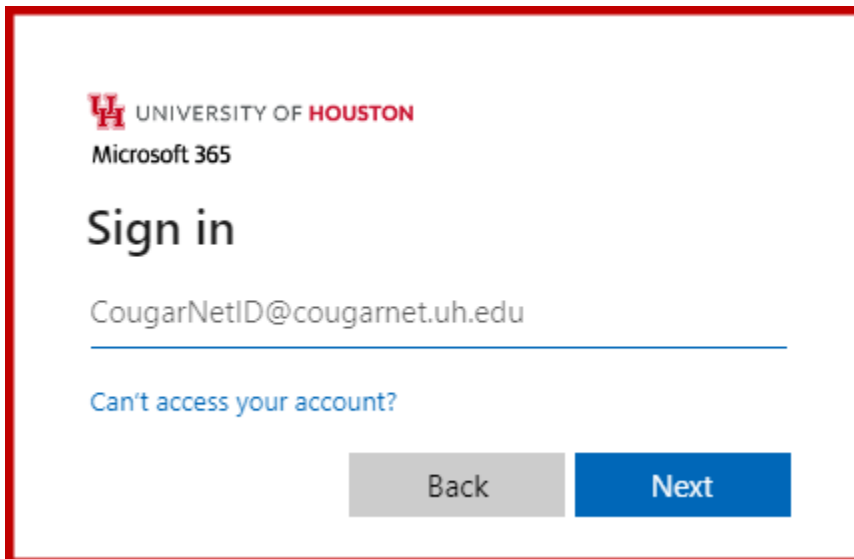
1. <u>LOG IN</u>

   a. To get started, log into your DocuSign account in the Access UH – Link at: https://accessuh.uh.edu/login.php.
   b. Enter your UH CougarNet Username and CougarNet Password as stated.
   c. It will direct you to the Access UH and select the Digital Signature DocuSign icon.

   d. Enter your UH email id as stated in the example. It will direct you to the DocuSign Template.

2. <u>USING THE TEMPLATE</u>

   • Go to Templates Tab.

- Go to Shared Folders and select Property Management Forms.

TEMPLATES

- My Templates
- Shared with Me
- All Templates
- **Favorites**
- Deleted

▼ FOLDERS   +

▼ SHARED FOLDERS

- Academic Affairs
- Business and Finance
- Property Management
- ▶ PS Finance Access
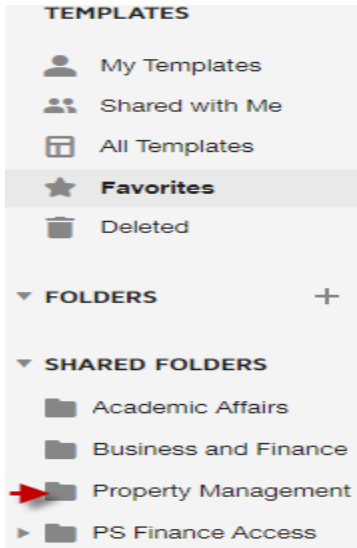
- Click on the **USE** button for using the form respectively. In this case you will use the UHS Asset Update Form.

Property Management

Name	Owner	PowerForms	Created Date	Last Change	
Authorization for Off Campus Property Form(1) Eligible for matching	Usha Mathew		1/17/2023 11:43:04 am	1/17/2023 11:44:01 am	USE
UHS Off Campus Property Return Form(1) Eligible for matching	Usha Mathew		10/14/2022 03:17:44 pm	10/14/2022 03:17:44 pm	USE
Designation of Department Property Custodian Form Eligible for matching	Usha Mathew		8/29/2022 04:53:55 pm	9/16/2022 07:20:19 am	USE
Certification of Departmental Physical Inventory Form Eligible for matching	Usha Mathew		8/29/2022 04:53:46 pm	9/16/2022 07:14:16 am	USE
UHS Asset Update Form Eligible for matching	Usha Mathew		9/1/2022 02:22:19 pm	9/16/2022 07:11:58 am	USE

