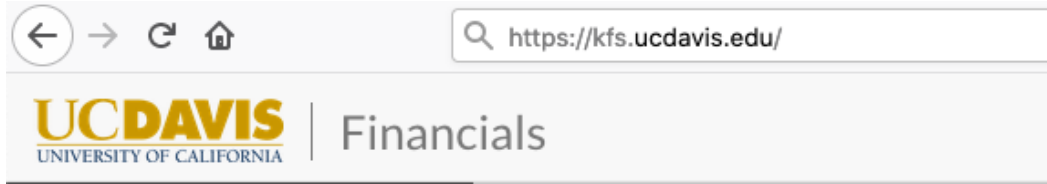


# HOW TO DO AN ASSET RETIREMENT DOCUMENT (aka ARG doc)

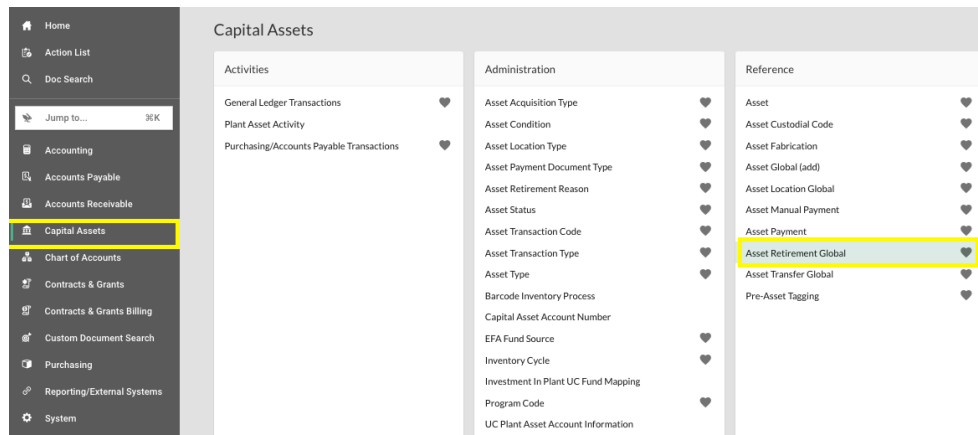
Updated 04/07/21

Sign into Kualii (aka KFS)



In the reference column, under **Capital Asset Management System**, click on *Asset Retirement Global*

In the resulting **Asset Retirement Reason Lookup** screen, click on *Search*



There are several reasons an asset should be retired, but the only ones the departments should use are:

Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	UCOP Disposal Code	UCOP Disposal Name
9	External Transfer outside UC System	No	29	Miscellaneous & Transfers outside UC system
1	Sold - Bargain Barn and ANR use only	No	21	Sold
2	Trade-in	No	24	Trade-In
3	Lost	No	22	Lost / Unable to Locate
4	Discarded -Bargain Barn and ANR Use Only	No	23	Salvaged - Discarded / Cannibalized for Parts
5	Cannibalized -BargainBarn & ANR Use Only	No	23	Salvaged - Discarded / Cannibalized for Parts
7	Theft	No	25	Theft
I	Terminating Intercampus Loan	No	16	Terminate Intercampus Loan
L	Terminating Govt Loan	No	20	Terminate Loan and Return Equipment to Federal Agency
Q	Miscellaneous EQ	No	29	Miscellaneous & Transfers outside UC system
T	External Transfer within UC System	No	26	Transfer to another UC campus
U	Disposal of Non-inventorial item	No	10	Retire Non-Inventorial
V	Terminating Non-Govt Loan	No	17	Terminate External Loan of Non-Government Equipment
X	Adjustment - EQ Only	No	66	EQ Use Only-Adjustment, cancelled item, etc.
Z	UCOP Under current threshold	No	49	Fully Depreciated Under Current Threshold / Write-Off

