

# Real Estate Services

## 2020 Operations Policies and Procedures

Updated: October 11, 2020

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# Administrative Duties

# Administrative Duties

## Miscellaneous

- Answer all phone calls. Screen & forward call or take detailed message for intended recipient
- Greet office visitors and direct to desired location or take message
- Receive mail delivery and distribute accordingly
- Water office plants semi-weekly
- Place phone calls and send emails at the request of RES staff

## Tenant Contact List

File Location: [\\sugarloaf\rps\Administrative](#), choose Excel file "ADMIN SPREADSHEETS"

- Update list with every new lease, license agreement, MOU, amendment, and all other miscellaneous notifications

## RBS & RES Annual Budget Books

At the beginning of each fiscal year RES accountant will provide budget information which must be printed & bound. After information received, double-check that it's been reviewed & approved by senior RES staff

- Take budget with previous year's budget book to FedEx office and instruct them to bound new information exactly as it was the previous year. This includes tab placement, cover page, and ensuring pages aren't cut off at the bounding border.
- This procedure may also be modified to bind the books in-house; or sending an electronic version depending on circumstances.

## Real Estate Services Department Email

Login: FMRES

Password: Res#123456

Alias: RealEstateServices@Colorado.edu

Current Owner: Steven Stasica

\*\*To change ownership, call 5HELP or submit a ticket through OIT and request a change in ownership. This should take 1-2 days and OIT can assist you further with the process.

## Printer/Scanner/Copier Information

### Printer/Scanner Operations – Xerox AltaLink C8035 MFP

- Link to User Manual: [http://download.support.xerox.com/pub/docs/ALC80XX/userdocs/any-os/en\\_GB/AltaLink\\_C80xx\\_mfp\\_ug\\_en-us.pdf](http://download.support.xerox.com/pub/docs/ALC80XX/userdocs/any-os/en_GB/AltaLink_C80xx_mfp_ug_en-us.pdf)
- Serial number: 3TX390088 (*also located on Configuration report*) (see attached below)
- Supplies ordered through “Management Services” 1-800-822-2200
- Check & Refill paper a minimum of once a week. If printing volume is unusually high, refill as needed
- Monitor paper inventory and order as needed (Paper is ordered on Marketplace)
- Monitor Supplies usage; keep 1 back up toner of each color and 1 toner waste cartridge available (printer will not work if there is not a supply of toner or a toner waste refill cartridge)
- *See the Supplies Usage page for the reorder numbers.* (below). This can be printed upon request from the machine directly using the prompts on the screen.
- Clear paper jams by following prompts on printer screen
- At request of senior RES staff, print, copy, and scan documents

## Xerox® AltaLink™ C8035 MFP

Multifunction Printer

### Common User Data

Machine Name:	rps-226-10
IP Address:	128.138.226.10
Machine Serial Number:	3TX390088
Fax Line1:	303 4926448
System Software Version:	100.001.057.09600
Machine URL:	http://128.138.226.10

### Machine Profile

Machine Name:	rps-226-10
Machine Serial Number:	3TX390088
Xerox Asset Tag:	
Customer Asset Tag:	
Service Phone Number:	
Customer Support Phone Number:	
Supplies Phone Number:	
System Administrator:	System Administrator name not set
Machine Location:	Real Estate Services - RL2

## Configuration Report

Printed on: Sep 29, 2020 at 11:25 AM

### Physical Connections

#### USB Settings

USB Connection Mode:	Software Tools
Print Timeout:	5 seconds

#### Wired:

Ethernet MAC Address:	Enabled
Ethernet Speed/Duplex Setting:	9c:93:4e:96:90:6a auto

#### Wireless:

SSID:	Disabled
-------	----------

Security Mode:	
----------------	--

Encryption Algorithm:	
-----------------------	--

Status:	
---------	--

#### Wi-Fi Direct®:

Disabled
----------

WPS Name:	
-----------	--

#### NFC:

Disabled
----------

### Protocols

#### TCP/IPv4:

IP Address:	Enabled
Subnet Mask:	128.138.226.10
Router/Gateway:	255.255.255.0
	128.138.226.1

# Supplies Usage

Supplies ordering information is located at [www.xerox.com/office/supplies](http://www.xerox.com/office/supplies)

## Consumables

### 1 Toner Cartridges



#### Black

→ Date Installed: Sep 17, 2020  
 Reorder: 006R01509  
 Estimated Pages Remaining: 26532  
 (Based upon this toner cartridge's average coverage: 3%)



#### Cyan

→ Date Installed: Jul 10, 2019  
 Reorder: 006R01512  
 Estimated Pages Remaining: 5115  
 (Based upon this toner cartridge's average coverage: 2%)



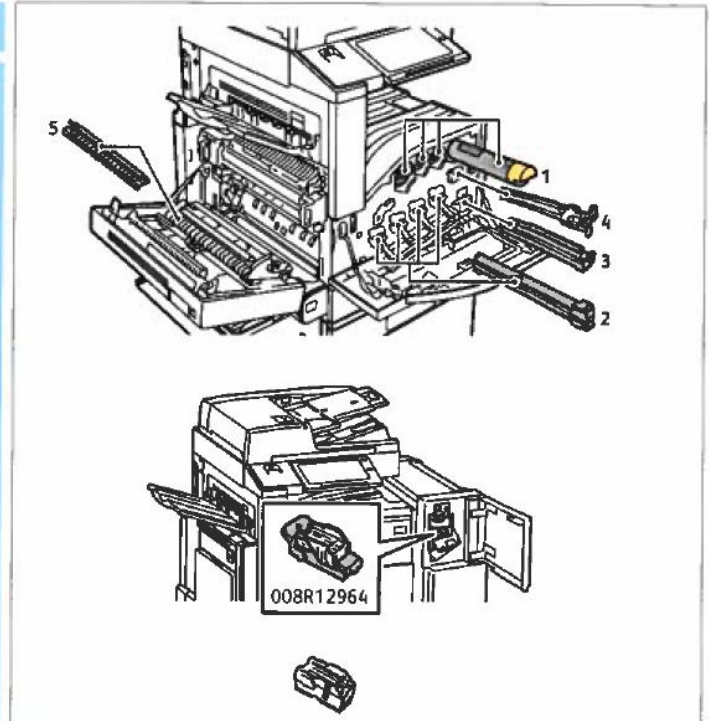
#### Magenta

→ Date Installed: Jul 10, 2019  
 Reorder: 006R01511  
 Estimated Pages Remaining: 7905  
 (Based upon this toner cartridge's average coverage: 1%)



#### Yellow

→ Date Installed: May 29, 2019  
 Reorder: 006R01510  
 Estimated Pages Remaining: 5890  
 (Based upon this toner cartridge's average coverage: 2%)



### Staple Refill



Reorder: 008R12941

OK

# Routine Maintenance Items

## 2 Drum Cartridge



<b>Black (R1)</b>	Date Installed: Oct 20, 2017 Reorder: 013R00662 Estimated Pages Remaining: 48960 (Based on average printer job size: 1 Pages)	Life Remaining 100 % 50 % 0 %
<b>Cyan (R2)</b>	Date Installed: Oct 20, 2017 Reorder: 013R00662 Estimated Pages Remaining: 58480 (Based on average printer job size: 1 Pages)	Life Remaining 100 % 50 % 0 %
<b>Magenta (R3)</b>	Date Installed: Oct 20, 2017 Reorder: 013R00662 Estimated Pages Remaining: 58480 (Based on average printer job size: 1 Pages)	Life Remaining 100 % 50 % 0 %
<b>Yellow (R4)</b>	Date Installed: Oct 20, 2017 Reorder: 013R00662 Estimated Pages Remaining: 59840 (Based on average printer job size: 1 Pages)	Life Remaining 100 % 50 % 0 %

## 3 Waste Container



Date Installed: Feb 4, 2020  
Reorder: G08R13061

OK

## 4 Transfer Belt Cleaner



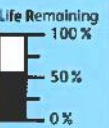
Date Installed: Oct 20, 2017  
Reorder: 001R00613  
Estimated Pages Remaining: 73972



## 5 Second Bias Transfer Roller



Date Installed: Oct 20, 2017  
Reorder: 008R13064  
Estimated Pages Remaining: 113972



# New Hire Procedure



Employee ID #: \_\_\_\_\_

Identikey: \_\_\_\_\_ Password: \_\_\_\_\_

### Included in this packet:

- Map of where Parking Services and the Buff One Card Office are
- Parking Permit Application Link
- Campus Card Application Link
- Holiday Schedule Link -<http://www.colorado.edu/hr/home/cu-boulder-holiday-schedule>
- Payroll Direct Deposit Instructions
- W4
- I9

1. **Set up Identikey** (you will need someone to log you into a computer, once this is activated, you will be able to log onto a computer under your name)

1. Go to [cuidm.colorado.edu](http://cuidm.colorado.edu)
2. Click "Activate your Identikey"
3. Read over page and click checkbox at the bottom of the page
4. Fill out form with employee ID number (6 digits), Birth Date, and last 4 of social
5. Follow instructions for the rest of the process
6. Now you will be able to Log-In to a computer as well as your MyCUInfo Portal

### 2. Parking Pass

1. You are eligible to have your parking pass deducted monthly from your pay (\$59.00/month). In order to get a parking pass, fill out the top half of the "FACULTY/STAFF Parking Permit Application". Link to Application: [http://www.colorado.edu/res/sites/default/files/attached-files/faculty\\_staff\\_parking\\_permit\\_application.pdf](http://www.colorado.edu/res/sites/default/files/attached-files/faculty_staff_parking_permit_application.pdf)
2. Make sure to include your vehicle information
3. Take application over to the Parking office (map attached), they will require you buy a temporary permit until you receive your permanent permit. You can also submit online at: <https://www.colorado.edu/pts/permits/parking-permits/faculty-staff-permits>
4. Once you have your permit, you can use the Business Permit (see Steven) to park near the Center for Community to get your Buff One Card

### 3. Campus Card (Buff One Card)

1. Complete card application and obtain Property Manager's signature approval  
Application Link: [http://www.colorado.edu/res/sites/default/files/attached-files/buff1\\_card\\_application.pdf](http://www.colorado.edu/res/sites/default/files/attached-files/buff1_card_application.pdf)
2. Bring completed form to Buff One Card Office, located in the Center for Community (map attached).
3. Bring your photo ID and employee ID number with you

### 4. Set up e-mail

1. Login to your computer
2. Open Outlook
3. Email Jonathan or Chuck (in room 122) of this building to come help you get your e-mail set up. Tell them you need it to be an Outlook account and NOT a Gmail account.

