

PROPERTY CONTROL



Q & A SESSION

AUGUST 13, 2026

10:00 AM – 11:00 AM

TOPIC: PHYSICAL INVENTORY

FACILITATOR: CONNIE JUMP

Meeting Agenda

- ▶ Introduction
- ▶ The “Why” of physical inventory
- ▶ Physical Inventory process
- ▶ Importance of timely completion
- ▶ Questions regarding physical inventory
- ▶ Review
 - ▶ Changes in location and PI
 - ▶ Requisition
 - ▶ Disposals
- ▶ Questions regarding anything else related to capital equipment
- ▶ Next Session & Topic

Why?

- ▶ Per UW System Administrative Policy 334 a physical inventory must be completed **once every two years** to verify that the capital equipment listed on the inventory records can be located and is in use.
- ▶ What is targeted?
 - ▶ Federally owned equipment (F Tags) (100%)
 - ▶ 133 & 144 Funded equipment (100%)
 - ▶ Capital assets with cost >\$1M (100%)
 - ▶ Sampling of other assets

Department notification

- ▶ Notification to the department of the intent to conduct physical inventory early summer 2026
- ▶ Option to chose your dates (within reason)
- ▶ Option to utilize the rotational employee's assistance program
- ▶ Scheduled inventories will begin in September and end in April
- ▶ One month to complete

Notification

FY27 Inventory Snapshot						
Division	Colledge of Engineering			LINK TO CAPITAL EQUIPMENT WEBPAGE		
Cost Center Hierarchy	CCH001311 - UWMSN CCHL8 COE Mechanical Engineering					
Asset Coordinator	Kathryn Rasmussen			LINK TO PHYSICAL INVENTORY PROCEDURE		
Financial Contact	Adam Whitehorse					
Department Chair	Darryl Thelen					
Start Date	8/5/2026					
Due Date	9/4/2026					
	Total Asset Count	Federally Titled Count	University Titled Count	Total Asset Costs	Federal Costs	University Costs
Assets to be Inventoried	578	7	571	\$ 23,088,835.31	\$ 213,803.82	\$ 22,875,031
Loaned Assets (Not Applicable to Physical Inventory)	3	0	3	\$ 297,764.11	\$ -	\$ 297,764
BUILDINGS WHERE ASSETS ARE LOCATED						
LINK TO FACILITY LIST						
BUILDING NUMBER	# OF ASSETS ON SITE					
ARS Arling-Hqtrs-Tire Storage-0936	1					
Engineering Centers Building-0481	62					
Engineering Hall-0408	28					
Engineering Research Building-0762	129					
