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	
Service Center Name	

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.

DPA	SCM/FC	DFA/ASM
Printed Name:	Printed Name:	Printed Name:
Signature:	Signature:	Signature:
Date:	Date:	Date:

Flowchart of Capital Equipment Department Validation Process

DPA	**SCM/FC**	**DFA/ASM**

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!