You can enter a request ticket also at the FM Help desk site: <https://www.colorado.edu/fm/internal>

Scroll down on the right there is an orange "FM IT Help Desk" select that and enter requested information.

## 5. Set up Direct Deposit

1. Access myCUinfo – [mycuinfo.colorado.edu](https://mycuinfo.colorado.edu) and from the “My Info and Pay” tab, choose Direct Deposit
2. You’ll need to verify your identity by choosing the appropriate phone number and following the prompts
3. Enter your bank information, including account & routing numbers

## 6. Fill Out W4 and I9

1. Take both forms and Social Security Card to Jennifer Salyers in room144

## 7. Complete Trainings in MyCUInfo:

1. Go to <https://mycuinfo.colorado.edu>
2. Click on the Training tab
3. Click “Start Skillsoft”
4. You can then search for all of the following:
  - a. CU: New Employee Orientation –CU-Boulder
  - b. CU: Discrimination and Harassment
  - c. Information Security and Privacy Awareness
  - d. Fiscal Code of Ethics
  - e. Procurement – Purchasing & Contract Management
  - f. CU Marketplace –Shopper
    - i. *Speedtype - RBS Admin: 12018473, and Account code is 480101*

## 8. Sign up for Benefits

1. If you are going to use the CU Health Care Benefits, make sure to enroll in them within 30 days from your start date. Go to [www.cu.edu/employee-services/new-employee-university-staff](http://www.cu.edu/employee-services/new-employee-university-staff) for more information

## 9. Contact Beatriz Antequera for FAMIS /Self-Service Access and Training

1. [Beatriz.antequera@colorado](mailto:Beatriz.antequera@colorado) or 303-492-1201
2. She will need your name and employee ID number

## 10. Contact OIT to become the Telecommunication Liaison

1. 303-735-4357

## 11. Transfer hard key to your name

1. Call 303-492-6609 and give them the key number, your name, and the last 7 digits on your Buff One Card

## 12. Get access to Prolease (Rebecca will need to do this)

1. Login to Prolease
2. The first screen that comes up has a link to “Update/Add Users”
3. Click the dropdown for “Database” and select University of Colorado
4. Click Add New User
5. Make the username easy (your first initial last name is good, ex: rfell)
6. Fill in the rest of the contact information
7. Under the Access Rights section, click “View”

8. For the Security Group, select “Standard All Properties – Edit and Create Logins”
9. Click “Yes” next to all the options in the LeaseAdmin/Proj Tracking section, then click OK
10. The website to login to Prolease is: [www.proleaseweb.com](http://www.proleaseweb.com)

**13. Become the parking Liaison**

1. Send an e-mail to [pts.business@colorado.edu](mailto:pts.business@colorado.edu) and request to be the Parking Liaison for Real Estate Services

**14. Get access to be able to update the A to Z Directory**

1. E-mail [Beatrice.Steiner@colorado.edu](mailto:Beatrice.Steiner@colorado.edu) with your IdentiKey name and request access to be able to update the A to Z Directory

**15. Schedule Driving Class (if under age26)**

1. You may need to borrow a University vehicle to do errands or other duties, so it’s a good idea to have this training done in case it comes up.
2. You need to take the Defensive Driving Course (information located at [www.colorado.edu/pts/fleet-services/driver-safety-training](http://www.colorado.edu/pts/fleet-services/driver-safety-training))
3. If you want to borrow a facilities Prius to run errands or do inspections, call Janet at 2-5522 and reserve a vehicle

**16. Save Speedtypes to a desktop sticky note, you will reference these daily in FAMIS:**

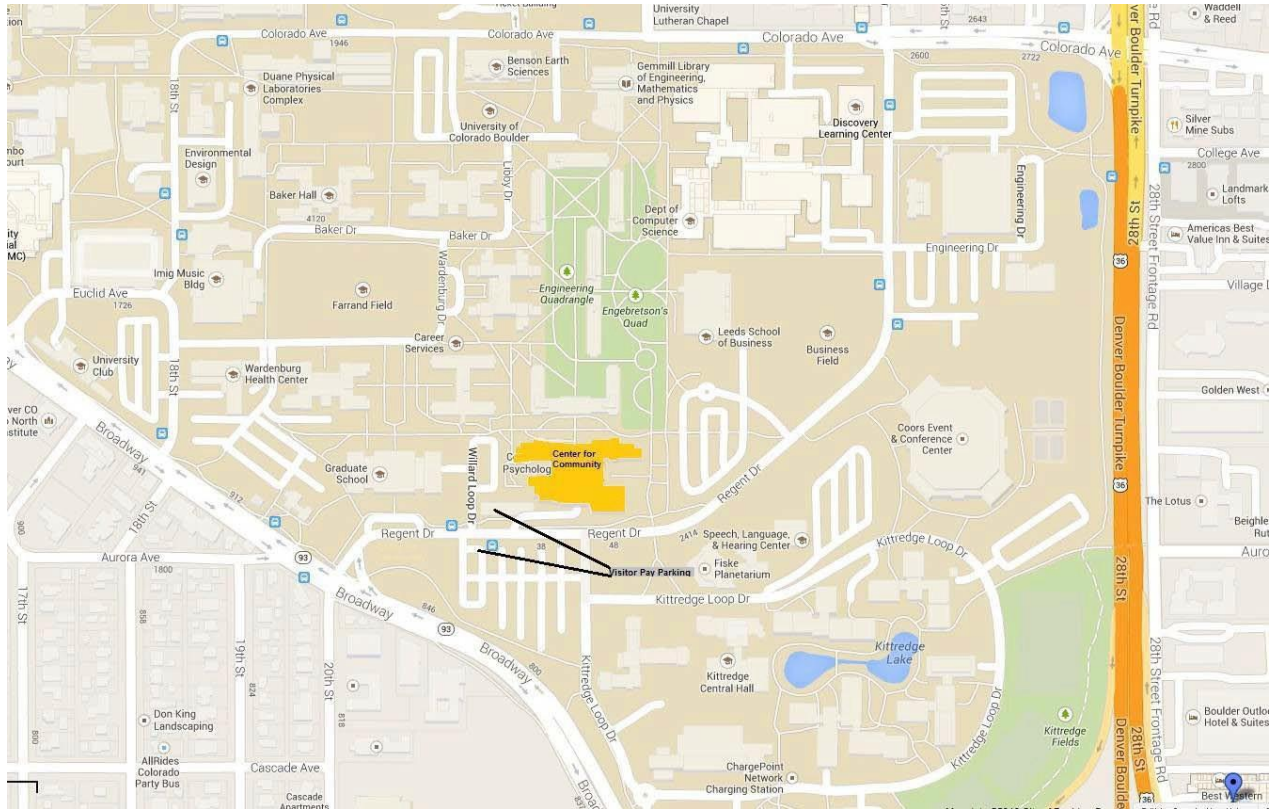
	<u>Speedtype</u>	<u>Building Code</u>	<u>Site</u>
1.	12018473	N/A	RBS Admin Account 700200
2.	12016566	RL2/ARC	RL2 (includes ARC)
3.	12020397	MSSC	RL6 (MSSC)
4.	12000725	JILA	JILA (All Activity) USE THIS
5.	12015184	CIRE	CIRES
6.	12012743	LSTR	LSTR
7.	2026831	GOLD	GBB - Gold Biosciences (MCDB)
8.	12053886	CINC	CINC - Ctr for Innov & Creativity
9.	12000009	SPSC	SPSC - Space Science Bldg
10.	11001352	SEEC	SEEC/MAC12026831
11.	12031823	TB98	1215 GV (3-2)
12.	12024440	TB95	1232 GV (2-1)
13.	12015766	TB65	1301 GV A&S (Shakespeare)
14.	12045689		1302 GV Lot 259 (3-1 / 3-2)
15.	12030591	TB82	1333-35 GV (CIRES)
16.	12015770	TB88	1338 GV A&S (Writing & Rhetoric)
17.	12027185	TB99	1429 GV (2-1)
18.	12017431	TB66	1445 GV (4-1)
19.	12030589	TB78	1510 13th St (2-1)
20.	12030587	TB90	1514 13th St (2-1)
21.	12000283	N/A	1402 Broadway (Starbucks)
22.	12001030	WALN	3300 Walnut
23.	12010645	TB72	South Campus Gateway WHSE
24.	11059488	STBK	South Campus Ops
25.	12012400	TB45	Whse #1
26.	12012401	TB46	Whse #2
27.	12012403	TB47	Whse #3
28.	12012399	TB48	Whse #4
29.	12013285		All Antenna Access
30.	12012373		GV General Grounds Maintenance

# Directions to Campus Card Office

## Getting to the Campus Card Office

There's not a designated street address for the Campus Card Office. The Campus Card Office is located in the Center for Community. I have included a map in helping your techs find their way (if they GPS "Center for Community Boulder, CO" it should come up as well).