<a href="#">Retirement Reason Code</a>	<a href="#">Retirement Reason Name</a>	<a href="#">UCOP Disposal Code</a>	<a href="#">UCOP Disposal Name</a>
3	Lost	22	Lost / Unable to Locate
7	Theft	25	Theft
I	Terminating Intercampus Loan	16	Terminate Intercampus Loan
L	Terminating Govt Loan	20	Terminate Loan and Return Equipment to Federal Agency
U	Disposal of Non-inventorial item	10	Retire Non-Inventorial
V	Terminating Non-Govt Loan	17	Terminate External Loan of Non-Government Equipment

Two others should be used *only after* the Aggie Surplus department has given their approval:

<a href="#">Retirement Reason Code</a>	<a href="#">Retirement Reason Name</a>	<a href="#">UCOP Disposal Code</a>	<a href="#">UCOP Disposal Name</a>
4	Discarded -Bargain Barn and ANR Use Only	23	Salvaged - Discarded / Cannibalized for Parts
5	Cannibalized -BargainBarn & ANR Use Only	23	Salvaged - Discarded / Cannibalized for Parts

The most common reason for a department to retire an asset is because, after a good faith effort, it cannot be found and is deemed lost. Using that as our example, you can type in '3' in the **Retirement Reason Code** without having to search first,

Or, if you have searched, click on *Return Value* across from 3

The other choices you might have occasion to use are 7 (theft) or U (Disposal of Non-inventorial Item) or the retirement of

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	UCOP Disposal Code	UCOP Disposal Name	Active?
<a href="#">return value</a>	3	Lost	No	22	Lost / Unable to Locate	Yes

a borrowed asset after it has been returned to the lender (I, L, V). U are for those items under 5K that you no longer wish to track in CAMS; once 'retired from CAMS' they still need to be disposed of according to policy, but there will no longer be an AT document to do when it is time to salvage the item. All retirement docs route to EQ regardless of the reason.

Every document in Quali requires a 40 character or less "description."

You may put anything you like, but bear in mind this is like the "subject header" of an email – it is what other approvers will see in their KFS inbox and what other KFS users would see if they searched for your document. The description is a searchable field as well, so you are encouraged to spell correctly and put information that will either identify the purpose of the document or identify the asset. A good 40 character description might be "Retire [UCOP Tag #] as Lost."

For an asset that is being retired as lost, it is a very good idea to leave a doc note (either in the Explanation field or the Notes further down) regarding the circumstances, any known facts, and/or how you came by the information. The **Explanation** field is not mandatory for KFS, but it is in order for EQ to approve for anything over \$5,000.

Explanation :



The grey triangle of dots indicates that you can make the field bigger by dragging it:

The **Organization Document Number** is limited to 10 characters and may be used for whatever you like (like a PO number or the loan number for example). It is also a searchable field.

Organization Document Number :

The next thing you need to do is add the *asset* number that you are retiring (**to retire more than one asset at a time, skip to the Retiring Multiple Assets section further below**). Since *asset* numbers are not how UCD tracks the equipment (we use the UCOP Tag number which used to be referred to as the asset number), you search for the asset number by clicking on the magnifying glass and dropping in the UCOP tag number where indicated and then clicking on *search*:

ASSET DETAIL INFORMATION

NEW ASSET RETIRED

Look Up/Add Multiple Asset Lines

\* Asset Number:

UC Acquisition Type Code:

ADD

Asset Lookup

UCOP Tag Number:

Asset Number:

Linked Asset Number:

Custodial Code:

Original Panel Location Code:

Search Clear Cancel

Next, click on *Return Value*. Note that the asset number is right next to the UCOP Tag number:

Return Value	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description	Asset Type Code	Receive Date
<a href="#">return value</a>	<a href="#">503636</a>	863000684	9845	9519	R	22	CONTROLLER, 32 TERMINALS,REMOTE FOR SYSTEM 3270	H0766	05/01/1986

Now click on *Add*.

