The University of Tennessee

2026 Annual Verification - Departmental Movable Equipment Inventory

General: Before beginning the movable equipment inventory verification process, please read all the instructions. Additional information is available on the Controller's Office website at http://controller.tennessee.edu.

Enclosed are the inventory reports and instructions necessary to complete the movable equipment inventory verification process.

■ Each item must be physically observed and verified.

■ Assets retired via the Surplus process should use the Equipment Surplus Electronic Form**:**

For Knoxville use this link to access the form https://forms.utk.edu/warehousing-surplus/ (Knoxville Area only.)

Memphis has its own Surplus Form - S1.

■ An appropriate departmental representative must sign the Signature page included in the packet. Electronic signatures are acceptable.

■ Unsigned Inventory Reports may be sent back to the Dept.

Note: All equipment that meets the definition of movable equipment or sensitive minor equipment must be included in the University's equipment inventory system regardless of how the equipment was acquired, as long as UT has ownership of the equipment. If, during the annual inventory verification process equipment is found, please complete a TDX ticket request using this link: **Fixed Asset Requisition Request**

*****Mark all changes in RED on the excel file so that we can get the asset updated*****

The completed and signed Inventory Report should be returned to:

kfulle19@uthsc.edu

• The email *Subject Line* should be 2026 Inventory and the DASH Department Number.

• Be sure each *Attachment* is titled with the individual DASH Department number.

Please return to my office no later than 09/1/2026.

All inventory reports that fail to meet the requirements of Fiscal Policies FI605/FI600 will be returned for additional information.

Items on the Inventory Report physically located and verified:

For each item located, place a check mark to the left of the item.

Special attention should be given to the following data fields:

1. **Asset Description**: review each description of the item. Update any information on the inventory report.

2. **Serial Number**: should be physically verified or, **if field is empty, then add it.**

If the item has no serial number, "N/A" should be written in the field.

3. **Inventory (blue tag) numbers**: should be affixed where possible and verified

during the inventory process. If the item physically cannot be tagged, "Untaggable"

should be entered into the field. **If there is a tag and this field is empty, then add the tag number into the field.**

• When physically observing and verifying equipment, if tags are found to be

missing or damaged, a ***Duplicate Tag*** must be requested. The supply of

Inventory Tags provided for new equipment purchases should not be used to

replace lost or damaged tags. If you need additional blue inventory tags, please reach out

to **equipinventory@utk.edu**.

4. **Building and Room number**: should reflect the current location of the item. If the location information is missing, please add it to the inventory report.

5. **Responsible Person:** This is the person that the item is assigned to.

6. Please use the **Asset Comment box** for any additional information or comments.

Items on the Inventory Report not physically located:

Determine if the item was transferred to another Responsible Cost Center or otherwise

disposed of during the previous year.

1. Submit a TDX ticket requesting retirement or transfer of equipment. **Fixed Asset Requisition Request**

2. If the items on your inventory report have been sent to Surplus, please contact your local department responsible for handling surplus property for documentation and then submit a TDX ticket to us attaching the documentation.

• Knoxville Departments should use the Equipment Surplus Electronic Form**:**

https://forms.utk.edu/warehousing-surplus/

• Memphis has its own Surplus Form - S1.

Items physically in your department but NOT on the Inventory Report:

Staff should actively look for ALL equipment located in the Department even if not listed on the Inventory Report so that such items may be researched and added to the report if appropriate. If the item is not on the Report but meets the university's capitalization threshold or is considered sensitive minor equipment it should be added to the Inventory. Some examples are but not limited to:

• Equipment donated to the university

• Equipment transferred with a Principal Investigator.

• Equipment purchased at the **UNIVERSITY BOOK STORE-** In these cases, affix an Inventory (blue) Tag to the item and report it on the inventory report.

*****Please make all additions in RED on the excel file so that we can get it added.*****

The results of the 2026 Equipment Inventory and related documentation are to be signed and returned no later than 09/1/2026 to the:

Procurement: kfulle19@uthsc.edu

Delinquent accounts will be referred to Internal Audit for potential further review. Questions may be directed to: 901-448-4882.