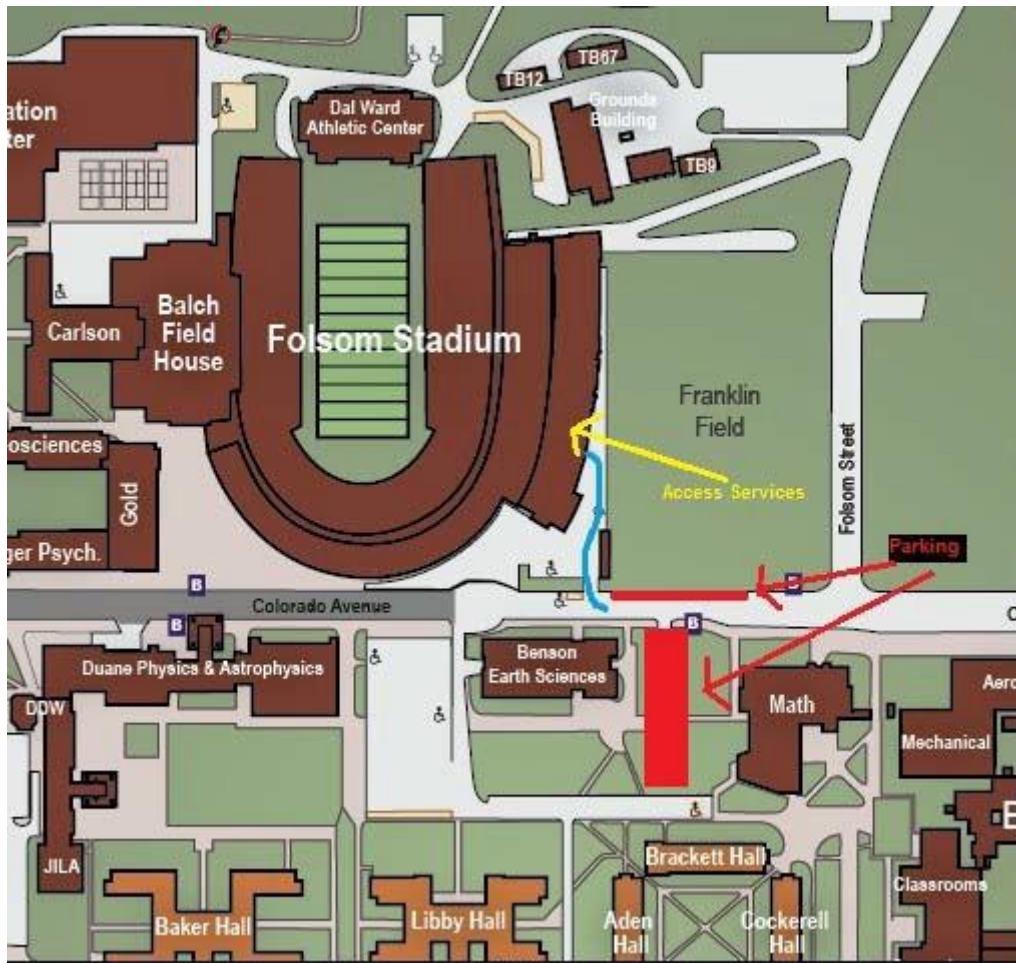
There are two visitor lots on the west end of the building that have metered parking.



# Directions to Access Services

## Getting to Access Services

Access Services is located in the Folsom Stadium building. If you walk around the east side of the building on the lower level and go to Gate 8, Rm.1b11, there are signs to help guide you there. You can also ask anyone around the stadium where it is and they will most likely know.



Blue is the walking path to get there, red is parking options.

# Accessing Outage Calendar



# Accessing Planned Outage Calendar

You will receive outage notifications for all work that is done in RES buildings that may cause a disruption to the tenants of the building. This includes cooling/heating, water access, parking, noise, etc. When you receive this notice, distribute to all tenant contacts of the corresponding building and ensure they are aware of the outage and OK with the timeframe.

Directions to accessing planned outages:

1. Go to: <http://www.colorado.edu/fm/internal>
2. After signing in, choose "SharePoint site" on from Quick Links column
3. Under "Facilities Management" choose "Shared Calendars"
4. From left column choose "Outages"

The screenshot displays the SharePoint 'Outages' calendar for January 2017. The interface includes a navigation bar with 'Office 365' and 'SharePoint' logos, and a search bar. The main content area shows a monthly calendar grid with various outage events listed across different days and times. The events include 'EPRK Building', 'GOLD Controls', 'CINC Chilled Water', and 'ATLS Fire Sprinkler'. The calendar also shows a list of calendars in view on the left side, including 'Outages', 'CBS Calendar', 'FSG Alarms Offline', 'FSG Datable', 'IT Outages', 'Out of Office', 'Payroll', 'Pre-Bid, Bid & Pre-Construction', and 'Training Opportunities'.

SUN	MON	TUE	WED	THUR	FRI	SAT
1	2	3	4	5	6	7
			EPRK Building	4:00 am FSK Domestic Water 7:00 am ECCR Fire Sprinkler		6:00 am - 2:00 pm MUEN Domestic Water
8	9	10	11	12	13	14
	6:00 am - 10:00 am SESC Domestic Water	7:00 am - 12:00 am CARL Air Handling Unit	12:00 am CARL Air Handling Unit	6:00 am EC Electrical		ATLS Fire Sprinkler
15	16	17	18	19	20	21
			+ 1 more item	- 2 more items	- 1 more item	
			EPRK Building COLD Controls			CINC Chilled Water
22	23	24	25	26	27	28
			+ 1 more item	+ 2 more items	+ 1 more item	+ 1 more item
			EPRK Building GOLD Controls CINC Chilled Water			
29	30	31	1	2	3	4
	+ 4 more items	+ 4 more items	+ 3 more items	+ 3 more items	+ 2 more items	
			EPRK Building GOLD Controls CINC Chilled Water			

# Ordering RES Professional Supplies

# Ordering RES Professional Supplies

(Business Cards, Letterhead, and Envelopes via CU Imaging Services)

Web Address: <https://imaging-services.myprintdesk.net/DSF/asp2/storefront.aspx?>

## Business Cards

1. Choose "Business Cards" from left menu
2. Choose style of card. RES standard style is "CU Gold/Black Logo Boulder Campus Business Card"
3. Enter information fields-

Standard RES Business Card Submission:

First Name Last name (Top Left)	<i>Sandra Grover</i>
Title/Line (Below Name)	<i>Real Estate Administrative Assistant II</i>
Second Title/Line (Below Name)	(BLANK)
Third Title/Line (Below Name)	<i>Real Estate Services</i>
Address (Top Right)	<i>1540 30<sup>th</sup> Street, RL#2, Room101</i>
Campus Box 000 (Below Address)	<i>444 UCB</i>
Boulder Colorado 80309	<i>Boulder, CO 80309-0444</i>
Additional Info (Bottom Left)	(BLANK)
Second Additional Info	(BLANK)
Third Additional Info	(BLANK)
tel fax e-mail website 1 (Bottom Right)	<i>t 303-492-6883</i>
tel fax e-mail website 2	<i>f 303-492-6448</i>
tel fax e-mail website 3	<i>e <a href="mailto:Sandra.Grover@colorado.edu">Sandra.Grover@colorado.edu</a></i>
tel fax e-mail website 4	<i>www.colorado.edu/res</i>

4. Choose "Product Preview" and confirm details. Compare preview to other RES staff cards to ensure proper placement
5. Choose "Add to Cart" on bottom left of screen
6. Confirm delivery details and quantity. Click "Save" if changes made
7. Choose "Place Order" and provide Speedtype. RES ST is 12018473
8. Imaging Services will email Order Confirmation. Save for records

## Letterhead & Envelopes

The process for Letterhead & Envelopes is very similar to that of ordering Business Cards but there isn't a standard RES format. Send previews to other RES staff decide on favorite design.

### Letterhead Personalization Fields

Department	Real Estate Services
Address	1540 30 <sup>th</sup> Street, RL#2, Room101
Campus Box	444 UCB
City	Boulder
Zip Code	80309-0444
Telephone	303-492-6883
Fax	303-492-6884
e-mail	(BLANK)
website	<a href="http://www.colorado.edu/res">www.colorado.edu/res</a>

### Envelope Personalization Fields

Department	Real Estate Services
Address	1540 30 <sup>th</sup> Street, RL#2, Room101
Campus Box	444 UCB

# Creating Occupancy & Vacancy Maps

## Creating Occupancy & Vacancy Maps

1. Go to CAD Office Website: <http://fm.colorado.edu/internal/cad/index.html>
2. From the top left of screen, choose building by Code, Name, or Number
3. Select appropriate floor. This opens up CAD drawing
4. Open "Snipping Tool" application from your desktop Windows Start Menu
5. Click "New" and then use the tool to grab the screen shot of the map
6. Right click on the screen shot and select "Copy"
7. Open Paint and paste the screen shot into Paint
8. From here, use the paint bucket to color rooms, and customize the entire map to be what you need
9. Use the font tool to create legends & add the building name. Do not delete the map compass
10. Once completed, save as a JPEG file
11. To convert to PDF, right click on the file in the folder and select the "Convert to PDF" option

# Cash Receipts

# Cash Receipts

Server File Location: \\Sugarloaf\rps\Administrative\2020 Cash Receipts

Locate check's corresponding receipt and create if necessary. Open file...

