Asset Change Request (ACR) to Surplus: ICP Workflow Process

Job Aid
Processing an ACR to Surplus

Select the **Asset Mgmt & Cap. Expenditures (AM) Module** to access the “Asset UT Customizations” tile.
Processing an ACR to Surplus (cont’d)

Click on “Add a New Value” tab.
Processing an ACR to Surplus (cont’d)

1. Enter the following:
   • Business unit code: **UTSA1**
   • Tag number of the asset to be transferred to Surplus

2. Click “Add”

Note: The “Transaction ID” and “Asset Identification” populate with default values.
Processing an ACR to Surplus (cont’d)

3. Review the **Asset Details**:
   - Current asset details will display
   - Verify you are transferring the correct asset to Surplus

Only ICPs who have access to the **PeopleSoft AM Module** can submit asset change requests. The ICP is listed as the “requester.”
4. In the Activity Type section, select “Asset Transfer to Surplus.”
5. Enter the asset transfer information:
   - **Sanitization Date**: Select today’s date
   - **Sanitation Method**: Select an option from the drop-down menu
   - **Date of Surplus**: Select today’s date
   - **Asset Condition**: Select an option from the drop-down menu
   - **Hazardous Asset**: Select if applicable
   - **New Location**: Auto-populates with CASURPLUS
   - **Surplus Department ID**: Auto-populates with **BFA016**
6. Verify all content
Processing an ACR to Surplus (cont’d)

7. Add comments:
   • Add contact person’s name and phone number
   • Surplus will schedule a pickup

8. Click “Save” or “Submit”
   • Save: Holds the transfer in an initial (incomplete) status
   • Submit: Routes the transfer request to the first approver
Processing an ACR to Surplus (cont’d)

A transaction ID number will populate.

The request will be in a “Pending” status as it routes for multiple approvals. Notify your department manager that an asset transfer is pending his/her approval.