KRC-SRC-Tantalus-1170	6					
Materials Science and Engineering Bldg-0520	2					
Mechanical Engineering Building-0407	336					
UW Hospital Clinic - Research Park-0755	1					
Wisconsin Energy Institute-0752	2					
Wisconsin Institute for Discovery-0212	11					
0498 - OFF-SITE ASSETS						
LINK TO OFF-CAMPUS PROPERTY VERIFICATION FORM			LINK TO ASSET LOAN REQUEST FORM			
ASSET TAG #	STILL OFF-SITE?	OFF-SITE ADDRESS	UW EMPLOYEE ON SITE? (IF NOT, COMPLETE LOAN REQUEST FORM)	RESPONSIBLE EMPLOYEE NAME	OFF CAMPUS PROPERTY VERIFICATION FORM ON FILE?	
U046950	Yes	Team Wendy, 17000 St. Clair Avenue, Bldg. 1. Cleveland,	UW24-014	Christian Franck		
U047812	Yes	Team Wendy, 17000 St. Clair Avenue, Bldg. 1. Cleveland,	UW24-014	Christian Franck		
U048793	Yes	Team Wendy, 17000 St. Clair Avenue, Bldg. 1.	UW24-014	Christian Franck		
ADDITIONAL INFORMATION NEEDED SEE TAN HIGHLIGHTED CELLS IN TABS BELOW						
**PER UNIFORM GUIDANCE SYSTEM REQUIREMENTS, MISSING INFORMATION MUST BE UPDATED BY END OF PHYSICAL INVENTORY						
	# ASSETS MISSING BUILDING	# ASSETS MISSING ROOM NUMBERS	# ASSETS MISSING MANUFACTURER NAME	# ASSETS MISSING MODEL NUMBERS	# ASSETS MISSING SERIAL NUMBERS	# ASSETS MISSING RESPONSIBLE EMPLOYEE NAMES
ASSETS TO BE INVENTORIED	0	25	8	27	13	0
**IF A TRANSFER OF CUSTODY TO A NEW DEPARTMENT NEEDS TO BE COMPLETED:				SUBMIT A PROPERTY TRANSACTION FORM		
**IF AN ASSET LISTED ON YOUR REPORT HAS BEEN PREVIOUSLY DISPOSED OR CANNOT BE FOUND:				SUBMIT A DISPOSITION REQUEST FORM		
**IF AN ASSET WAS PREVIOUSLY SENT TO SWAP-SUBMIT A DISPOSITION REQUEST FORM ALONG WITH DOCUMENTATION BETWEEN YOUR DEPARTMENT AND SWAP.						
**IF AN ASSET CANNOT BE FOUND AND DPA CANNOT DETERMINE WHAT HAPPENED TO THE ASSET OR NO SUPPORTING DOCUMENTATION-ITEM IS CONSIDERED LOST.						
*BUSINESS ASSET DISPOSITION REQUEST MUST BE SUBMITTED THROUGH WORKDAY AND THE ATTESTATION BOXES MUST BE CHECKED, EACH ITEM MUST BE COMPLETED BY THE DEPARTMENT.						
*IF THE ASSET WAS PURCHASED IN THE LAST 3 YEARS BASED ON ACQUISITION DATE OR IS FEDERALLY TITLED, DPA NEEDS TO SUBMIT A COMPLETED POLICE REPORT FOR THE LOST ASSET.						