1. Confirm Organizational Unit Contact Information:

Organizational Unit Contact Information	
Organizational Unit:	Real Estate Services
Campus Mailbox:	444
Contact Person:	Heather Ulmer/Steven Stasica
Campus Phone:	303-492-6883

2. Enter/Update Deposit Information:

SpeedType	Account	Description	Reference	Amount	D/C
12016566	284754	12/16 Rent – SSI	019119	\$885.50	

Speedtype – Provided by accountant

Account – Provided by accountant

Description – Brief description must be less than 30 characters

Reference – Check Number. For cash, enter “CASH”

Amount – Check/cash amount to be deposited with receipt

**\*Repeat process for each check & cash payment**

3. Enter/Update Remarks:

Remarks
12/16 Rent - Research Lab #2 - Space Science Institute First National Bank, Boulder, CO

Remarks – There is no limit to the number of characters. Provide a detailed explanation including important information not listed in Deposit Information. Always provide payment period, purpose of payment, property information, tenant information, and bank information.

4. Totals:

Totals	
Currency	
Checks	\$885.50
Credit Cards	
Wire	
Other	
Tender Total *	\$885.50
	<b>CR Form Total *</b> <b>\$885.50</b>
	<i>* These totals must agree.</i>

Add total monies to be deposited in the left column. The right column automatically populates from Deposit Information entered above. As expressly stated, these totals must agree.



5. Stamp Check:

Each check must be endorsed/stamped with the following:

For Deposit Only  
Regents of the University of Colorado  
Organizational Unit Name  
Campus Bank Account Number (available from appropriate campus bursar's office)  
SpeedType/Account #s (use smaller font for this line of information so the bank does not mistake it for part of the Bank Account #)

Each check must be stamped with RES provided stamp in signature area. Stamp will contain above information and you must list each Speedtype and Account # that was entered in Deposit Information (#2 above).

Campus Bank Account Number: NWB 1823472752

Organizational Unit Name: Real Estate Services

For reordering purposes, Stamp can be found on CU Marketplace, Staples site: model **2000 Plus Printer 50**

6. Print 2 copies of receipt.

One is sent with payment to Bursar's office and the other is filed in RES' rent collection records

7. Approving Authority Certification &Signature:

<b>Approving Authority Certification &amp; Signature</b>	
I certify that the information above is correct. If being deposited to a sponsored projects account (Fund 30/31 SpeedType) or gift account (Fund 34/35/36 SpeedType), I also certify that all deposits are appropriate for the SpeedType(s). I acknowledge that all required backup documentation is being maintained in organizational unit files, available for audit if necessary.	
<hr style="width: 50%; margin: 0 auto;"/> Organizational Unit Authorizing Signature	 Date

Real Estate Services' authorized signature must be approved by RES Accountant. If unable to obtain, Facilities Management accounting group must approve.

8. Deposit

After delivering to accountant, accountant locks approved receipts in secure blue bag. Checks must be taken to Bursar's office 2x per week. Cash must be taken the same day received.

Bursar's Office – Office of Cash Management website:

<https://bursar.colorado.edu/resources/campus-resources/office-of-cash-management/>

**Update:** Due to Covid-19 procedures have changed; Cash receipts are compiled as described above, and then each is saved as a PDF, with a scan of each check attached to the scans; The scans are then sent to the Senior Financial Analyst for review and signatures in DocuSign. Afterwards, the scans are printed (2 copies) and one is kept with the check stub if any, initialed and dated by the person who is dropping the checks at the Drop box outside of regent. The second signed copy is matched with each check and all that are being deposited are compiled in an envelope and sealed. The drop box is outside the Regent Administrative Center. They are also open for in-person deposits on Wednesdays. A complete electronic package is also saved in server in a file with date.

See the following website for any updates related to hours, and procedure updates: <https://www.colorado.edu/bursar/>

# Reconciliation of Expense reports and Purchase Card or travel card

Expenses need to be processed for reimbursement within 30 days;

For Procurement Card and Travel Card Reimbursement Reports, receipts need to be processed in the report via the Concur payment system within 30 days. If a report is not processed within that time, a reminder warning notice will be sent to your email. If successive reports are late, privileges could be revoked.

Begin by accessing Concur via your campus portal.

1. Log in to your campus portal and locate your CU Resources section.
2. Under the Business Applications area, select the Concur Travel & Expense System link.

Step 1 Create the Expense Report

Step 2 Add Expenses

Step 3 Allocate Expenses

Step 4 Attach Documents

Step 5 Set Approval Flow

Step 6 Submit the Expense Report

Travel card reimbursements follow the same steps, but require more information such as mileage, meals and per diem. For more information on Expense Reports choose from the links below:

Concur – The Expense Report Process

<https://www.cu.edu/psc/expense-report-process>

Reconciling Procurement Card with Concur

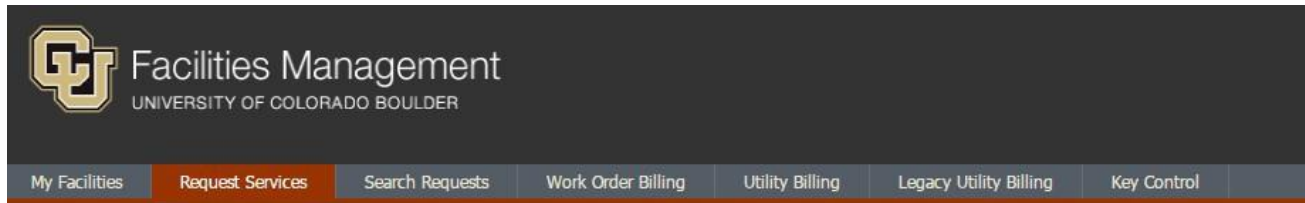
<https://www.cu.edu/psc/training/reconciling-procurement-card-concur>

# Antenna Site Access

# Antenna Site Access

You will frequently be contacted by cell providers' technicians for site maintenance. We don't allow access to any of these sites without an escort provided by Access Services.

1. After receiving inquiry to access site, take tech's information (names, phone, site, cell provider) and contact Access Services for their availability (303-492-6609)
2. Contact technician and provide time specified by Access Services
3. Housing & Dining (HDS) buildings ONLY – Coordinate access between Access Services and Jon Keiser
4. Submit Service Request in FAMIS, using ST 12013285, and requesting escort from Access Services:



## Non-emergency Service Request

Requests will be processed the next business day.

**Please call all emergencies into the Operations Control Center at 303-492-5522. Do not use this form to submit emergencies.** Please report incidents of offensive graffiti in or around buildings to the Service Center at 303-492-5522, immediately. For Housing Maintenance Issues, please contact the [Department of Housing](#) at 303-735-5555.

**Required** fields denoted by an asterisk.

Requestor Name	GORDON, BRIAN A	Requester Email	Brian.Gordon@Colorado.EDU
Requester Phone	303 492 6883	Fax	
Search for Alternate Requester	<input type="text"/> To add an Alternate Requestor to your request, you must enter at least part of the name of the person you wish to add and then click the magnifying glass to search the UCB directory.		
Alternate Requestor	<input type="text"/>		
<b>Building*</b>	STAD <input type="text"/>	For outside spaces, use CAMPUS as the building name.	
Floor	<input type="text"/>	Room	<input type="text"/>
Building Description	<input type="text"/>		
Speed Type	12013285	Please see our <a href="#">Who Pays for What Manual</a> to find out if a Speed Type is required. Leave blank if you are not sure.	
<b>Subject/Problem*</b>	STAD ESCORT TO at&t SITE ATTN: ACCESS SERVICES		
<b>Description of Work*</b>	PLEASE PROVIDE ESCORT TO AT&T SITE ON STADIUM ROOF. TECH SCHEDULED TO ARRIVE AT 2PM. NAME: JOHN SMITH PHONE: 555-1234 CELL PROVIDER: AT&T		
Dates Work Cannot Be Done In Location	<input type="text"/>		

**Submit**

# Grandview Management & Leasing

## **General Grandview**

- Interior inspections should happen once a year – preferably in November or December. These inspections are to look for mold, safety issues, broken fixtures, signs of pets, and tenant damage.
- Exterior inspections should happen monthly.
- No facilities or contractor work should be scheduled before 10:00am without ample notification via phone and/or email to the tenants, depending on severity of issue.

