1. **How do I change the assigned employee to another employee?**
	* Send an email to 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
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 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. 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 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 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 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 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.
* 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.