- Under the Add recipient, enter the recipient's name and email address.
- Do not delete or ignore Department Property Custodian (FROM) while using this form.
- The initiator can delete the Department Property Custodian (TO) depending on the transactions you select for the Asset Update.
- It is required to fill all the details of respective individual except for Property Management Personnel.
- Department Property Custodian for Property Management is Raymon Matthews. Email at: Rmatthews@central.uh.edu
- College Business Administrator for Property Management is Minhthu Pham. Email at: Mpham@central.uh.edu

This form allows the user to select different Property Management transactions. The initiator will enter the email address for the required recipients. Reference table below for required recipients.

Required recipients for each transaction type:

#	TRANSACTION TYPE	Dept Property Custodian (FROM) Signature	College Business Administrator (FROM) Signature	Dept Property Custodian (TO) Signature	College Business Administrator (TO) Signature	Property Management Approval
1	Surplus-Work Order issue. Moves & Events Department to pickup to Warehouse	x	x	x	x	x
2	Release to IT Tech Service (Data Processing Equipment/s)	x	x	x	x	x
3	Fabrication	x	x			
4	Cannibalized/Damaged Property	x	x			
5	Transferred to Another Departmental/State Agency	x	x	x	x	x
6	Change in Building/Room/Location	x	x			
7	Traded-In	x	x			
8	Missing Property	x	x			
9	Stolen Property	x	x			
10	Other	x	x			

➢ For transaction type 1, 2 and 5. All Department Property Custodian, College Business Administrator and Property Management signatures are required for all transfer (TO & FROM)
➢ For transaction type 3, 4, 6, 7, 8, 9, and 10 only Department Property Custodian (FROM) and College Business Administrator (FROM) are required
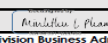
➢ **Example for Transaction Type 1, 2 and 5 for <u>all</u> recipients to fill out and signatures.**

UNIVERSITY of HOUSTON SYSTEM
Asset Update Form
Property Management

University of Houston
UH-Clear Lake
UH-Downtown
UH-Victoria

Instructions on the use of Asset Update Form:

1. Asset Update form must be completed by the department requesting any changes to taggable assets: Release, Surplus, Trade-in, Damaged, Transfer, Move location, Loan Property, Other ..
2. It is the responsibility of the department to which the asset is assigned for the initiation and completion of this form (including transfer acknowledgements).
3. Interdepartmental transfers require signature from both "FROM" and "TO" departments
4. Surplus items require Facilities/Construction Management Personnel signature to acknowledge receipt of items for auction.
5. Update locations if interdepartmental transfers result in change of location
6. Updates will not be processed unless all required information, authorizations and acknowledgements have been provided.

PLEASE PLACE AN "X" on one of the following transaction types: (use only one transaction type per form)

Surplus-Work Order issued. Moves & Events Department to pickup to warehouse-[Section A]	Change in Building/Room/Location
Release to IT Tech Services (Data Processing Equipment/s)-[Section B]	Traded-In (Please provide documentation)
Fabrication Property-[Section C]	Missing Property (Attach Form 74-194 & Questionnaire)
Cannibalized/Damaged Property	Stolen Property (Attach Form 74-194 & UH Police Report)
Transferred to another Department/State Agency	Other (attach supporting documents)

[Section A] - SURPLUS-MOVE/TRANSFER FUNITURE AND EQUIPMENT TO SURPLUS WAREHOUSE. (Requires Environmental Health and Safety: Yes _____)

Does the equipment require the review of Environmental Health and Safety? If Yes, please attached a Laboratory Equipment Safety Clearance Form for each piece of equipment with departmental equipment information. EHS review and signature will be obtained by Property Management and Facilities Management.

Cost Center to be used for work-order   1234-H0159-D1234-NA

[Section B] - TRANSFER OF DATA PROCESSING EQUIPMENT (DPU's)

I certify that all confidential and security sensitive information, including all licensed software and data files, have been removed from the data processing equipment identified.