Spreadsheet

INSTRUCTIONS

- 1.) After the inventory item has been found, and the information has been verified, place a 'Y' in column A. If item cannot be found, place an 'N' and indicate reason in the DPA Notes column.
- 2.) Make any notes regarding the asset (ie. Disposed of, custodian change, etc.) in the DPA Notes column. If item will be disposed of, a disposal request will need to be completed in Workday. Please note on this report in the DPA column if a disposal request was made.
- 3.) Enter any changes into the green columns, if nothing has changed, leave blank.
- 4.) Complete any missing information in the tan boxes.

Condition code	Definition
1 = New	Property which is in new condition or unused condition and can be used immediately without modifications or repairs
4 = Usable	Property which shows some wear but can be used without significant repair.
7 = Repairable	Property which is unusable in its current condition but can be economically repaired.
X = Salvage	Property which has value in excess of its basic material content, but repair or rehabilitation is impractical and/or uneconomical.
S = Scrap	Property which has no value except for its basic material content.

DPA Verified? Yes or No	DPA Notes	Asset ID	Asset ID	Coordinating Cost Center	Location (Bldg#/Floor/Room #)	New Bldg	New Room	Condition Code	New Condition Code	Manufacturer	Mfr Model	Mfr Serial#	PO#	Acq Date	Cost	Acquisition	Department Property Administrator	Responsible Employee Name	Last Physical Inventory	Asset Description
		U027328	BAS-00010215	CC004031	Mechanical Engineering Building-0407			1 - Excellent		KINOVA	KINOVA MICO2 A	PJ0065001915300000	612K485	12/17/2015	24,685	Purchased	Kathryn Rasmussen	Mike Zinn	3/10/2021	ROBOT, ROBOTIC
		U027480	BAS-00010278	CC004031	Mechanical Engineering Building-0407-01-1042			1 - Excellent		SCHENCK PROCESS LLC	V621453B01	110029975670ALOWS	639K435	2/22/2016	42,431	Purchased	Kathryn Rasmussen	Lih-Sheng Turing	7/5/2024	FEEDER, FEEDER
		U032673	BAS-0002372	CC004031	Mechanical Engineering Building-0407-B1-B1172			1 - Excellent		POLYTEC INC	MPV-800	0267439/0267416/026778K212	1/11/2018	671,785	Purchased	Kathryn Rasmussen	Melih Eriten	3/14/2023	Multi-Point Laser	
		U036076	BAS-0002589	CC004031	Engineering Research Building-0762-01-0138			1 - Excellent		HYDROTHERMAL CORP	VARIOUS	CRESSGS480480K3P	GK1206	4/16/2019	18,923	Purchased	Kathryn Rasmussen	Gregory Nellis	3/10/2021	STEAM GENERATOR
		U038177	BAS-0002693	CC004031	Mechanical Engineering Building-0407-02-2245			1 - Excellent		FABRICATED ASSET_ VARI	N/A	N/A	916K532	8/26/2019	56,847	Purchased	Kathryn Rasmussen	Dakotah Thompson	3/10/2021	CUSTOM LASER
		U038003	BAS-0002722	CC004031	Engineering Centers Building-0481-02-2043			1 - Excellent		NIKON INSTRUMENTS, INC.	AL-SHRM-C	S02060	897K234	10/29/2019	575,193	Purchased	Kathryn Rasmussen	Christian Franck	3/14/2023	Multiphoton Micro
		U040809	BAS-0002935	CC004031	Mechanical Engineering Building-0407-03-3054			1 - Excellent		MARKFORD INC	ONYX PRO GEN	FBQB8F25-AA08-480	007L291	11/27/2020	11,493	Purchased	Kathryn Rasmussen	Darryl Thelen	3/14/2023	ONYX PRO GEN
		U051534	BAS-00030516	CC004031	Mechanical Engineering Building-0407 Floor 02			1 - Excellent		FABRICATED ASSET_ VARI	N/A	N/A		6/30/2025	14,236	Purchased	Kathryn Rasmussen	Scott Sanders		OPTICAL SENSOR
		U044665	BAS-0003322	CC004031	Mechanical Engineering Building-0407-03-3163			1 - Excellent		FORGE NANO INC	PANDORA	FN1447-PAND-B22121	0281362	12/9/2022	195,095	Purchased	Kathryn Rasmussen	Eric Kazyak	6/12/2023	PANDORA RESEA