ASSET DETAIL INFORMATION ^

NEW ASSET RETIRED

Look Up/Add Multiple Asset Lines 🔍

\* Asset Number:  🔍 📄

UC Acquisition Type Code:

ADD

**SIDENOTE:** If you had known the asset number from the start, you could have simply typed it in and then clicked *Add*.

Once *Add* has been clicked, the asset's information shows up immediately below. This gives you a chance to make sure you have not inadvertently picked up the wrong asset number:

ASSET RETIRED ( 503332 ) Hide

Asset Number:	503332
Organization Owner Chart Of Accounts Code:	3
Organization Owner Account Number:	EVIR092
Organization Owner Organization Code:	BEVO
Acquisition Type Code:	
UC Acquisition Type Code:	49
Asset Status Code:	D
Asset Condition:	O3
Asset Description:	MICROCOMPUTER,256KB MEMORY MAX W/DUAL 360KB
Asset Type Code:	H0780
Vendor Name:	
Model Number:	PC6300
Serial Number:	0082778
UCOP Tag Number:	863000032
Federal Property Number:	
Create Date:	02/01/1986
In-Service Date:	02/15/1986
Depreciation Date:	03/01/1986
Total Cost:	1,615.00
Accumulated Depreciation:	
Book Value:	
Federal Contribution:	
Organization Text:	LOCATION: HEAD HOUSE 002
Custodial Code:	6025

DELETE

## Retiring Multiple Assets

If you need to retire two or more assets, click on the magnifying glass next to “**Look Up/Add Multiple Asset Lines**” on the right-hand side of the screen across from the “**Asset Detail Information**” tab.

ASSET DETAIL INFORMATION

NEW ASSET RETIRED

Look Up/Add Multiple Asset Lines 🔍

\* Asset Number:  🔍 📄

UC Acquisition Type Code:

ADD

This will bring up the **Asset Lookup** screen. If you know your UCOP numbers, you can enter up to eight at a time in the **UCOP Tag Number** field by separating them with a pipe character (“|”).

Example: 20103001231|20163001238. This will bring back just these two assets.

Select All From All Pages    Deselect All From All Pages    Select All From This Page    Deselect All From This Page    Return Selected

Select?	Asset Number	UCOP Tag Number	Custodial Code	Building Code	Asset Status Code	UCOP Disposal Code	Asset Description
<input checked="" type="checkbox"/>	<u>503329</u>	863000007	<u>2706</u>	<u>3320</u>	E	22	CENTRIFUGE ROTOR,SWINGING BUCKET,55,000RPM MAX
<input checked="" type="checkbox"/>	<u>503330</u>	863000023	<u>3070</u>	<u>3421</u>	A		ROTOR-CENTRIFUGE,FIXED ANGLE-24DEG,70,000 RPM
<input type="checkbox"/>	<u>503331</u>	863000027	<u>4145</u>	<u>4786</u>	R	23	LIQUID SCINTILLATION COUNTING SYSTEM, 3 CHANNEL.
<input type="checkbox"/>	<u>503332</u>	863000032	<u>6025</u>	<u>4104</u>	D		MICROCOMPUTER,256KB MEMORY MAX W/DUAL 360KB

The numbers do not need to be consecutive; however, if they are, you can bring back as many as you need by separating the first and last number with two decimal points (“..”).

Example: 20103001231..20103001238. This will bring back all the assets in between as well as the first and last numbers listed:

Select?	Asset Number	UCOP Tag Number
<input type="checkbox"/>	<u>503329</u>	863000007
<input type="checkbox"/>	<u>503330</u>	863000023
<input type="checkbox"/>	<u>503331</u>	863000027
<input type="checkbox"/>	<u>503332</u>	863000032

If your numbers don't lend themselves easily to either of the two scenarios above, narrow the search for assets by entering your User ID name under "Asset Representative Principal Name" and if necessary, the custodial codes in question (separate them by the pipe character if you have more than one custodial code).

