

SMART InterUnit Transfer Form Instructions

Noncapital Asset Review		
Transferring Agency	Receiving Agency	Action
Tracks noncap in SMART	Tracks noncap in SMART	Central performs IUT per AM001
Tracks noncap in SMART	Does not track noncap in SMART	Transferring agency retires noncap asset
Does not track noncap in SMART	Tracks noncap in SMART	Receiving agency manually adds noncap asset
Does not track noncap in SMART	Does not track noncap in SMART	No action

Transferring Agency (Business Unit) --See "Noncapital Asset Review" section above before proceeding.

First complete the **Transferring Agency** block by filling in the appropriate values for your Business Unit and the receiving agency Business Unit. Next for the assets that your agency is transferring, list the SMART system asset IDs and descriptions in the **Completed by Transferring Agency** block. Additional rows can be inserted if necessary. Type your name and phone number as well as the date in the Authorizations box, then send the form electronically to a representative of the Receiving Agency.

Receiving Agency (Business Unit)

If your agency approves of the transfer, provide values in the **Completed by Receiving Agency** block. Indicate a different Profile ID and/or agency specific book if applicable. Provide a new Location Code and Area ID (optional). Specify your agency's funding line(s) to which the asset(s) should be transferred. The receiving business unit should use the funding that would have been used had the item(s) been purchased by this agency originally.

Type your name and phone number as well as the date in the Authorizations box and log a Help Desk ticket for Central to perform the InterUnit Transfer. Remember to attach the completed form to the ticket. Use the following:
 Category: Asset Management
 Sub-Category: Maintaining (Adjustments, Re-categorization, Transfers)
 Subject: InterUnit Transfer from BU <insert Transferring Agency> to BU <insert Receiving Agency>

Once you receive an email that the Help Desk ticket has been closed, the Transferring Agency should physically transfer the asset.

Accounts and Reports

Complete a separate InterUnit Transfer in SMART for each asset listed. If the Receiving Agency indicated a Profile ID, select that value in the Profile ID field. Transfer From/To Books values will default based on InterUnit Transfer configuration. Click the Transfer From/To Books hyperlink to review these defaults and verify that the Receiving Business Unit's books have been selected. If the agency has indicated an agency specific book, confirm that Book is listed under the To Books column.

Select the Change Location hyperlink and enter the Location Code/Area ID specified by the Receiving Agency.

Valid chartfield values for the Receiving Business Unit must be selected. The receiving agency's desired values only need to be entered on the first book listed in the Edit Cost Information group box in the Book Section.

After the InterUnit Transfer is saved, the system will populate the New Asset ID field for the Receiving Business Unit. Record the new Asset ID the system assigns to the receiving Business Unit in the **Completed By Central** block of the form. Record this value before proceeding to the next InterUnit Transfer.

Type your name and phone number as well as the date in the Authorizations box. Retain a soft copy of the transfer form. Detach the original attachment from the Help Desk ticket and attach the new copy with all fields populated. Close the ticket to inform the Receiving Agency that the request is complete.

Note: When entering the receiving agency's chartfields use the chart below for split-funded assets.

Original Purchase	For Receiving Agency	Action
Split-Funded	One Line	Enter the same set of Chartfields in all lines of the displayed Book.
One Funding Line	One Line	Enter the Chartfields on the displayed Book.

*If the Receiving Agency wants to split-fund the asset, the agency must complete an IntraUnit Transfer afterwards.

SMART InterUnit Transfer Form

State of Kansas
 Department of Administration
 Division of Accounts and Reports
 Form AM001 (01312011)

Completed by Transferring Agency:	
Transferring Business Unit: _____	Receiving Business Unit: _____

Completed by Transferring Agency *:	Completed by Receiving Agency:	Completed by Central:
* See "Noncapital Asset Review" section on Instructions sheet before requesting an InterUnit Transfer for noncapital assets.	Profile ID: If the Receiving Agency is DISC or DFM, a DISC- or DFM-related profile must be selected. Agency Book: If the asset should be saved to an agency specific book, provide the book name. Chartfield Values: The receiving agency should use the funding that would have been used had the item been purchased by this agency originally. Valid non-budgetary values must be entered.	

Transferring Agency Asset ID	Asset Description	Profile ID	Agency Book (Specify)	Location Code	Area ID	Department	Fund	Bud Unit	Program	Project	Svc Loc	Agy Use	Chartfield 2	New Asset ID

Authorizations:		
Transferring Agency Representative	Phone Number _____	Date Approved _____
Receiving Agency Representative	Phone Number _____	Date Approved _____
Central Processor Completing Transfer	Phone Number _____	Date Transfer Completed _____

***** FORM MUST BE SUBMITTED ELECTRONICALLY BY THE RECEIVING AGENCY VIA THE SMART HELP DESK*****
<https://dahelpdesk.ks.gov/>