		U044879	BAS-0003435	CC004031	Mechanical Engineering Building-0407-B1-B1174			1 - Excellent		EVIDENT SCIENTIFIC	OLSSI-SU	2A49539	0264375	2/22/2023	124,821	Purchased	Kathryn Rasmussen	Eric Kazyak	6/12/2023	LASER MICROSC
		U046027	BAS-0003454	CC004031	Engineering Research Building-0762-05-0507			1 - Excellent		ACE COMPUTERS	LOGICAD 797J	1355780010001	0331844	5/20/2023	29,894	Purchased	Kathryn Rasmussen	Curt Bronkhorst	6/26/2023	WORKSTATION, I
		U045927	BAS-00034618	CC004031	Engineering Centers Building-0481-02-2043			1 - Excellent		NIKON INSTRUMENTS INC	Ti2E	551020	0317715	5/22/2023	216,869	Purchased	Kathryn Rasmussen	Jing Zhang	8/9/2023	NIKON AX CONF
		U046034	BAS-0003456	CC004031	Mechanical Engineering Building-0407 Floor 03			1 - Excellent		FRANKA EMIKA GMBH	RESEARCH3	290102-1324496	0351550	5/5/2023	26,134	Purchased	Kathryn Rasmussen	Xiangru Xu		ROBOT ARM, FRA
		U046171	BAS-0003466	CC004031	Mechanical Engineering Building-0407-03-3163			1 - Excellent		JH TECHNOLOGIES INC	CP-8000+	COXCP-222034	0307044	5/1/2023	93,975	Purchased	Kathryn Rasmussen	Eric Kazyak	8/17/2023	POLISHER, ION M
		U046297	BAS-0003487	CC004031	Mechanical Engineering Building-0407 Floor 03			1 - Excellent		UFACTORY TECHNOLOGY	RB-UFA-23	XS130308B22B11	0370987	6/12/2023	13,342	Purchased	Kathryn Rasmussen	Xiangru Xu		ROBOTIC ARM, U
		U046343	BAS-0003498	CC004031	Mechanical Engineering Building-0407-B1-B1184			1 - Excellent		DELL MARKETING LP	5820	9YRCWx3	0375135	6/25/2023	5,763	Purchased	Kathryn Rasmussen	Lianyi Chen	10/19/2023	DELL PRECISION
		U046082	BAS-0003502	CC004031	Mechanical Engineering Building-0407-03-3163			1 - Excellent		VIGOR TECH USA	SG240011000TS	GLB-42-6814	0304177	6/19/2023	75,500	Purchased	Kathryn Rasmussen	Eric Kazyak		GLOVEBOX SYS
		U046566	BAS-0003554	CC004031	Mechanical Engineering Building-0407-02-2233			1 - Excellent		HALDEMAN HOMME	9900200	180659556	814K295	5/11/2018	10,651	Purchased	Kathryn Rasmussen	James Pikul	3/7/2024	5' FUME MICRO, 5
		U047039	BAS-0003564	CC004031	Engineering Research Building-0762-13-1338			1 - Excellent		LENOVO	P620	MJ0KQLTQ	0375789	8/1/2023	11,850	Purchased	Kathryn Rasmussen	Gregory Nellis	9/26/2023	THINKSTATION P
		U047620	BAS-0003586	CC004031	Engineering Research Building-0762-08-0812			1 - Excellent		QUANTIFI PHOTONICS USA	NI-PXIE-1088	323FF3A	0367827	8/1/2023	39,640	Purchased	Kathryn Rasmussen	Ramathanan Thevama	12/7/2023	VELOCIMETRY S
		U047770	BAS-0003588	CC004031	Mechanical Engineering Building-0407-03-3163			1 - Excellent		MTI CORPORATION	MSK113PVM	PE24622B047	0367200	8/9/2023	27,073	Purchased	Kathryn Rasmussen	Eric Kazyak	10/9/2023	COMPACT VACU
		U047771	BAS-0003588	CC004031	Mechanical Engineering Building-0407-03-3163			1 - Excellent		MTI CORPORATION	MSK-H200SR	03020103-168	0367200	8/9/2023	22,573	Purchased	Kathryn Rasmussen	Eric Kazyak	10/9/2023	MULTIFUNCTIONA
		U047401	BAS-0003609	CC004031	Engineering Centers Building-0481-02-2043			1 - Excellent		NIKON INSTRUMENTS INC	Ti2E	550878	0355560	9/1/2023	111,021	Purchased	Kathryn Rasmussen	Christian Franck	11/20/2023	MICROSCOPE SY
		U047821	BAS-0003613	CC004031	Mechanical Engineering Building-0407-02-2233			1 - Excellent		BIOLOGIC	VMP-3	1318	0401328	9/5/2023	19,115	Purchased	Kathryn Rasmussen	James Pikul	3/7/2024	POTENTIOSTAT
		U047822	BAS-0003613	CC004031	Mechanical Engineering Building-0407-02-2233			1 - Excellent		OLYMPUS CORPORATION	BX41TF	T5SN	0401328	9/5/2023	6,085	Purchased	Kathryn Rasmussen	James Pikul	3/7/2024	MICROSCOPE
		U047824	BAS-0003613	CC004031	Mechanical Engineering Building-0407-02-2237			1 - Excellent		INSTRON CORP	68SC-2	B21327	0401328	9/5/2023	26,654	Purchased	Kathryn Rasmussen	James Pikul	3/7/2024	INSTRON MECHA