<b>Asset Representative Principal Name:</b> <input type="text" value=""/>	<b>Custodial Code:</b> <input type="text" value=""/>
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**SIDENOTE:** It is not recommended that you retire as lost assets with different title. This way, if there is a question on a non UC titled asset, your document will not need to be disapproved just for that asset, or for one or two assets. EQ does not have the ability to amend documents (i.e., add or remove asset numbers).

When you are ready, click "Search." Your results will be at the bottom of the screen.

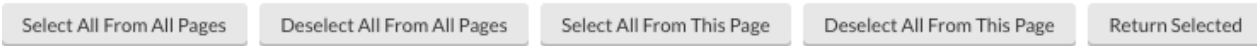
Using the "Select?" column, check off all those assets you wish to retire.

Select?	Asset Number	UCOP Tag Number
<input type="checkbox"/>	<u>503329</u>	863000007
<input type="checkbox"/>	<u>503330</u>	863000023
<input type="checkbox"/>	<u>503331</u>	863000027
<input type="checkbox"/>	<u>503332</u>	863000032

You can cherry pick if you have more assets returned than you want to retire, or if all of the ones you see need to be retired, click on "select all from all pages."

<b>select all from all pages</b>	<b>deselect all from all pages</b>	<b>select all from this page</b>	<b>deselect all from this page</b>	<b>return selected</b>
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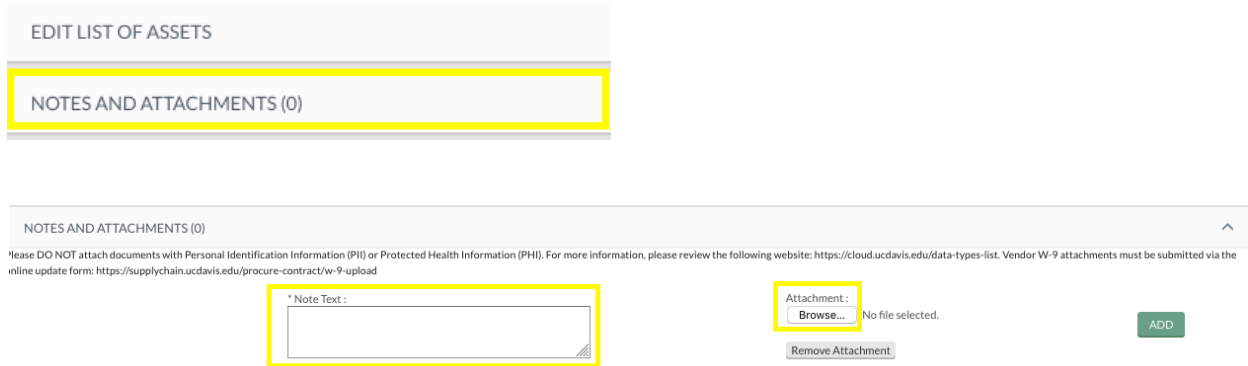
Once your assets are selected, click on “return selected.”



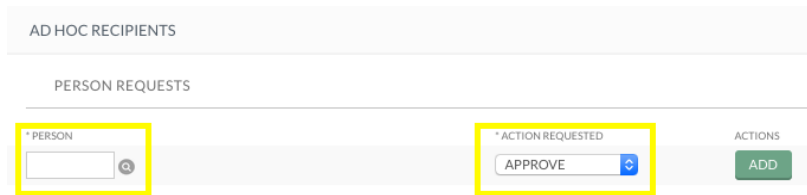
Because you used the **Look Up/Add Multiple Asset Lines** method, you do not need to “add” although now would be a good time to make sure the assets you want to retire are listed.

## FINISHING YOUR RETIREMENT DOC

If you have notes or attachments you wish to add, ‘show’ the Notes and Attachments Tab and add them:



If you wish to ad-hoc route it to someone for *approval*, you must do so before you submit the document. Otherwise you may ad-hoc for FYI purposes both before or after submitting. If you don’t know the person’s user ID, use the magnifying glass to look them up. If you don’t need to ad-hoc route it to anyone, just skip this step:



Click on *Submit*. You’re all done!

