Brandeis University

Office of the
Financial Affairs and
Treasury Services

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TO: **University personnel responsible for purchasing equipment**

FROM: **Robert Butler, Jr., Controller**

RE: **Revised Equipment Acquisition Form &**
New Tagging Procedures

****Effective immediately, the Controller's Office has revised the Equipment Acquisition Form and implemented new equipment tagging procedures.****

Equipment Acquisition Form:

The updated Equipment Acquisition Form can be found at the following location and should be used exclusively going forward: http://www.brandeis.edu/financialaffairs/forms/controller-forms.html.

Several sections of the Equipment Acquisition Form have been revised and Section V was added as an instrumental piece of our new tagging procedures.

University personnel who are completing a Requisition to purchase equipment for $5,000 or greater must complete Sections I and II of the Equipment Acquisition Form and submit it along with the Requisition to the Office of Procurement. No requisitions will be processed without an accompanying Equipment Acquisition Form for any equipment $5,000 or greater.

New Tagging Procedures:

The Controller's Office is implementing the following new tagging procedures immediately for all equipment purchased or fabricated with a value of $5,000 or greater.

- As stated above, Equipment Acquisition Forms must be sent to the Office of Procurement with Requisitions for all equipment $5,000 or greater. The Office of Procurement will scan a copy of the Equipment Acquisition Form to the Controller's Office.

- The Controller's Office will review the Equipment Acquisition Forms and will complete Section IV of the form. An inventory tag will be assigned and affixed to the form.

- The Equipment Acquisition Form and inventory tag will be sent via interoffice mail to the individual at the department who originally prepared and submitted the Equipment Acquisition Form. This individual should receive and hold the Equipment Acquisition Form and tag until the respective equipment has arrived.

- Once the respective equipment has arrived, the individual must immediately tag the equipment and complete Section V of the Equipment Acquisition Form entirely.

- The completed Equipment Acquisition Form must be scanned to ppe@brandeis.edu.

- The Controller's Office will track and monitor the outstanding Equipment Acquisition Forms. All outstanding forms will be investigated until the completed form has been received.

Below is informational for your use in selecting the appropriate "Account" as you complete Requisitions and Equipment Acquisition Forms:

Guidelines for the "Account" field on the Requisition and/or Equipment Acqusition Forms:		
7405	Software < 5000	This group of accounts should only be used for individual purchases $4,999.99 or below.
7407	Equip = 2500.01 to 4999.99 *	
7408	Equip < 2500	
7409	Furniture < 5000	
7411	Accommodate Equip < 5000 **	
*	To be specificaly used for equipment $2,500.01 to $4999.99 purchased on a grant (6 digit number, starts with a 4)	
7412	Software Licenses & Support	This account should be used only for non-equipment purchases that relate to licensing, service & support.
7414	Software >= 5000	This group of accounts should only be used for purchases $5,000 or above.
7417	Equipment >=5000	
7418	Furniture >= 5000	
7420	Accommodate Equip >=5000 **	
8117	CAF Equip =>5000	This group of accounts should only be used for purchases $5,000 or above associated with a capital project (anything with a 9 digit CAF number).
8118	CAF Furniture => 5000	
** These accounts should only be used for purchases specifically for documentated disability needs.		

If there are any questions, please contact:

Rob Butler x68317
Jon Church x64485 or
Jaclyn Simon x64822