Scanners vs Spreadsheet

There are currently two phases to using the scanning equipment

Phase 1-Receive scanning equipment, a spreadsheet of all assets needing to be inventoried, and a .pdf file listing each of the assets with a location barcode. The scanners now allow you to not only change Building and Room, but you can change the PI, serial #, model #, and the condition code as well.

Phase 2- Once scanning information is loaded to our system, we will then provide you with an Excel spreadsheet listing the assets that were not initially found by scanning. You then have 2 weeks to locate the remaining items, return the spreadsheet to us so that we can finalize your inventory.

UW Physical Inventory Report for Cost Center:			CC002261	May 6, 2026
Room	Biochemical Sciences, DeLuca, Hector		Assets in this location	
	F-0204-B1-B1301		3	
<u>Asset Identifier</u>	<u>Asset ID</u>	<u>Manufacturer</u>	<u>Model Number</u>	<u>Serial Number</u>
U024414	BAS-00009497	KAVANAUGH RESTAURANT SUPPLY INC.	E5	1501213091723
<u>Cost Center</u>	<u>Purchase Order</u>	<u>Date Acquired</u>	<u>Asset Cost</u>	<u>Acquisition Method</u>
CC002261	591K802	Jun 11, 2015	7478.78	Purchased
<u>Asset Coordinator</u>		<u>Issued To</u>	<u>Condition Code</u>	<u>Last Physical Inventory</u>
Shannon Conner		Timothy Hough	1 - Excellent	Jun 16, 2025
<u>Description</u>				
OVEN, CONVECTION, MERRYCHEF USA MODEL NO. E4 MICROWAVE CONVECTION OVEN, EIKON CONVECTION, AIR IMPINGEMENT AND MICROWAVE SPEED OVEN, WITH ACCESSORIES.				
<u>Asset Identifier</u>	<u>Asset ID</u>	<u>Manufacturer</u>	<u>Model Number</u>	<u>Serial Number</u>
U015006	BAS-00019538	IBM	4852566	41A7622
<u>Cost Center</u>	<u>Purchase Order</u>	<u>Date Acquired</u>	<u>Asset Cost</u>	<u>Acquisition Method</u>
CC002261	199K010	Jul 2, 2010	5290	Purchased
<u>Asset Coordinator</u>		<u>Issued To</u>	<u>Condition Code</u>	<u>Last Physical Inventory</u>
Shannon Conner		Jim Wysocky	1 - Excellent	Oct 19, 2018
<u>Description</u>				
TERMINAL, POINT OF SALE, IBM SUREPOS 500 TERMINAL - CASH REGISTERS, UNIT NAME: BADGER MARKET BIOCHEM, HOST NAME: NV-0143, NV DEVICE ID: 1502				
<u>Asset Identifier</u>	<u>Asset ID</u>	<u>Manufacturer</u>	<u>Model Number</u>	<u>Serial Number</u>
U017960	BAS-00019539	IBM	4852566	41C1284
<u>Cost Center</u>	<u>Purchase Order</u>	<u>Date Acquired</u>	<u>Asset Cost</u>	<u>Acquisition Method</u>
CC002261	199K010	Jul 2, 2010	5290	Purchased
<u>Asset Coordinator</u>		<u>Issued To</u>	<u>Condition Code</u>	<u>Last Physical Inventory</u>
Shannon Conner		Jim Wysocky	1 - Excellent	Oct 19, 2018
<u>Description</u>				
TERMINAL, POINT OF SALE, IBM SUREPOS 500 TERMINAL - CASH REGISTERS, UNIT NAME: BADGER MARKET BIOCHEM, HOST NAME: NV-0066, NV DEVICE ID: 1501				

FY23 Inventory Results

Division	SCHOOL OF MEDICINE AND PUBLIC HEALTH
Department	AS342XX-MEDICINE
DPA	OCHIENG, YVONNE
Start Date	1/17/2023
End Date	5/9/2023
Business Days	112

	Total Asset Count	Federally Titled Count	University Titled Count		Total Asset Costs	Federal Costs	University Costs
Total Assets	780	0	780		\$ 15,647,210	\$ -	\$ 15,647,210
Total Assets Inventoried	241	0	241		\$ 7,615,564	\$ -	\$ 7,615,564
Results of Assets Inventoried	227	0	227		\$ 7,310,743	\$ -	\$ 7,310,743
Loaned Assets (Not Applicable to Physical Inventory)	0	0	0		\$ -	\$ -	\$ -
Less Transfers Out of Department	0	0	0		\$ -	\$ -	\$ -
Less Disposed Assets	14	0	14		\$ 304,821	\$ -	\$ 304,821
Ending Total Asset	227	0	227		\$ 7,310,743	\$ -	\$ 7,310,743

FY23 PHYSICAL INVENTORY RESULTS

■ Results of Assets Inventoried ■ Less Disposed Assets ■ Less Transfers Out of Department

