Sunflower Excess Request Template Information

Excess Requests in Sunflower are necessary when an asset is being disposed through any means other than through collection by Surplus for sale, scrap or recycling. The templates below are for use in financial retirements of assets disposed of through Sunflower. When creating your excess request, please copy and paste the appropriate template (**blue text only**) into the comment section of the request being generated in Sunflower. (Use control-V to paste in Sunflower). Please enter all of the requested information; it is needed to properly retire the record(s). If you have any questions or need help, please contact your University Property Administrator (UPA).

RETURN TO MANUFACTURER

Suggested Disposal Method: RETURN TO MFR
Contact name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
Return Auth. Number:
Date of Return:
Credit Amount:

When to use: Asset is being returned to the vendor or manufacturer for full credit against the PO (less restocking fees, if any). Also used when returning an evaluation loan item. Not to be confused with TRADE-UP or EVEN EXCHANGE (see below).

LEASE/LOAN RETURN

Suggested Disposal Method: LEASE/LOAN RETURN
Contact name/phone:
Lender:
Return Date:
Lease PO Number/Loan Number:
Shipping Method/Docs:
Notes:

When to use: Assets being returned to the lender which were either leased or part of a loan.

TRADE-UP

Suggested Disposal Method: TRADE-UP
Contact name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
New Purchase Requisition Number:
Value (Credit) of Trade-in:
New Asset SUID Number:

When to use: Asset is being used as a trade-in for credit against a new purchase. A new PO is generated.

STOLEN

Suggested Disposal Method: STOLEN
Contact name/phone:
Police Report Number:
Date of Report:
Replacement Asset PO Number:
Insurance Claim Number:

When to use: Asset has been reported stolen, and a police report has been filed.

TRANSFER TO OUTSIDE INSTITUTION

Suggested Disposal Method: TRANSFER TO OUTSIDE INSTITUTION
Contact name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
Shipping Document Number:
Date Shipped:
Receiving Institution:
Transferring Grant (if applicable):

When to use: Asset is being transferred at no cost to another University or Non-Profit Research Institution. This action is highly restricted and requires written authorization. Contact your UPA first!

DUPLICATE RECORD

Suggested Disposal Method: DUPLICATE RECORD
Contact name/phone:
Correct (2nd) SUID Tag Number:

When to use: Asset has been inadvertently recorded in SFA twice, and one record must be removed from the system.

SHIP TO SPONSOR

Suggested Disposal Method: SHIP TO SPONSOR
Contact name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
Shipping Document Number:
Date Shipped:

When to use: Asset was furnished by sponsor (government or other), and is being returned to the sponsor agency at the close of the period of the agreement/award. Or asset is a deliverable on a contract and is being shipped to the sponsor.

RETURN TO EMPLOYEE

Suggested Disposal Method: RETURN TO EMPLOYEE
Contact name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
Date Shipped:

When to use: Asset is owned by a University staff member, is recorded in SFA, and the employee is now leaving the University. Generally used only for Fellowships. Computers MUST be sanitized!

CANNIBALIZATION
PRIOR UPA APPROVAL REQUIRED!

Suggested Disposal Method: CANNIBALIZATION
DPA name/phone:
EH&S or ITSS Sanitization Certification (Y/N):
Date of cannibalization (approx.):
Additional Information/Reason for Cannibalization:

When to use: Asset is being taken apart for parts to be used in other equipment. CALL UPA FIRST!

NON CAPITAL

Suggested Disposal Method: NON-CAPITAL
Contact Name/phone:
PO Number:

When to use: Record created in error - asset is not capital and the department does not want to maintain a record for it.