Data Removed By:		Attach supporting documentations
Date of Removal:	Name of the Person	with certified signatures

[Section C] - INVENTORY TAG ASSIGNMENT FOR FABRICATION

Name of Principal Investigator:		Cost Center:
Item to be Constructed, Fabricated or Assembled:		Estimated Completion Cost:
Property Management Assigned * Tag Number:		Date of Completion:

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UNIVERSITY of HOUSTON SYSTEM
Asset Update Form
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* The department MUST reference tag number on ALL requisitions related to purchases for this fabrication.

UH Tag #	Serial #	Asset Description	Department Transfer		Location Change			
			FROM DEPARTMENT ID	TO DEPARTMENT ID	FROM		TO	
					Building	Room	Building	Room
123456	ABCD12	DELL LAPTOP	H0159	H0601	419	140	419	136

FROM Department: **TO Department:**

Department Name:	Property Management Department	Department Name:	Property Management Warehouse	
Name of Property Custodian:	Minhthu L Pham	Name of Property Custodian:	Raymon Matthews	
Authorized Signature:	*Minhthu L Pham* (Department Property Custodian)	Authorized Signature:	*Raymon Matthews* (Department Property Custodian)	
College/Division Business Administrator:	Langston Royster	College/Division Business Administrator:	Vichai Wongchukit	
Authorized Signature:	*Langston Royster* (College/Division Business Administrator or Designee)	Authorized Signature:	*Vichai Wongchukit* (College/Division Business Administrator or Designee)	

Property Management Approval:	Date: 03/10/2023	Attachments: Required for Missing, Stolen, Lost, and transfer of DPUs	
	Signature: *Property Management Group*		

Asset Update Form   Revised 09/01/2022

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Example for Transaction Type 3,4, 6-10, for <u>only</u> Department Property Custodian and College Business Administrator to fill out and signatures.

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Asset Update Form
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UH-Clear Lake
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Instructions on the use of Asset Update Form:

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2. It is the responsibility of the department to which the asset is assigned for the initiation and completion of this form (including transfer acknowledgements).
3. Interdepartmental transfers require signature from both "FROM" and "TO" departments.
4. Surplus items require Facilities/Construction Management Personnel signature to acknowledge receipt of items for auction.
5. Update locations if interdepartmental transfers result in change of location.
6. Updates will not be processed unless all required information, authorizations and acknowledgements have been provided.

PLEASE PLACE AN "X" on one of the following transaction types: (use only one transaction type per form)

Surplus-Work Order issued. Moves & Events Department to pickup to warehouse-[Section A]	Change in Building/Room/Location
Release to IT Tech Services (Data Processing Equipment/s)-[Section B]	Traded-In (Please provide documentation)
Fabrication Property-[Section C]	Missing Property (Attach Form 74-194 & Questionnaire)
Cannibalized/Damaged Property	Stolen Property (Attach Form 74-194 & UH Police Report)
Transferred to another Department/State Agency	Other (attach supporting documents)

[Section A] – SURPLUS-MOVE/TRANSFER FURNITURE AND EQUIPMENT TO SURPLUS WAREHOUSE. (Requires Environmental Health and Safety: Yes _____)

Does the equipment require the review of Environmental Health and Safety? If Yes, please attached a Laboratory Equipment Safety Clearance Form for each piece of equipment with departmental equipment information. EHS review and signature will be obtained by Property Management and Facilities Management.
   Cost Center to be used for work-order

[Section B] – TRANSFER OF DATA PROCESSING EQUIPMENT (DPU's)

I certify that all confidential and security sensitive information, including all licensed software and data files, have been removed from the data processing equipment identified.