TOTAL ASSET COUNT	227
FEDERALLY TITLED COUNT	
UNIVERSITY TITLED COUNT	227
TOTAL ASSET COSTS	\$7,310,743
FEDERAL COSTS	
UNIVERSITY COSTS	\$7,310,743

FY23 Inventory Results: Asset Changes & Dispositions

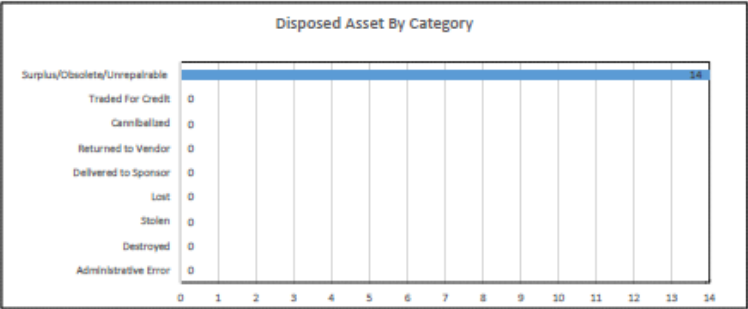
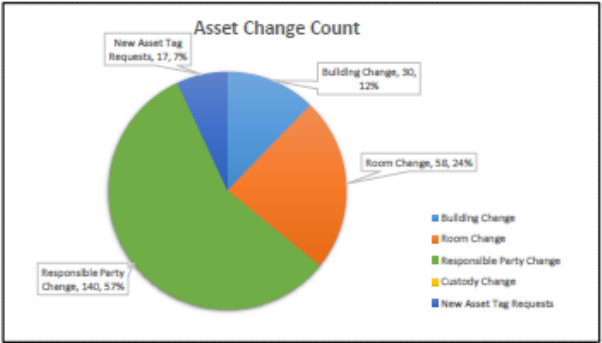
Asset Change Category	Asset Change Count	Percentage of Total Changes
Building Change	30	12%
Room Change	58	24%
Responsible Party Change	140	57%
Custody Change	0	0%
New Asset Tag Requests	17	7%
Total Changes	245	100%

Asset Disposal Category	Asset Disposal Count
Surplus/Obsolete/Unrepairable	14
Traded For Credit	0
Cannibalized	0
Returned to Vendor	0
Delivered to Sponsor	0
Lost	0
Stolen	0
Destroyed	0
Administrative Error	0
Total Disposals	14

LISTING OF DISPOSED ASSETS							
INVENTORY NUMBER	INITIAL COST	IN SERVICE DATE	NBV	DISPOSAL DATE	DISPOSAL REASON	RESPONSIBLE PARTY & ITEM DESCRIPTION	
18518	\$ 9,000	4/28/2010	\$ -	5/11/2023	SURPLUS/OBSOLETE	KOFCARD, CLAUDIA VIDEO/COMPUTER SYSTEM	
27509	\$ 5,199	8/13/2018	\$ -	8/8/2023	SURPLUS/OBSOLETE	ZARNOWSKI, ROBERT LAB REFRIGERATOR	
12708	\$ 7,803	7/22/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. FREEZER, UPRIGHT	
13542	\$ 7,300	10/6/2005	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. SPECTROPHOTOMETER	
13616	\$ 9,700	5/1/2007	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. DIFFUSION APPARATUS	
12231	\$ 6,581	10/19/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. OSCILLOMETER SYSTEM	
12232	\$ 6,580	10/19/2004	\$ 2,740	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. CENTRIFUGE	
12233	\$ 6,580	10/19/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. CENTRIFUGE	
12234	\$ 6,581	10/19/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. CENTRIFUGE	
12235	\$ 6,581	10/19/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	HERNANDEZ,KELIE L. CENTRIFUGE	
12612	\$ 6,340	6/30/2004	\$ -	3/14/2023	SURPLUS/OBSOLETE	BLIEFERNIGHT,JOAN M. FREEZER, UPRIGHT	
2262	\$ 145,306	8/25/2014	\$ -	3/14/2023	SURPLUS/OBSOLETE	HEMATTL,PEIMAN APHERESIS SYSTEM	
24444	\$ 74,169	3/1/2017	\$ -	4/19/2023	SURPLUS/OBSOLETE	HEMATTL,PEIMAN CLINICAL CALL PROCESSING SYS	
15042	\$ 6,581	5/5/2008	\$ -	4/19/2023	SURPLUS/OBSOLETE	DONOHUE,JEAN NEBUZIZER	

