1. **How do I change the assigned employee to another employee?**
   * Send an email to [financialservices@bcoe.org](mailto:financialservices@bcoe.org) containing the department manager’s approval for the change – this will be attached to the asset as documentation.
2. **How do I create an asset if PO with Receiving was used, but the “create an asset” field was not marked with “Y-Yes”?**
   * From the activity tree, choose Finance -> Purchasing -> Receive PO Items
   * For each receipt, enter:

* Date Received
* Reference Number (Requisition or Purchase Order number)
* Receive All: No
  + Enter the number of items you are receiving in the *Receive Now* field as a negative

(e.g. -5 if there were 5 assets to create). This will force Escape to require an asset be created.

* + Select YES in the “Create Asset” field.
  + Complete the following fields:
  + Asset Group
  + Asset Category
  + Manufacturer
  + Model Number
  + Employee
* Select Go
  + Once the asset is created, use the Asset Physical Inventory module to update the room, tag number, description, serial number, status comment (condition), and responsibility code (manager code).
  + To request an asset tag, send an email to [financialservices@bcoe.org](mailto:financialservices@bcoe.org)

1. **I have never seen this asset before? What is an Aruba 105 (i.e.)?**
   * Type the item description into an online search engine to locate what the item looks like.
2. **This asset is not our item and belongs to another department.** 
   * With the department manager’s approval, contact the Inventory Agent and Manager of the other department to request that the asset be changed to their department.
   * Upon both department Manager’s consent to make the department change, then it may be changed.
   * Do NOT change departments without prior approval from the other department’s Manager.
3. **May 1st is not a convenient time for our department to complete the inventory process.**
   * The inventory process for each department is flexible in that it can be completed any time prior to May 1st of the current fiscal year. For example, if January is a better month, it is appropriate to complete the department’s inventory at that time.
   * Once the inventory process is complete, contact [financialservices@bcoe.org](mailto:financialservices@bcoe.org) advising that the inventory process is complete and ready for review.
4. **How do we assign an asset to an Independent Contractor (IC)?**
   * Assets used by Independent Contractors will be assigned to the manager they report to.
   * Enter IC’s name in the Room field of the asset information.
   * Internal departmental tracking is strongly recommended.
5. **How do we assign an asset to a Temporary Service Contractor (TSC)?**
   * Assets used by Independent Contractors will be assigned to the manager they report to.
   * Enter TSC’s name in the Room field of the asset information.
6. **How do I dispose of an asset is no longer functioning?**

* If an item is deemed no longer needed or is not in proper working condition, use a BSF-100 to request ITS pickup and dispose of the item or to return an asset to M&O.

<https://core-docs.s3.amazonaws.com/documents/asset/uploaded_file/143070/bsf-100_property_disposal_REV_MAR_14_18.doc>

* Follow instructions listed in Administrative Service, Operating Procedure, Disposal. The operating procedures are in accordance with SP 3270 (a-b).

<https://core-docs.s3.amazonaws.com/documents/asset/uploaded_file/396466/Disposal_oper_procedure_2019.pdf>

* ITS/M&O will complete the disposal process of the asset, including updating the status in Escape. The department should review the asset to confirm that it has been updated in Escape.
* The Assigned Employee and Manager Code will be removed from the asset listing.
* Email the signed copy of the BSF-100 to [financialservices@bcoe.org](mailto:financialservices@bcoe.org). The completed form will be attached to the Asset in Escape.
* The department may retain a copy of the BSF-100 for their own reference.

1. **How do I know when assets are added to the department’s inventory?**
   * It is recommended that Inventory Agents complete an FA01 regularly to identify new assets and update them.
   * On the Activity Tree, choose Finance -> Reports -> Admin -> FA01
   * On the FA01 search page, under section 2- Filter Options -> Department-> Select your Department
   * On the search page, under section 2- Filter Options: Type -> I {Inventory Assets}
   * On the search page, under section 2- Filter Options: Starting Receive Date -> Enter beginning date
   * On the search page, under section 2- Filter Options: Ending Receive Date -> Enter ending date
   * On the right side, select Sort Option G: Employee-Location
   * Select Go
   * This report can be set up as a recurring report in Escape and be sent to the Inventory Agent and/or Manager for appropriate action.
2. **What happens when an employee leaves BCOE?**
   * Access the Resignation/Termination HR-39 form using the following link