## **Grandview Leasing**

1. Mid December—Send 1st notification email out to student tenants requesting their decision on renewing. They must plan to be full time students the following year in order to renew and must provide their student ID number to be verified with the Office of the Registrar.
2. Late December—Send 2<sup>nd</sup> notification email out, reminding that the deadline to notify us on their decision to renew is two weeks away. After that date, we will put their house up for rental. Rental price increases are determined by the Higher Education Price Index (HEPI) for all properties.
3. December 31—Send final notification that tenants must give us notification by 5:00pm on January 1 of their decision.
4. After Holiday Break—Compile information on which properties are available for new tenants, update website, distribute applications to any students who are already on the waitlist for the properties.
5. January 1-31—Setup appointments to show houses, compile applications, call on references, check student status with the Office of the Registrar for every tenant.
6. Once tenants are selected, set up lease signing date. Make sure students bring their deposit and photo IDs.
7. Draft lease agreements using templates.
8. Print enough copies for each tenant to have one, plus an additional for the office files. Make sure the following are attached:
  - a. Asbestos and Lead Based Paint Disclosure
  - b. Lead paint information packet
  - c. Addendum to Lease Agreement

## **Move-Out**

1. Contact tenants at least a month prior to their move-out date offering them a pre-move-out walkthrough to go over what needs to be done before they move out. This is completely optional but suggested. Also remind tenants when their move-out date/time is according to their lease and provide them a suggested cleaning list (also available on the website).
2. In the meantime, contact cleaning company of choice with a list of addresses that need to have their homes cleaned upon vacating. Remind them that the turnaround is 24 hours and we need separate detailed bills for each home.

## **Move-In**

1. Contact new tenants about a month prior to their move in and remind them of when they can pick up their keys/move-in packets. Make sure they know first month's rent is still due on the 1<sup>st</sup> with a late fee applied after the 10<sup>th</sup>.
2. Make move-in packets and include:
  - a. Move-in damage form
  - b. Welcome Letter Packet (customize for each property)
  - c. Western Disposal pick up schedule
  - d. Xcel transfer instructions
  - e. Emergency Contact Request Form
  - f. Executed leases if they don't have them yet
3. Have tenants sign for keys
4. Collect first month's rent and go over welcome packet
5. Confirm Xcel transfer

## **Deposits**

1. Compile charges/receipts for cleaning/repairs for each property
2. Fill out deposit letter
3. Give to Financial Analyst to process in a payment authorization form
4. Once checks come in, include copies of the receipts, the letter, and checks and mail to each tenant

## **Termination Policy**

- There are various circumstances where a Grandview lease requires termination
  1. Residents agree to remove an individual and cover lease payment without new roommate – in this instance RES will amend the lease to remove exiting resident. This follows standard approval procedure
  2. Residents' request to terminate lease – this can be approved within department. Director must sign lease termination letter and send to tenants. Additional approvals not necessary
  3. Residents must be forcefully evicted – Contact legal department for process. Do not proceed with any action without consent & direction of CU legal counsel

## **Login Credentials for posting a rental for Grandview on CU Ralphie's List**

<https://ralphieslist.colorado.edu/>

Username: curealestateservices

Password: ralphie1

*Sample Deposit Letter*

SENT VIA U.S. MAIL

**DATE**

Dear \_\_\_\_\_:

Enclosed is the security/damage deposit for the house you leased from the University of Colorado at **ADDRESS** for the period of **LEASE TERM DATES**.

Your total refund is \$ \_\_\_\_\_. Following is a breakdown of charges and credits:

Security/Damage Deposit	\$ 2,000.00
Less: Carpet Cleaning (see attached invoice)	\$( 72.28)
Plus: Overpayment of rent	<u>\$ 7.00</u>
<b>Remaining Balance</b>	<b><u>\$ 1,934.72</u></b>

As requested, we have split the deposit evenly between you into separate checks. If you have questions, please call me at (303) 492-6883.

Good luck to you in the future.

Sincerely,

\_\_\_\_\_, Accountant

Real Estate Services

444 UCB

University of Colorado

Boulder, CO 80309-0444

Encl: Deposit checks, invoice



# Lease/MOU/License/Amendment Procedure

**Lease Agreement/MOU/License Agreement/Amendment Process (Wet Signatures)**

1. Executed Space Request Form received and saved to server (internal/external or private use)
2. Notification that a lease or amendment needs to be drafted from Director(s) or Real Estate Officer (REO)
3. Admin drafts contract by using the appropriate template and gives the draft to Property Manager
4. REO reviews and marks corrections in red pen then returns draft to Admin
5. Admin makes changes and gives updated contract, draft, routing sheet and memo to REO
6. REO reviews final copy and returns to Admin for distribution
7. Admin prints enough copies for all signees to get copies, marks with “sign here” tabs, and puts in mailing/interoffice envelope for distribution
8. Admin maintains tracking information via FedEx site
9. Contract returns with tenant signature, Admin distributes to remaining signees
  - a. Lease Agreements must be approved by Legal before being sent to Vice Chancellor for Infrastructure & Safety
10. Once all necessary signatures are present, Admin scans the contract into the appropriate digital filing space as “final executed lease/MOU”
11. Remaining executed are distributed with the appropriate Memo attached
12. Data is entered in ProLease and file is stored in ProLease database
13. Update tickler of critical dates, rent roll, server, and send updated space management form to Kevin Griffin and Wilson Batdorf, if applicable

**Lease Agreement/MOU/License Agreement/Amendment Process (Digital Signatures)**

1. Executed Space Request Form received and saved to server (internal/external or private use)\**note, space request form not required for existing leases or MOU's*
2. Notification that a lease needs to be drafted from the REO or Director
3. Admin drafts contract by using the appropriate template
4. Admin makes a routing sheet including the JREO, SREO, Financial Analyst and Director
5. In DocuSign, Admin formats the document to be initialed by JREO, SREO, Financial Analyst, and Director, and inserts signature placeholders (include signature, date, name, and title). If the document being distributed is a lease agreement amendment, the original lease agreement as well as other amendments must be attached as well so that other parties can reference.
6. Agreement is then routed to appropriate parties, which each of them signing off on it. Once the document is fully executed, all parties receive an executed copy
7. Save executed document into digital file with name formatted as such:
  - a. BUILDING TENANT Fully Executed MOU/Lease Agreement TERM DATE
    - i. MSSC Graduate School of Banking Fully Executed Lease Agreement 6-1-13 thru 7-31-15
8. Data is entered into ProLease
9. Update tickler of critical dates, rent roll, and sent Space Notification Form to Kevin Griffin  
If the agreement is a Lease Agreement, make sure that both boxes below are present at the end of the document::

<p><b>I have reviewed this lease agreement and recommend approval and execution</b></p> <p>BY: _____ <b>Rebecca Fell</b> Interim Executive Director of Real Estate Services</p>
---

<p><b>Approved as to Legal Sufficiency Office of University Counsel</b></p> <p>BY: _____</p> <p>DATE: _____</p>
---

# Late Fees

## Late Fees

- Occasionally our outside tenants require extra motivation to pay their rent by the due date. To help motivate we have various late fee requirements built into the agreements.

Grandview Residential – “The Lessee shall be charged a late fee of \$75.00 for rents received after the 10<sup>th</sup> day of the month.”

Send a reminder to the Grandview students who have not paid via email (blind copy all, cc financial analyst and RE Officers) a week prior to the 10<sup>th</sup> so they are aware in advance they may be charged if rent is not received.

Office/Lab/Parking - Leases & License Agreements – The following is standard language (updated 06.20)

“Late Charges. If any installment of Rent or any other payment payable by Tenant to Landlord under this Lease shall not be paid on or before five (5) days after the date due, Tenant will pay to Landlord a late charge equal to five percent (5%) of such past due payment, which late charge shall be in addition to any interest elsewhere provided for.”

- Enforcement of late fees is at the discretion of RES
- For all tenants whose lease does not contain late fee language (or any of the other recent template updates), it must be added with the next lease amendment, extension, or future negotiation

# Outside Leases Signature Process

# Commercial State Leases

## Wet Signatures/DocuSign

When a CU Boulder Department (department) requires off campus space, the department must complete the Off Campus Space Request Form located on the Real Estate Services (RES) Website <https://www.colorado.edu/res/tenant-information> under Tenant Information TAB and click on Outside Use Space Request Form. Once the form is complete and fully executed via DocuSign E-signature, the Executive Director of Real Estate Services (Director) will submit to State Broker (Broker) and set up a meeting with Broker and Department to discuss department needs. The Broker, Department and Director will find space and negotiate the lease terms.

Tenant Authorization Letter: Prior to distributing the lease for signature, the Broker will submit a Tenant Authorization Letter (TAL) to RES for execution.

RES will distribute via DocuSign for E-signature in the following order:

1. Director review
2. CU Boulder legal review
3. Vice Chancellor for Infrastructure and Sustainability for signature.

Once a lease is negotiated:

1. Broker will draft the lease and distribute for review to Office of State Architect (State), RES and Landlord (LL)
2. Broker will finalize lease with four (4) hard copies to be executed.  
**\*\*Note DocuSign is now an option in lieu of Wet signatures (2020)**
3. Broker will obtain LL signature.
4. Broker will send LL Executed lease to RES for further execution (see distribution below).

It is the responsibility of RES to distribute leases to the appropriate parties, execute in a timely manner, and routed in the following order:

**\*\*Always contact each party ahead of time to let them know Outside Lease is either going to be coming via DocuSign or require wet signatures. See contacts for each office for who to notify. This is sent out prior to routing and updates are sent during routing as it gets close to each party.**

- Attach a Contract routing sheet, provide a brief summary of contract, and any deadline for final signatures
- **\*\*Note:** If insurance language on the state lease has been changed, Risk Management must sign lease.