LOANED ASSET DETAILS						
INVENTORY NUMBER	INITIAL COST	IN SERVICE DATE	UW MADISON LOAN #	CONTRACT PERIOD	BORROWER	RESPONSIBLE PARTY & ITEM DESCRIPTION
N/A						

TRANSFERS OF CUSTODY						
INVENTORY NUMBER	INITIAL COST	IN SERVICE DATE	NBV	TRANSFERRED TO DEPARTMENT (UDDS)	DEPARTMENT NAME	ITEM DESCRIPTION
N/A						



Physical Inventory Process

Property Control sends notification of physical inventory to DPA

DPA completes attestation of inventory items

Property Control updates Workday and provides summary results to department

KEY ITEMS TO REMEMBER



Disposal request must be entered into Workday for all assets that will be disposed of.



When placing tags on equipment, please place in an area that is easy to access.



Once we send out the Inventory items that need to be located, we cannot do any changes to assets including custody transfers unless it goes through the inventory process. Thus, the reason for the time limitation for completion.

WHY timeliness is important!

- ▶ Legislative Audit Bureau Finding 2026
 - ▶ Every other year all 144 funded equipment must be accounted for
 - FY2026- 40 departments
 - 13,728 Assets
 - ▶ FY2027- 93 departments
 - 10,032 Assets

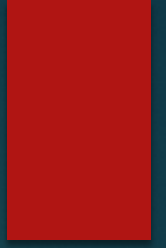
WHY timeliness is important!

FY26 TIMELINESS RESULTS	
<u>Weeks past due date</u>	<u># Departments</u>
0-4 weeks	5
5-8 weeks	13
9-12 weeks	6
13-16 weeks	5
>16 weeks	11

*time was calculated from report due date to date final report was sent to DPA



Inventory Questions





Other items



Other items needing addressed

Changes in location and PI-should be done through Transfer option in Workday AND for any transfer a reason in the comments section needs to be completed.

View Business Asset

Asset ID BAS-00037947 (ELGA WATER PURIFIER)

General Information

Company UWMSN University of Wisconsin Madison

Book Currency USD

Spend Category SC00128 - Equipment - Laboratory & Classroom

Worktags (empty)

Location CSC Med Flight Helicopter Pad-1420

Issued To Heather Floorke

Description ELGA WATER PURIFIER, PURELAB FLEX II-COMplete KIT

Memo Replaced tag due to FY26 Phys Inv. Old

Asset Shares 2

Actions

Business Asset

Additional Data

Favorite

Integration IDs

Transfer

Business Asset

Edit

Adjust Acquisition Cost

Adjust Post Acquisition Cost

Adjust Useful Life

Copy Asset

Dispose

Impair

Maintain Asset Shares

Reclassify

Remove Asset

Suspend Depreciation

Transfer

Transfer to Different Company

Spend Category SC00128 - Equip

Asset Class (empty)

Transfer Asset

Please confirm you are the Asset Coordinator of the asset before proceeding with this Asset Transfer.

Worktags should not be changed by the Cost Center Asset Tracking Specialist.

Asset Information

Asset ID BAS-00037947 (ELGA WATER PURIFIER)

Company UWMSN University of Wisconsin Madison

Currency USD

Spend Category SC00128 - Equipment - Laboratory & Classroom

Asset Name ELGA WATER PURIFIER

Description ELGA WATER PURIFIER, PURELAB FLEX II-COMplete KIT

Serial Number FLB00017038CSC K4/945

Transfer To Values

Transaction Effective Date 88 / 05 / 2026

Depreciation Adjustment Option X Depreciation Convention

Transfer To Worker X Heather Floorke

Use Worker Organization Worktags

Transfer To Location X UW Universities of Wisconsin > UW Madison > CSC Med Flight Helicopter

Comments

Asset Transfer Comments

Current

Transfer / Issue Date 07/01/2025

Issued To Heather Floorke

Location CSC Med Flight Helicopter Pad-1420

Worktags Cost Center: CC002639 UWMSN | SMPH | Ped Expenditure Treatment: Capital Equipment Function: FN0400 Research Fund: FD0150 Federal Aid - Federal Indirect Co Program: PG000006018 UWMSN | SMPH | Pec

Other items needing addressed- Requisitions

Requisitions-When creating requisitions the spend category needs to be the same of all items if they are all part of 1 piece of equipment.

