

DISPOSITION, TRANSFER OR TRADE-IN OF EQUIPMENT

The location Business Office shall be notified immediately by the location receiving clerk or organizational unit head, as appropriate, when equipment is to be removed from the inventory at a location. Form 4cd-238 (see Exhibit A) is to be used to provide notice.

Following are the reasons for the removal of equipment and the corresponding processing instructions.

1. **Equipment sold as surplus or sale in lieu of trade-in.**

Processing Instructions

- The owner of equipment completes Disposition of Equipment, form 4cd-238, (checking box "to be sold as surplus") listing each equipment item to be surplus by asset number. Use multiple forms if assets to be surplus exceed the form limit. Owner of equipment, (preparer), signs the form and forwards 4cd-238 to the location Business Office for review and signature.
- Location Business Office forwards form 4cd-238 to the Director of Purchasing.
- Purchasing will notify all other locations of availability of equipment by sending a copy of form 4cd-238 to the location Business Office. Purchasing enters the date of the notification on the appropriate line on form 4cd-238 and files it in a "Surplus Pending" file.
- If equipment is requested by one of the Business Services officers, Purchasing transfers equipment in accordance with the procedure to transfer equipment to a different site.
- If no transfer request has been received within five business days of notification of availability, Purchasing prepares to dispose or sell property in accordance with current Governing Board Policy.
- When item of equipment has been sold, Purchasing to update the Enterprise Resource Planning (ERP) system.

2. **Equipment disposed of by removal due to:**

- a. trade-in (picked up by vendor);
- b. return to vendor for exchange or credit; or
- c. obsolete, damaged or no longer applicable to college/program.

Processing Instructions

- Department head completes Disposition of Equipment, form 4cd-238, whenever an item of equipment has an asset number assigned.
- Location Business Office forwards completed form 4cd-238 with all attachments to Purchasing for update in the ERP system.

3. **Equipment stolen or lost.**

Processing Instructions

- Department head notifies Police Services and the Business Services officer of any stolen equipment with a memo explaining the circumstances and completion of form 4cd-238.
- Business Services Office forwards 4cd-238 to Purchasing to update the ERP system.
- Police Services notifies the Chief Administrative Services Officer of any incident involving the loss of equipment by completing the property loss forms provided in Business Procedure 8.01.
- The Chief Administrative Services Officer evaluates the loss to determine if any money is recoverable under the current insurance coverage.

4. **Equipment destroyed or broken up for parts.**

Processing Instructions

Destruction or Disassembly of Equipment

- Department head completes Disposition of Equipment, form 4cd-238, checking box "to be destroyed or broken up for parts," and forwards to location Business Office for review and signature.
- Location Business Office forwards 4cd-238 form to Purchasing.

5. **Equipment transferred to a different location.**

Processing Instructions

- Purchasing completes Transfer of Equipment, form 4cd-238, on the inventoried item to be transferred due to the declaration of surplus equipment or the transferring of a program between locations and sends copies to both location Receiving Clerks.
- Transferring location Receiving Clerk ships item of equipment with a copy of the transfer form to the appropriate location Receiving Department.
- Receiving location Receiving Clerk receives equipment and lists the location of the item of equipment; including the organizational unit, and exact building and room (sub room if applicable). Receiving location Receiving Clerk forwards completed form 4cd-238 to Purchasing for update in the ERP system.

6. **Equipment transferred to a different organizational unit within the same location.**

Processing Instructions

- Transferring department head completes Transfer of Equipment, form 4cd-238, on the inventoried item to be transferred.
- Transferring Department ships item of equipment with a copy of the transfer form to the appropriate Department.
- Receiving department head receives equipment and lists the location of the item of equipment; including the exact building and room (sub room if applicable). Receiving department forwards completed form 4cd-238 to the Purchasing Department for update in the ERP system.

Contra Costa Community College District

**DISPOSITION, TRANSFER OR
TRADE-IN OF COLLEGE EQUIPMENT**

It is requested that the equipment inventory records for the listed equipment be adjusted as follows (check only one reason)

- | | |
|---|---|
| <input type="checkbox"/> Returned to vendor (Attach to yellow copy of approved form 4cd-149). Originator forwards all copies to: Location Inventory Clerk | <input type="checkbox"/> Trade-in – list P.O. number and vendor
<hr/> Originator forwards copies to: Director of Business Services, Location Inventory Clerk |
| <input type="checkbox"/> Lost or stolen (attach copy of theft report form 4cd-136). Originator forwards copies to: Location Inventory Clerk | <input type="checkbox"/> Sale in lieu of trade-in – list P.O. number and vendor of replacement
<hr/> Originator forwards copies to: Location Inventory Clerk |
| <input type="checkbox"/> To be sold as surplus (no replacement). Originator forwards copies to: Location Inventory Clerk | <input type="checkbox"/> Intra-location transfers to (location)
<hr/> Originator forwards copies to: Equipment Inventory Clerk; Used as shipping copy |
| <input type="checkbox"/> To be destroyed or broken up for parts
<hr/> Comment _____
Originator forwards copies to: Director of Business Services Division/Department Head | <input type="checkbox"/> Intra-location transfers to (location)
<hr/> Originator forwards copies to: Receiving Location Receiving Clerk; Transferring Location Receiving Clerk |
| <input type="checkbox"/> Combined as Part of Asset No. _____
<hr/> Originator forwards copies to: Location Inventory Clerk | <input type="checkbox"/> Canceled or Invalid
Originator forwards copies to: Location Inventory Clerk |

Asset No.	Description	<i>For Surplus Items Only</i>	
		<i>Building</i>	<i>Room</i>

Location _____
 Approved by _____

Submitted by _____
 Date _____
 Print Name

For District Purchasing Office Use

For Surplus Items:

Notice of availability to all other locations _____
 Board authorization to sell _____
 Invoice/receipt number and date _____

For Sales in Lieu of Trade-In:

Board authorization to sell _____
 Invoice/receipt number and date _____
 Abate revenue to expense ASN _____