**Routing:**

1. Steven Stasica (sign routing sheet)
2. Rebecca Fell (sign routing sheet)
  - Risk Management (if applicable, sign routing sheet):
  - Craig Leedholm (designated signatory)
  - Email– [leedholm@cu.edu](mailto:leedholm@cu.edu)

- **Phone:** 303.860.5676
  - **Office:** Craig Leedholm, Risk Mgmt.  
University of Colorado  
1800 Grant Street, Suite 700  
Campus Box 014A  
Denver, CO 80203-1187
3. **University Counsel:** (13 UCB) (Contact UCB legal services @ [ucblegaladmin@cu.edu](mailto:ucblegaladmin@cu.edu))  
**Note: include a private note in DocuSign for Clair, with who reviewed lease previously, so she can assign the lease to them for faster execution.**
    - **Email:** Clair Novi at [Clair.Novi@Colorado.EDU](mailto:Clair.Novi@Colorado.EDU)
    - **Phone:** 303-492-4420
    - **Office:** Legal Cottage, 13 UCB
  4. **Carla Ho-A (sign routing sheet) Requested by Patrick O'Rourke's office; generally needs to sign when money is involved: contact Noah Judson (Special Assistant to CFO) at [noah.judson@colorado.edu](mailto:noah.judson@colorado.edu)**
    - **Phone:** 303-492-3224
    - **Office:** Chancellor's Building, 914 Broadway, Room 209 near Ida Mae & Courtney
  5. **David Kang (sign routing sheet/Real Estate)(Requested by Patrick O'Rourke's office): Contact Courtney Kjelland at**
    - **Email:** [Courtney.kjelland@colorado.edu](mailto:Courtney.kjelland@colorado.edu)
    - **Phone:** 303-735-4508
    - **Office:** Chancellor's Building, 914 Broadway, 2<sup>nd</sup> floor at the end of hallway
  6. **Patrick O'Rourke (sign routing sheet): (contact Cary Ihme**
    - **Email:** [Cary.Ihme@Colorado.EDU](mailto:Cary.Ihme@Colorado.EDU)
    - **Phone:** 303-492-8627
    - **Office:** 914 Broadway, 90 UCB, Boulder, CO 80309
  7. **Chancellor's Chief of Staff \*requested to be added prior to Chancellor Catherine Shea (sign routing sheet)**
    - **Email:** [Catherine.Shea@Colorado.EDU](mailto:Catherine.Shea@Colorado.EDU)
    - **Phone:** 303-492-7896
  8. **Regents of the University of Colorado: Chancellor (signs) (contact Scott E. Bocim)**
    - Scott Bocim handles the hard-copy signature requests for the Chancellor, his email is [Scott.Bocim@colorado.edu](mailto:Scott.Bocim@colorado.edu)  
Phone: 303-492-8908  
17 UCB
    - Mark Berg handles the DocuSign signature requests for the Chancellor, his email is [mark.berge@colorado.edu](mailto:mark.berge@colorado.edu)  
Phone: 303-492-8909

- Shannon Chinatti, Assistant to the Chancellor, helpful for scheduling a signing time for wet signatures  
[Shannon.Chinatti@Colorado.EDU](mailto:Shannon.Chinatti@Colorado.EDU)  
303-492-7033

**9. Office of the State Architect, Real Estate Program**

- Contact: Brandon Ates, Manager, Real Estate Programs  
Email: [brandon.ates@state.co.us](mailto:brandon.ates@state.co.us)  
Phone: 303-866-5458  
Address: 1525 Sherman Street, Suite 112  
Denver, Colorado, 80203
- Chris Swigert, Real Estate Specialist  
Phone: 303-866-2109  
Email: [chris.swigert@state.co.us](mailto:chris.swigert@state.co.us)

**10. Campus Controller - Vicki Nichol (Vicki.Nichol@colorado.edu) Campus Controller (10.2.2020)**

*(Back up signatory is Deputy Controller\*if position exists) (579 UCB) Contact: Chyrl Taylor*

- Email: [chyrl@Colorado.EDU](mailto:chyrl@Colorado.EDU)
- Phone: 303-492-2618
- Office: 579 UCB

[for documents requiring wet signatures] Delivery may require utilization of FedEx (or similar trackable shipping service), courier service, or personal delivery (Do NOT use Campus Mail due to unreliability). Notarization requires in-person notary by legal staff. Contact Clair Novi to coordinate, contact info below.

Once the lease is fully executed, scan the original executed lease and documents, save on the RES network, RES ProLease, and update Rent Roll and contacts on the Admin. Spreadsheet. Place a hard copy in the RES hard file and distribute to appropriate recipients:

- Landlord – Hard copy
- Tenant – Hard Copy
- JLL – Digital Copy
- Office of the State Architect- Hard Copy

For digital DocuSign packages ask the broker to distribute a final Executed copy to the Landlord.

Useful Contacts:

Chancellor’s Office.....Mark Berge 303-492-8909 [mark.berge@colorado.edu](mailto:mark.berge@colorado.edu) (assistant to Chancellor)  
Campus Controller’s Office.....Chyrl Taylor 303-492-2618 [chyrl@Colorado.EDU](mailto:chyrl@Colorado.EDU) (assistant to Controller)  
University Counsel.....Clair Novi 303-492-4420 [clair.novi@cu.edu](mailto:clair.novi@cu.edu) (Executive Assistant)  
CU Real Estate Foundation.....David Chadwick 303-860-6120 [david.chadwick@cu.edu](mailto:david.chadwick@cu.edu)  
Office of the State Architect.....Brandon Ates 303-866-5458  
[brandon.ates@state.co.us](mailto:brandon.ates@state.co.us) (Real Estate Programs)



# Procedure to Lease Off-Campus Space

# Procedure to Lease Off-Campus Space CU Boulder Campus

## Procedure to Lease Off-Campus Space – CU Boulder Campus

1. Any academic unit contemplating the rental of off-campus space must work with their Dean or Institute Director in preparing the following request form. This request form should identify property specifications and means of payment (funding source).
2. The Dean/Institute Director must request approval from the Office of Provost and from the Assistant Vice Chancellor of Planning, Design & Construction (AVC of PDC) to obtain their approval in order to lease space off-campus. If the academic unit is funded by the General Fund, then this request must also be approved by the Associate Vice Chancellor for Finance & Business Strategy (AVC of FBS) prior to engaging state broker. The Provost's Office and PDC will determine if the request is consistent with the campus space and strategic plans.
3. This request form, along with written approvals from the Office of the Provost and the AVC of PDC should be submitted to Real Estate Services (RES) who will work with the State Broker to find appropriate space.
4. Once space is agreed upon, the State Broker and RES will negotiate lease terms and draft a lease for review and execution. The Campus Controller's Office will sign the lease in approval of the funding source. The leasing unit will receive an executed copy.
5. The leasing unit will submit a Standing Purchase Order (SPO) in Marketplace, including a copy of the fully executed lease agreement.
6. Please be sure to consider and budget for expenses outside of rent. These expenses may include cabling, telephone/ Internet services (specifically OIT's cost to provide service and installation to the leased space), moving costs, furniture costs, and other costs that may apply. The department or personnel that oversees these areas will be able to walk you through the process and provide a cost estimate.
7. Please complete attached form and submit via email to Rebecca Fell, Interim Executive Director of Real Estate Services, at [Rebecca.Fell@colorado.edu](mailto:Rebecca.Fell@colorado.edu). Attach additional sheets if more information will be helpful. If you have any questions, please call 303-492-6883.

## OFF-CAMPUS SPACE REQUEST FORM

For Additional Space, New Leased Space, or Renewal of an Existing Lease

Department & College: \_\_\_\_\_

Current Facility: \_\_\_\_\_

Address: \_\_\_\_\_

Use (Office, Lab, Academic, or combination): \_\_\_\_\_

Square Feet: \_\_\_\_\_

Current Base Rent: \_\_\_\_\_

Current Additional Rent: \_\_\_\_\_

Lease Expiration Date: \_\_\_\_\_

Current # FTE: \_\_\_\_\_

Shared Space: YES  NO

Reason for Request: New Lease  Renewal Only  Renewal and/or Expansion

Additional Information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Preferred Location: \_\_\_\_\_

Intended Use (Office, Lab, Academic or Combination): \_\_\_\_\_

Square Feet & Configuration: \_\_\_\_\_

Proposed # FTE: \_\_\_\_\_

Proposed Lease Term: \_\_\_\_\_

Proposed Monthly Rent: \_\_\_\_\_

Timing: \_\_\_\_\_

Configuration Requirements: \_\_\_\_\_

Any Special Needs or Consideration: \_\_\_\_\_

Means of Payment: \_\_\_\_\_

**Program Contact(s)**

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**SUBMIT**

**Approvals**

\_\_\_\_\_  
Dean or Director of Institute \_\_\_\_\_  
Date

\_\_\_\_\_  
Stacy Lindholm, Owner's Representative for Planning, Design & Construction \_\_\_\_\_  
Date