Annual Equipment Inventory Checklist – 2026

***** For Departmental use only – Do not return *****

Please complete the following checklist before returning inventory by 09/1/2026.

If any of the following items have not been completed, your inventory will be returned to you requesting the appropriate forms, additions, or corrections. If you need help in providing the necessary information or documentation, please contact **Michele Weldon 865-974-3007** or your campus equipment inventory contact person, **Keysha Fuller 901-448-4882.**

1. Are all **building numbers** and **room numbers** (if applicable) correct? **(No blanks)**

2. Make every effort to be sure all **Serial Numbers** are **correct. (No blanks)**

3. Are all **Inventory Tag Numbers** correct? **(No blanks)**
   • Tag equipment that has not been previously tagged please tag it and update it on the Inventory report.
   • Equipment that is Untaggable mark "UNTAGBL" and update it on the Inventory report.
   • **If a tag number has fallen off a piece of equipment, email equipinventory@utk.edu (*Note* - *Do NOT use a new Inventory Tag #)***
4. All **SURPLUS** submissions should be entered:
   • Knoxville Departments should use the Equipment Surplus Electronic Form**:** https://forms.utk.edu/warehousing-surplus/
   • Memphis has its own Surplus Form - S1.
   ALL OTHER Equipment Inventory Change/ Deletion Requests should be submitted using our TDX Ticket. (Add instructions)
5. **Are all changes in RED**

For equipment that is **not** on the Report, or has been acquired as a **Gift or Transferred from another University** please email the Controller's Office using equipinventory@utk.edu.

Annual Equipment Inventory Checklist – 2026

***** For Departmental use only – Do not return *****

Please complete the following checklist before returning inventory – **DUE 09/1/2026**. **If any of the following items have not been completed, your inventory will be returned to you requesting the appropriate forms, additions, or corrections.** If you need help in providing the necessary information or documentation, please contact **Michele Weldon 865-974-3007** or your campus equipment inventory contact person.

☐ Is the following information on the signature page complete?
Dept. Head or Responsible Party Signature, Date, Verified By, Telephone Number

☐ If the Employee Name listed on the Inventory Report has changed, please send us an email To equipinventory@utk.edu.

☐ Are all **building numbers** and **room numbers** (if applicable) correct? **(No blanks)**

☐ Make every effort to be sure all **Serial Numbers** are **correct. (No blanks)**

☐ Are all **Inventory Tag Numbers** correct? **(No blanks)**

- Tag equipment that has not been previously tagged.
- Equipment that is Untaggable mark "UNTAGBL" and update on the Inventory page.
- **If a tag number has fallen off a piece of equipment, email equipinventory@utk.edu (*Note* - *Do NOT use a new Inventory Tag #)***

☐ All **SURPLUS** submissions should be entered:

- Knoxville Departments should use the Equipment Surplus Electronic Form**:** https://forms.utk.edu/warehousing-surplus/
- Memphis has its own Surplus Form - S1.

☐ ALL OTHER Equipment Inventory Change/ Deletion Requests should be submitted using TDX Ticket **Fixed Asset Requisition Request**

- Disappearance – attach explanation for disappearance
- Dismantlement
- Theft – attach police report
- Transfer
- Trade-In – attach a copy of the Purchase Order, Invoice indicating trade-in value, or other documentation to confirm trade-in.

☐ For equipment that is **not** on the Report, or has been acquired as a **Gift or Transferred from another University** please email the Controller's Office using equipinventory@utk.edu.

☐ **Are all changes in RED?**

Please sign this form to show verification and completion of the 2026 Inventory. Please return this sheet to equipinventory@utk.edu at the time that your inventory is returned to the Controller's Office.

DASH Dept. Number(S): _____

Dept. Head or Responsible Pary Signature: _____

Date:_____

Verified By:_____

Telephone Number:_____

Email Address: _____