Data Removed By:	Attach supporting documentations
Date of Removal:	with certified signatures

[Section C] – INVENTORY TAG ASSIGNMENT FOR FABRICATION

Name of Principal Investigator:	Cost Center:
Item to be Constructed, Fabricated or Assembled:	Estimated Completion Cost:
Property Management Assigned * Tag Number:	Date of Completion:

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UNIVERSITY of **HOUSTON** SYSTEM
Asset Update Form
Property Management

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* The department MUST reference tag number on ALL requisitions related to purchases for this fabrication.

UH Tag #	Serial #	Asset Description	Department Transfer		Location Change			
			FROM DEPARTMENT ID	TO DEPARTMENT ID	FROM		TO	
					Building	Room	Building	Room
543214	ADCDED	LAPTOP	H0159	H0159	419	111	401	123
412436	ABC543	COMPUTER	H0159	H0159	419	111	401	125

FROM Department:		**TO Department:**	
Department Name:	Porperty Management	Department Name:	
Name of Property Custodian:	Raymon Matthews	Name of Property Custodian:	
Authorized Signature:	Raymon Matthews	Authorized Signature:	
	(Department Property Custodian)		(Department Property Custodian)
College/Division Business Administrator:	Minhthu L Pham	College/Division Business Administrator:	
Authorized Signature:	Minhthu L. Pham	Authorized Signature:	
	(College/Division Business Administrator or Designee)		(College/Division Business Administrator or Designee)
Property Management Approval:	Date: 03/10/2023	Attachments: Required for Missing, Stolent, Lost, and transfer of DPUs	
	Signature: Property Management Group		

Asset Update Form   Revised 09/01/2022

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Add recipients

1 — Initiator
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Email *

2 — Department Property Custodian (FROM)
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Email *

3 — College/Division Business Admin (FROM)
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Email *

4 — Department Property Custodian (TO)
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Email *

5 — College/Division Business Admin (TO)
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Email *

6 — Property Management (Signing Group)
NEEDS TO SIGN ▾   **CUSTOMIZE ▾**   🗑

Name *

Property Management Group

Email *

Propertyacctg@uh.edu

Add message

☑ Custom email and language for each recipient

To: Initiator

Email Language *
English (US) ▼

Email Subject *
Asset Update Form from [[Initiator_UserName]]
Characters remaining: 54

Email Message
Please complete the asset update form, sign and attach any necessary attachments.

Characters remaining: 9919

To: Department Property Custodian (FROM)

Email Language *
English (US) ▼

Email Subject *
Asset Update Form from [[Initiator_UserName]]
Characters remaining: 55

Email Message
Review form and attachment/s (if any) and sign.

- When ready, Click **SEND** to send your form to respective individuals.

SEND ▼

3. COMPLETING THE REQUIRED FORMS

    a. The required forms needing to be completed will be emailed from DocuSign to the initiator along with the requirement to sign the document.
    b. Click on the link provided and the form will be displayed.
    c. Complete the form and click finish.

4. SIGNING THE TEMPLATE

    a. **REVIEW THE DOCUSIGN EMAIL** – Open the email and review the message from the sender. Click REVIEW DOCUMENT to begin the signing process.

    b. **AGREE TO SIGN ELECTRONICALLY** – Review the consumer disclosure and select the checkbox you agree to use Electronic Records and Signatures. Click CONTINUE.

    c. **START THE SIGNING PROCESS** –

- Click the START tag on the left to begin the signing process. You are taken the first field requiring action.
- Enter all the required fields.
- Click the SIGN tag. You are asked to Adopt Your Signature.

d. **VERIFY YOUR NAME** – Verify that your name and initials are correct. If not, change them as needed.

e. **ADOPT A SIGNATURE** –
   - Accept the default signature and initial style, or
   - Click SELECT STYLE, and select a signature option.

f. **SAVE YOUR SIGNATURE** – Click ADOPT and SIGN to adopt and save your signature information and return to the document.

g. **CONFIRM SIGNING** – When you finish clicking all signature tags in the document, confirm signing by clicking FINISH.

   (The form will be routed to the next signature required.)