<https://core-docs.s3.amazonaws.com/documents/asset/uploaded_file/72995/Resignation_-_termination_form_-_HR39.doc>

* + Complete the document including the Check List and To Do List.
  + To complete the Asset Agreement, use the following suggested steps:
    - Print an Employee Issued Asset Agreement, which is an Employee 21c report.
    - On the Activity Tree, choose Reports -> Admin -> Employee 21
    - On the search page, under section 2 – User Options: Employee ID -> Enter employee’s name using the dropdown menu.
    - On the right side, select Sort Option C- Defined in Request Agreement: G-Employee-Location with Asset Loc/Room.
    - Meet with Employee to identify each asset, receive each asset, and check off on Employee 21c.
    - The employee then signs the report acknowledging that items are returned.
    - The manager signs the report acknowledging that items are returned and in their possession.
    - Annotate the agreement by replacing the departing employee’s name with either the manager’s name or the name of another employee to be assigned.
    - Email a copy of the signed Employee 21c report to [financialservices@bcoe.org](mailto:financialservices@bcoe.org) to attach to each asset in Escape.
    - The manager maintains the original Employee 21c.

1. **What if I received an asset and there is no asset tag?**

* If an asset, whether new or existing, needs an asset tag, contact [financialservices@bcoe.org](mailto:financialservices@bcoe.org) advising the asset number that needs a tag created.
* The tag will be made and delivered to the Inventory Agent for the tag to be attached to the item.

1. **What if a mifi/cell phone/key goes missing or is stolen?**
   * Notify M&O of the asset’s status at [maintenance@bcoe.org](mailto:maintenance@bcoe.org) as soon as possible as mifi and cell phone service costs continue even when the item is lost.
   * M&O will provide specific instructions as to obtaining a replacement.
   * Mifi and cell phone service transfers may be subject to a transfer fee.
2. **How is the price of the asset calculated?**
   * An asset’s total cost includes the purchase price, sales tax, cost to ship the item, and other acquisition fees.
   * If there are multiple items on a purchase order with one cost for shipping, divide the cost of the shipping by the total number of items on the purchase order.
3. **What if an asset was returned to the vendor?**

* Using the Activity Tree, choose Assets->Asset Physical Inventory
* In the Search Criteria, under section 2-Description, enter the Asset ID # and then select Go.
* Using the scroll bar at the bottom of the page, move to the right side of the page to locate the columns STATUS and STATUS COMMENT.
* Update STATUS with the dropdown menu, selecting D-Disposed.
* Update STATUS COMMENT by typing DISP in the field.
* Update Disposal Method with the dropdown menu, selecting Error-Error.
* Delete current Employee Assigned and Manager Code.
* Disposal Comment can be used for specific notes as to the reason for the return to vender.
* Go to the top left of the page to select Task -> Post.

1. **What if two employees of one department share computers at several sites?**
   * The asset would be assigned to the manager at each of the specific site.
   * If there is only one manager for both sites, then that manager would be the employee assigned.
   * Use the Room field to list the employees’ initials who are using the asset.
2. **Is it possible to search/update for certain assets using the Inventory Module?**
   * Using the Activity Tree, choose Finance -> Assets -> Asset Physical Inventory
   * On the search page, under section 2- Description: Asset ID
   * Enter the asset numbers separated by commas (e.g. 4452,2287,3344)
   * Select Go
3. **What if I don’t have the Fixed Asset Module or the Asset Physical Inventory Module?**

Send an email to [ss@bcoe.org](mailto:ss@bcoe.org) requesting permission to the specific module needed with a CC to the department manager.

1. **What is the Fixed Assets Module?**

* The Fixed Assets Module gives a more in-depth view of the asset in a “Read Only” capacity.
* Any changes to an asset need to be made in Inventory Module.
* On the Search screen, under section 1 – Description: Asset ID -> to enter one or multiple Asset IDs. For multiple asset IDs, separate them using commas (e.g. 4452,2287,3344).
* Select Go
* Multiple tabs are available for viewing. Select a tab to review by clicking on it.
* The “History” tab shows any changes to the asset by date and shows the employee who made the update.
* The “Attachment” tab shows any attachments related to the asset. If a department would like to add an attachment, PDFs can be sent to [financialservices@bcoe.org](mailto:financialservices@bcoe.org).
* The “Notes” tab shows any notes made by specific employees.

1. **What value do we enter for donated items?**

Since the asset cost was zero, then the value in the Acquisition Cost would be zero.