

Closing Down an Office / Research Lab / Centre / Institute

This document provides guidelines pertaining to **moveable equipment assets*** only for units to follow when their office/lab/centre is closing or decommissioning. Register refers to the central PeopleSoft Asset Management Register that tracks University moveable equipment assets. Senior administration in the unit are responsible for ensuring any assets purchased by research grants are being decommissioned or disposed of by approved methods stipulated in the research grant.

The first step is to complete an inventory for the area. From this list assembled, the following can occur:

1. **Equipment Transfers (Internal)**

- Equipment can be transferred with researchers or staff to their new unit or originating unit.
- Equipment can be transferred to other units on campus.
For both of these methods, refer to the UAPPOL procedure [Equipment Asset Disposal/Retirement Procedure](#) and complete the [Asset Disposal Form - Transfer or Sale \(Internal\) to Another University Unit form](#). If there are costs associated with the physical movement of the equipment, this should be determined prior to signing the form. SMS-Distribution Services ([Dispatcher](#)) can be contacted to arrange the move.

2. **Donation of Equipment**

Equipment can only be donated to registered charities. This often includes other teaching institutions and schools or charitable organizations.

For this method, refer to the UAPPOL procedure [Equipment Asset Disposal/Retirement Procedure](#) and complete the [Asset Disposal Form – Donation to Registered Charity form](#). For donations valued at or greater than \$5000.00, signatures must be obtained by the appropriate Vice President's office depending on the source funding for the equipment prior to the donation. Donations under \$5000.00 can be signed off by the Dean, Chair or Director of the unit.

3. **Selling University Equipment (External)**

Equipment can only be sold to prospective buyers or advertised for sale through SMS-Surplus Services. All equipment sales are processed through Surplus Services to protect the University from conflicts of interest in selling University equipment assets. University staff may purchase advertised items as external agents.

For this method, complete a [Surplus Disposal form](#) and contact [SMS-Surplus Services](#) to request a surplus declaration number and coordinate the sale. SMS will process the sale and return proceeds to the unit.

4. Surplus

Equipment deemed no longer useful to a unit, broken, impaired, or leftover can be picked up for removal by SMS-Surplus Services.

For this method, complete a [Surplus Disposal form](#) and contact [SMS-Surplus Services](#) to request a surplus declaration number and to coordinate the pickup and removal. Tagged equipment assets picked up by Surplus will be removed from the Register as long as the tag numbers are recorded on the form.

5. Selling Equipment to Staff

Computers and other data storage devices may not be sold to University staff unless they are leaving the employment of the University by means of resigning, retiring, or position disruption and those items were used exclusively by those staff members and purchased from Professional Expense Reimbursement (PER) or unit operating funds. If this is the case, gifts or sales can be made to departing staff. All University licensed software and intellectual property must be removed from the computers or other media devices prior to gifting.

For this method, refer to the UAPPOL procedure [Equipment Asset Disposal/Retirement Procedure](#) and complete the [Asset Disposal Form – Asset Retirement form](#). A fair market evaluation is required by SMS-Surplus Services on any equipment/furniture and the total gift must not exceed \$500. The departing staff member may opt to pay the difference between the allowable gift maximum and the assessed value of the goods.

Contact Information:

Surplus Coordinator – (780) 492-5393 email: smssurp@ualberta.ca

To coordinate the pickup and removal surplus equipment, office supplies, and miscellaneous pieces for disposal and to coordinate the removal and storage of all furnishings (furniture/chairs/desks/filing cabinets/tables)

SMS Distribution Services Dispatcher – (780) 492-4122 email: dispatcher@ualberta.ca

To coordinate moves of equipment and furnishings

If you have any questions, please contact Equipment Services

Phone: 780-492-8899/8895

Email: equipment.services@ualberta.ca

Website: [www.sms.ualberta.ca/ DistributionServices/EquipmentServices](http://www.sms.ualberta.ca/DistributionServices/EquipmentServices)

**Moveable equipment assets include assets tagged and tracked on the PeopleSoft Asset Management Register and any untagged equipment. This guideline can also apply to office supplies and furnishings.*