Split out the equipment in a requisition to individual lines as we need this information to create the assets. In other words, if you are purchasing 3 different items that all need tags, they need to be on at least 3 separate lines. You cannot lump them all into one line item and code them to equipment.

Use the “Freight Amount” or “Other Charges” when purchasing multiple items, especially if some are capital equipment and some are not. The system then gives each line a percentage of the freight or other capitalizable costs.

If you are submitting a requisition for an upgrade to a piece of equipment (not repair) you need to add the tag# to the purchase requisition, otherwise we will not know which piece of equipment to attach this cost to.

Goods

items

	Order	Image	Item Description	*Spend Category	*Quantity	Unit Cost
			MFLI 500 kHz Lock-in Amplifier	SC00128 Equipment - Laboratory & Classroom	Quantity * 1	Unit Cost 7,170.00
					Unit of Measure * Each	No Charge
			Shipping cost (M box). Tariffs paid by Zurich	SC00128 Equipment - Laboratory & Classroom	Quantity * 1	Unit Cost 1,017.00
					Unit of Measure * Each	No Charge

Additional Worktags

Expenditure

Treatment: Capital Equipment

Location: UW Universities of Wisconsin > UW Madison > Chemistry Bldg, F Daniels & J H Mathews-0047

Expenditure

Treatment: Capital Equipment

Location: UW Universities of Wisconsin > UW Madison > Chemistry Bldg, F Daniels & J H Mathews-0047

Requisition Information

Request Date

08 / 04 / 2026

Currency

USD

Requisition Type

4 NON-CATALOG - Sole/Single Source

Submitted by

Emily Otto

Consolidate Requisitions on Purchase Orders

Exclude Ship-To Address when Consolidating Requisition Lines

Freight Amount

0.00

Other Charges

0.00

Other items needing addressed- Requisitions

Replacement parts are not capitalizable, they should have an expense spend category assigned to them and should not have the additional worktag.

All Capital Equipment line items and ONLY capital equipment line items need to have the Additional Worktag of Expenditure Treatment: Capital Equipment.

If you are ordering additional components for a piece of equipment and they are under \$5K, they still need to be coded to the same spend category as the larger component and have the Additional Worktag added. This is only if the parts, make up one unit. The \$5K threshold is a combined total for equipment. i.e. 3 lenses of a microscope are \$2,500 each and the main microscope is \$6,000. All 4 items should be coded to the same spend category and have the additional worktag of capital equipment added to them.

Additional Worktags	S
✕ Expenditure Treatment: Capital Equipment ✕ Location: UW Universities of Wisconsin > UW Madison > Chemistry Bldg, F Daniels & J H Mathews-0047	
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Other items needing addressed-Disposals

Disposals-If an asset has a NBV>10% of cost, we need an explanation in the comments section as to why this equipment is being disposed of. If the asset is 144 funded, and has a Conditional Title sponsor (DOC, DOE, NOAA, etc.) OR is an F Tag or Federally Titled, we need a Fair Market Value (the value that the equipment is worth on that day) added in the comments section of the request.

<u>Capital Equipment #3 Tag Number:</u>	
Description:	
Serial Number:	
Grant Funded?	
Is this equipment considered hazardous?	
What is the last location of this equipment?	
Use attachment for requests >3 items and to provide additional documentation applicable to this request.	
Here you may provide any additional information regarding this request.	
Note: If your request includes grant funded capital equipment indicated as lost, please provide any additional information you have surrounding the matter.	

enter your comment





Property Control Questions

Thank you!

▶ Next Q &A: October 8, 2026

▶ Topic: Fabrications