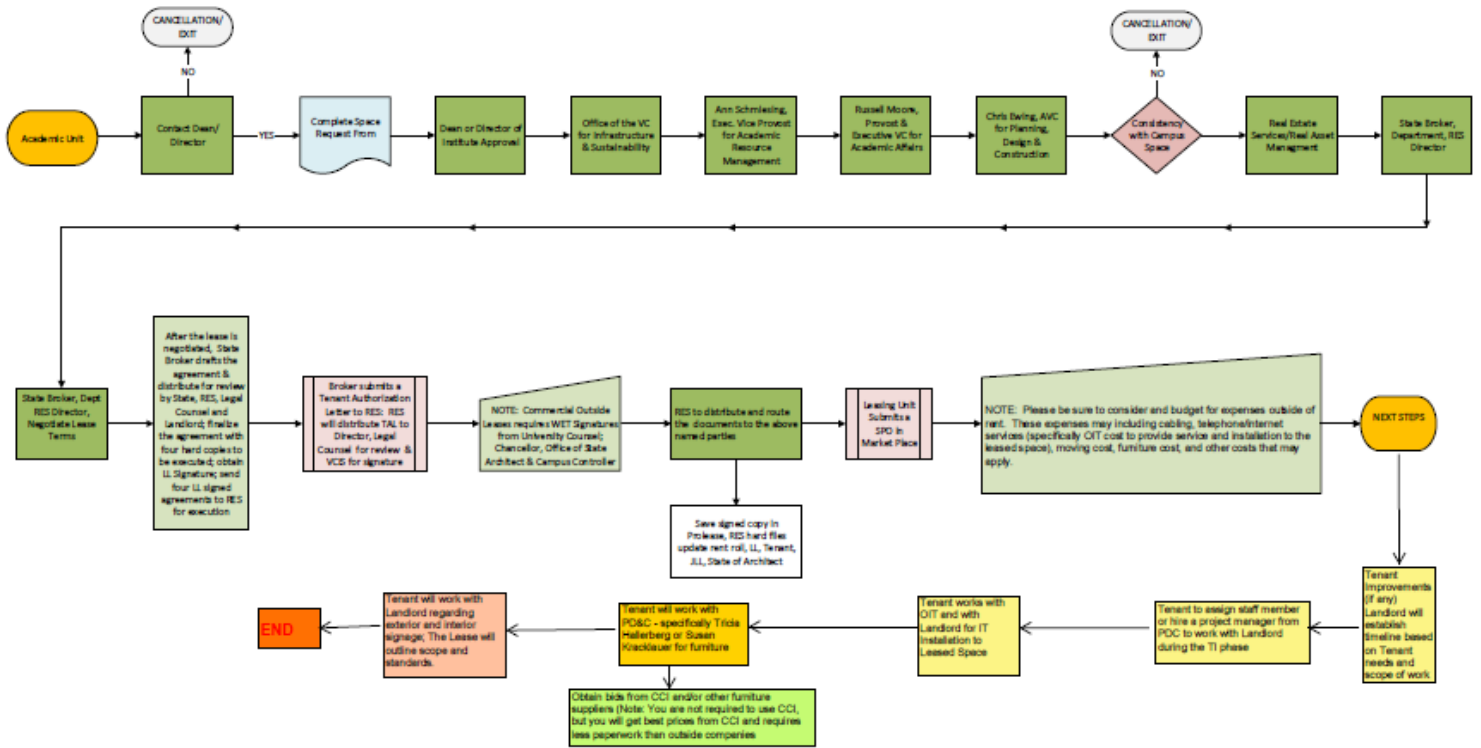
\_\_\_\_\_  
Ann Schmiesing, Executive Vice Provost for Academic Resource \_\_\_\_\_  
Management Date

\_\_\_\_\_  
Russell Moore, Provost and Executive Vice Chancellor for Academic Affairs \_\_\_\_\_  
Date

\_\_\_\_\_  
Chris Ewing, Assistant Vice Chancellor for Planning, Design, & Construction \_\_\_\_\_  
Date

\_\_\_\_\_  
Carla Ho-a, Associate Vice Chancellor & Chief Financial Officer \_\_\_\_\_  
*(Signature required for General Fund requests only)* Date

UNIVERSITY OF COLORADO BOULDER - REAL ESTATE SERVICES – LEASE OFF CAMPUS SPACE



# Space Request Overview

# Space Request Overview

Template File Location: \\sugarloaf\RPS\Website\Website Content files\Forms

- As CU departments and outside organizations inquire about utilization of CU space or off-campus space, the first step is always completing a space use request form
- There are multiple versions:
  - Non-Cellular Antenna/ Rooftop Space Use Request Form
  - Internal Leasing Form
  - Land Use for Research Projects Request Form
  - Off-Campus Space Request Form
  - Private Use Space Request Form
  - Satellite Café Request Form
- Ask the request requesting party to complete the relevant space request form and submit to the JREO or SREO
  - All current versions of the forms can be found on the RES website under Tenant Information: <https://www.colorado.edu/res/tenant-information>
- Prior to uploading for DocuSign distribution approval, confirm that the entire form is filled out with no omitted information
- Administrative Assistant to route the document through all proper channels of approval
- Only after full execution will you begin drafting the lease, license, or MOU agreement

# Private Use Space Request Form



## Private Use Space Request Form

Space is a valuable asset, often requested or needed by competing interests within the University. It is the responsibility of the University to be cognizant of the best and highest use of available space and space assignments. Space is assigned by the Office of the Provost, in alliance with the Dean of the associated College and the associated Department/Unit.

Before agreeing that a lease to a private entity does indeed advance campus goals, the following must be understood and conveyed in the Private Use Space Request Form.

1. A faculty member or staff member requesting space rental on behalf of a private sector entity must complete all applicable sections of Form. If necessary, provide an additional detailed explanation as to the nature of the request.
2. The Dean or Director, with direct control of the space being requested, must sign the form. For Arts & Sciences only, Department Chair approval must be obtained before Dean's or Director's approval. Signature indicates agreement that space will be returned to campus use before a similar space is requested or can be provided to the Dean's or Director's unit.
3. After meeting the above requirements, Real Estate Services will route the request for approval through the Office of Export Controls, the Office of Conflicts of Interest & Commitment, the Office of Contracts & Grants, the Office of Venture Partners, the Academic Resource Management Office, and the Campus Controller's Office for review of any conflicts of interest and intellectual property issues.
4. Upon approval by those parties, the request will be processed by Real Estate Services for lease preparation.
5. Any lease will be subject to the terms and rates established by Real Estate Services. Leased space may be required to be demised and separable from the space and activities of all other research units. The rental revenue will be split, the department will receive 30% and the Provost's office will receive 70% of the total revenue generated from leasing of the space.
6. Completed Private Use Space Request Form must be submitted to Real Estate Services via email to [Steven.Stasica@Colorado.EDU](mailto:Steven.Stasica@Colorado.EDU) or [Kimberly.Pepitone@Colorado.EDU](mailto:Kimberly.Pepitone@Colorado.EDU). You may also email Rebecca Fell, Interim Executive Director of Real Estate Services, [Rebecca.Fell@Colorado.EDU](mailto:Rebecca.Fell@Colorado.EDU), with any questions or concerns.

**Private**

**Request for Lease of Campus Space to Private Entity Form**

**SUBMITTED BY:**

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 College or Unit: \_\_\_\_\_  
 Contact information: \_\_\_\_\_

**DEPARTMENT CHAIR approval: (Arts & Sciences ONLY)**

Print Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 Date: \_\_\_\_\_

**DEAN or DIRECTOR approval: (Approval indicates agreement that the space will be returned to campus use before similar space is requested or can be provided to the Department/Unit)**

Print Name: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Date: \_\_\_\_\_

**DESCRIPTION OF NEED AND TIME TABLE:**

Information Needed		
Reason for Request	New Lease <input type="checkbox"/>	Renewal Only <input type="checkbox"/> Renewal and/or expansion <input type="checkbox"/>
What is the general request?	General nature of use and specific activities to be conducted in space. Please include how the use of space will advance university objective as well as the connection between requestor, university and company (may include attachment).	
	Why can this work not be accomplished through a sponsored research agreement (managed through OCG)?	
Premises: (Answer each specifically)	<ul style="list-style-type: none"> <li>• Building name</li> <li>• Room number</li> <li>• Sq. ft. requested</li> <li>• Number of people expected to be using space</li> <li>• Commencement Date</li> <li>• Term of use</li> </ul>	
Use of Premises:	<ul style="list-style-type: none"> <li>• Office</li> <li>• Lab</li> <li>• Office and Lab</li> </ul>	
What will be used? (provide details)	<ul style="list-style-type: none"> <li>• Lab equipment</li> <li>• Supplies (towels, gases, other, etc.)</li> <li>• How will the cost for use of these items be covered?</li> </ul>	

Export control:	<ul style="list-style-type: none"> <li>Activities in this premise subject to export controls</li> </ul>	
	<ul style="list-style-type: none"> <li>Is work to be done subject to export controls? <ul style="list-style-type: none"> <li>Is the end use or application of work contemplated known?</li> <li>If so, what is end use?</li> <li>Will faculty member(s) be directly involved in work?</li> <li>If so, how?</li> </ul> </li> </ul>	
	<ul style="list-style-type: none"> <li>Will there be international transactions contemplated involving the faculty member or University?</li> </ul>	
Intellectual Property:	<ul style="list-style-type: none"> <li>Will any new IP be generated?</li> <li>Does the work relate to any existing CU IP?</li> </ul>	
Is any of the work considered proprietary or confidential?	<ul style="list-style-type: none"> <li>Other activities in the space</li> <li>Work to be done</li> <li>If so, how will the confidentiality be maintained?</li> </ul>	
Relationship between company and CU?	<ul style="list-style-type: none"> <li>What is connection between requestor and company?</li> <li>Any sponsored research projects between CU &amp; company?</li> <li>Does CU have any ownership or royalty rights?</li> <li>Any other connection?</li> </ul>	
Company personnel:	Does company employ or utilize any CU personnel? If so, list names and nature of relationship.	
Is there a reason this work can't be done as sponsored research project?	How is this activity separate and distinct from a CU sponsored research project?	
Is updated DEPA on file?	To your knowledge, confirm that DEPA is current.	
Conflict of Interest (COI) Management Plan (previously COI MOU):	If applicable, is there a COI Management Plan in place?	



