Capital Equipment Service Center Validation Program
Department Checklist

The following is a checklist outlining the workflow for DPA, SCM/FC and DFA/ASM during the service center capital equipment validation. Please mark each item after the task is complete. If you have any questions, please contact your PSR.

Deadline

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<th>Service Center Name</th>
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**Department Property Administrator (DPA)**

- Print two asset reports using the 286_DPA_Comprehensive Report and the 296_Award_Management Report in Oracle Business Intelligence-Enterprise Edition (OBIEE).
- Match the total number of assets on the reports to those residing in the center, and vice versa; adjust Sunflower (SFA) records as needed.
- Match asset acquisition date, acquisition cost, acquisition method and ownership in SFA to the receiving date and purchasing method and information on the corresponding PO; adjust SFA records as needed.
- Email the DPA Comprehensive and Award Mgt reports to SCM/FC, along with the checklist.
- Update asset records in SFA as communicated from SCM/FC and DFA/ASM.
- Email the checklist signed by you, SCM/FC and DFA/ASM, along with the revised asset reports, one in **DPA Comp** and the other **Award Mgt**, to sc_eqmt_validation@lists.stanford.edu.

**Service Center Manager or Financial Contact (SCM/FC)**

- Ensure the DPA checklist is completed.
- Review the latest 296 Award Mgt Report from DPA.
- **Yellow-highlight** capital assets for which depreciation is included in the center’s current budget.
- Check that the PTA(s) of capital assets reconcile to those reported to RAPC.
- Communicate asset changes to DPA for Sunflower updates.
- Email the 286 DPA Comprehensive and 296 Award Mgt reports to DFA/ASM.
- Sign the checklist and forward it to DFA/ASM.

**Director of Finance and Administration (DFA)/Administrative Services Manager (ASM)**

- Ensure the checklists for DPA and SCM/FC are completed.
- Review the finalized asset reports (DPA Comprehensive and Award Mgt) from DPA and SCM/FC to ensure accuracy.
- Sign the checklist and return it to DPA.

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Flowchart of Capital Equipment Department Validation Process

**DPA**
- Run 286 & 296 reports in OBIEE
- Ensure DPA Comp report matches center location contents
- Ensure asset information in Sunflower matches what is in purchase order
- Email DPA Comp and Award Mgt reports to SCM/FC
- Ensure checklist is signed and send finalized asset reports to PMO

**SCM/FC**
- Review 296 Award Mgt report
- Ensure assets included in center’s current budget are yellow highlighted
- Ensure PTAs of assets match those reported to RAPC
- Communicate all asset changes to DPA for updates in Sunflower
- Sign checklist and email the Award Mgt and DPA Comp reports to DFA/ASM

**DFA/ASM**
- Review reports from SCM/FC
- Ensure reports are finalized and accurate
- Sign checklist and return it to DPA

Thank you!