

Donated Equipment Documentation Transmittal Form

Purpose: Checklist to ensure proper documentation for incoming donations of equipment.

Instructions:

1. Section I and II to be completed by Department and/or Department Property Administrator (DPA) as indicated.
2. Section III to be completed by Property Management Office (PMO)

Section I – Donor/Department Information	
Department Receiving Donation:	DPA Name:
Date Equipment Received:	Capital equipment? Yes ___ No ___ (See Note 1) Non Capital Equipment? Yes ___ No ___ (See Note 2)
PI Name:	Dept. Gift Account No:
Documents Attached: <i>(Check all that apply)</i> <input type="checkbox"/> Letter of Intent <i>(from Donor)</i> <input type="checkbox"/> Donation Agreement <i>(if any)</i> <input type="checkbox"/> Itemized List of All Equipment Being Donated <input type="checkbox"/> Packing List/Shipping Documents <input type="checkbox"/> IRS 8283 Form <i>(if applicable)</i> <input type="checkbox"/> Proof of Value <i>(ie: Appraisal, Invoice, Receipt)</i> <input type="checkbox"/> Other, <i>(Please specify)</i> <div style="text-align: right;"><i>(See Notes 2,3,4,5)</i></div>	Donor Name and Address: Donor Tax ID# _____ <div style="text-align: center;"><i>(Provided by Donor)</i></div> <i>(Contact PMO if you do not have this information—Do not call Donor directly)</i>
Section II – Dept/DPA Accounting Process	
Actions to be completed by Department Administrator and/or DPA within 30 days of receipt of donated equipment	
<ol style="list-style-type: none"> 1. Make copies of all documentation Checked off in Section I 2. Identify capital equipment items and tag with Stanford Barcode tag and Donation overlay. 3. Create a one dollar (\$1.00) Standard.Capital Purchase Requisition in iProcurement system, with required attributes as specified below: <ol style="list-style-type: none"> a. Use Donor's name for Vendor name b. Use Gift account: Account Range = GAAAA-JXZZZ (Account must be in this range) c. Expenditure type (ET)=53125 (Must use this ET) 4. Create an on-line receiving event in Oracle iProcurement system once PO is generated. 5. Create records in Sunflower (SFA) property management database. <ol style="list-style-type: none"> a. Use Receiving date for Acquisition date b. Use \$0 for Acquisition cost c. Include list of tag numbers with attached documentation. 6. Forward this completed form with all documentation to Property Management Office (PMO), Attn: Donations Department; email to your University Property Administrator (UPA), or fax to 5-7870. 	
Section III – PMO Accounting Process	
Actions to be completed by Property Management Office/Accounts Payable	
<ol style="list-style-type: none"> 1. Review packet received from Department. 2. Reconcile with department any missing documentation/data (ie: Paperwork, SFA records, forms etc.) 3. Establish acquisition cost/Fair market value (FMV) for each item of capital equipment 4. Identify and annotate value of non-capital equipment from itemized list 5. Generate "DONATIONS – CAPITAL FMV TEMPLATE" and send to Accounts Payable 6. Generate records in Oracle Fixed Asset System 7. Update PMO Donations Spreadsheet 8. Notify Office of Development (OOD) via copy of completed documentation packet 	
Section IV – Notes and References	
Notes: <ol style="list-style-type: none"> 1. Capital Equipment: Defined as value greater than or equal to \$5000; Useful life greater than 1 year. 2. Itemized list of equipment should include both capital and non-capital equipment being donated. 3. Departments may not sign IRS or Donor acknowledgement forms. Please forward to PMO for signature. 4. Departments should send a thank you letter to donor; all other official documents should go through PMO/OOD. 5. Departments should avoid any statements to donor regarding value of donated equipment. 	
References: <ol style="list-style-type: none"> 1. Administrative Guide Memo Chapter 4-Gifts 2. Property Manual Chapter 2-Acquisitions 	