**SOP NO:** SOP-PURCH-35  
**SUBJECT:** Equipment Transfers to Other Research Universities  
**SOURCE:** University Procurement Services  
**ORIGINAL DATE OF ISSUE:** 06/22/2022  
**DATE OF LAST REVISION:** N/A  

**DISCLAIMER:** The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.  

**RATIONALE:** Transferring computers and other equipment  

**PROCEDURES:**  

**Non-Capital Equipment**  
It is not unusual for researchers to take S&E items with them when they transfer to another research university and take their grant with them.  

The approvals required are:  
1. Department chair or dean. Documentation of the items to be transferred can be as simple as an email exchange between the researcher and the department listing the items. Documentation needs to be retained for audit purposes and technology needs to follow the UITS protocol for wiping hard drives and returning them to their original operating systems. See link: [https://datamanagement.iu.edu/data-guide/disposal.php](https://datamanagement.iu.edu/data-guide/disposal.php).  
2. Executive Director of Purchasing. Once step 1 is completed, please request this via the [Support Form](https://training.iu.edu/documentation/capital-assets.shtml).  

**Capital Equipment**  
In addition to the process above, Capital items require retirement through Capital Assets. The department will need to follow the retirement procedure listed here: [https://training.iu.edu/documentation/capital-assets.shtml](https://training.iu.edu/documentation/capital-assets.shtml).  

**Examples of Documentation**  
Capital assets that are sold or transferred should be formally documented. The following options are examples of documentation. Samples are linked.  
- [Equipment Transfer doc](https://training.iu.edu/documentation/capital-assets.shtml) satisfies the need for equipment transfer to another institution and CAMS notation.  

The department provides information for areas highlighted. (Lists can be attached if necessary.)
Always make sure that the institution the researcher is transferring to is the recipient on record and not the individual researcher

- **Bill of Sale**
  - The department provides information for areas highlighted
  - The doc officially transfers ownership of equipment
  - An unsigned document can be used as an invoice for the buyer....other universities particularly appreciate this aspect.
  - Once payment is received, the document should be signed.
  - On a sale it is best to not let the equipment leave IU until payment is received, but sometimes due to short notice, exceptions are made.
  - This form could be modified to cover a donation to a non-profit.

| DEFINITIONS: |
| CROSS REFERENCE: | FIN-GCA70 Equipment Transfers |