## Vetting and Approvals

### DEAN OR DIRECTOR

\_\_\_\_\_ Date \_\_\_\_\_

### REAL ESTATE SERVICES

\_\_\_\_\_ Date \_\_\_\_\_

Rebecca Fell – Interim Executive Director of Real Estate Services

### OFFICE OF EXPORT CONTROLS

\_\_\_\_\_ Date \_\_\_\_\_

Linda Morris, Export Controls Compliance Administrator

### OFFICE OF CONFLICTS OF INTEREST AND COMMITMENT

\_\_\_\_\_ Date \_\_\_\_\_

Samantha Hertzog, Director of Office of Conflicts of Interest and Commitment

### CAMPUS CONTROLLER'S OFFICE, FISCAL COMPLIANCE

\_\_\_\_\_ Date \_\_\_\_\_

Greg M. Brown, Fiscal Compliance Analyst

### OFFICE OF CONTRACTS AND GRANTS

\_\_\_\_\_ Date \_\_\_\_\_

Justin Mack – Authorized Signatory, Office of Contracts & Grants

### VENTURE PARTNERS AT CU BOULDER

\_\_\_\_\_ Date \_\_\_\_\_

Bryn Rees - Managing Director, Venture Partners

### OFFICE OF THE PROVOST AND EXECUTIVE VC FOR ACADEMIC AFFAIRS

\_\_\_\_\_ Date \_\_\_\_\_

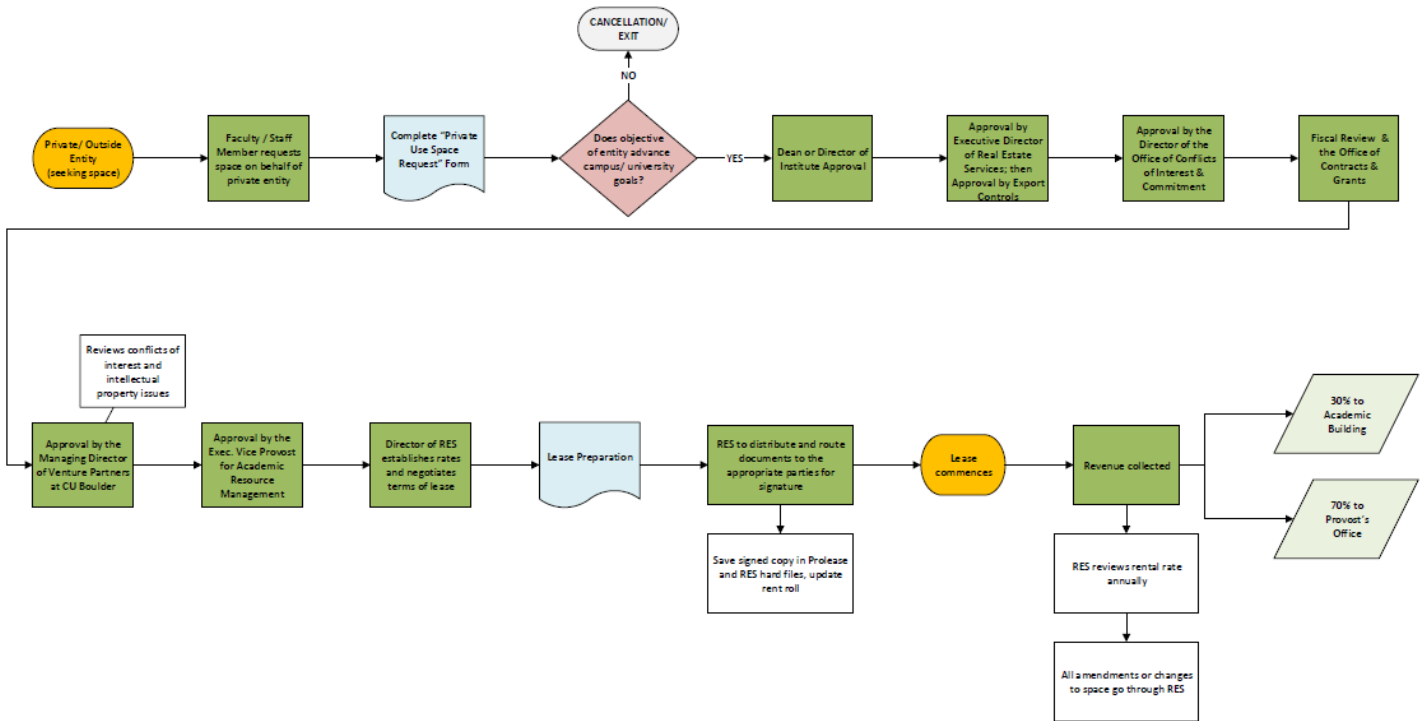
Ann Schmiesing - Executive Vice Provost for Academic Resource Management

### CAMPUS CONTROLLER'S OFFICE

\_\_\_\_\_ Date \_\_\_\_\_

Vicki Nichol- Campus Controller

UNIVERSITY OF COLORADO BOULDER – REAL ESTATE SERVICES – PRIVATE ENTITY LEASING



# Antenna Site & Rooftop Space Use Request Form

## Antenna Site & Rooftop Space Use Request/Modification Form

Rooftop space is utilized for a variety of reasons. It is the responsibility of the University to be cognizant of the best and highest use of available sites, and site assignments.

Prior to allowing installation or utilization of an antenna site on University property, please ensure the following:

1. The party (faculty member, staff member, or outside entity) making a request for antenna installation or utilization on behalf of an internal department or private sector concern, must complete all applicable sections of form. If necessary, provide an additional detailed explanation as to the nature of the request
2. \*Internal sites only - Any Dean or Director with direct control of the funding for the equipment to be installed must sign the form. Signature indicates agreement that the site will be returned to campus use, and in the same condition received, before similar site is requested or can be provided to the Dean/Director's unit.
3. Each submission must include design plans, detailed site drawings, and photo simulations of the requested location. All design plans are subject to approval from the Design Review Board (DRB).
4. After meeting the above requirements, the request form, design plans, drawings, & photo simulations should be forwarded to the Real Estate Services (RES) Office.
5. Pending approval by Planning, Design, & Construction (PD&C) and the Office of Information Technology (OIT) the request will be routed to the Director of Real Estate Services for site use agreement preparation. Be advised the party requesting Antenna Site and/or Roof Top space is responsible for Planning, Design, & Construction (PD&C) and the Office of Information Technology (OIT) charges to review the proposed plans and site requirements.
6. Each submission subject to Building Code review and permitting by the Authority Having Jurisdiction (AHJ).
7. Any lease/memorandum of understanding will be subject to the terms of the Director of Real Estate Services at rates established by Real Estate Services. Sites rented may be required to be demised and clearly separable from the site and activities of all other research units.
8. All requests for use or rental of CU sites must be submitted to Real Estate Services via email to [Kimberly.Pepitone@Colorado.EDU](mailto:Kimberly.Pepitone@Colorado.EDU) or [Steven.Stasica@Colorado.EDU](mailto:Steven.Stasica@Colorado.EDU).



## Antenna Site & Rooftop Space Use Request/Modification Form

SUBMITTED BY:

Name:

Title:

Department/Organization:

College or Unit:

Email:

Phone:

Funding Source approval of request: (Approval indicates agreement that the site will be returned to campus use in the same condition as received before similar site is requested or can be provided to the Dean/Director's unit)

Print Name:

Email:

Date:

New Site Request     
  Existing Site Upgrade/Modification

<u>General Information</u>	
If existing site provide site ID and/or location:	
CU Department or outside entity?	
What is the purpose of this rooftop site request?	
Which building/property are you requesting installation on or at?	
Provide the start/end dates equipment will be installed and removed:	
Estimated monthly cost to operate equipment?	

Project Coordination alone could be costly. What/who is your Guaranteed Funding Source?	
Provide name & contact information for 24/7/365 notices:	
<b><u>Site Details (Attach Plans)</u></b>	
Footprint dimensions of site:	
Describe equipment to be installed, location, and type of materials:	
How will equipment be hooked up to building utility lines? If not, how will it be powered?	
<b><u>STRUCTURAL CALCULATIONS</u></b> Provide design parameters: (wind speed, exposure factor, etc.)	
Provide Formulas Used:	
Selection of materials: (anchor bolts, etc.)	
Weight of Equipment: (provide itemized breakdown)	
<b><u>Interference / Federal Communications Commission (FCC)</u></b>	
Which frequency will be utilized?	
Will signal Interfere with CU signals? Is there potential that the signal will interfere with existing antenna signals?	

FCC Licensing Required?	
Describe the level of RF Exposure in relation to FCC's Maximum Permissible Exposure (MPE) limits	
<u>Additional Details</u>	

**SUBMIT**

Vetting and Approvals

**FACILITIES PLANNING**

\_\_\_\_\_  
Chris Ewing, Assistant Vice Chancellor,  
PD&C

Date: \_\_\_\_\_

**CAMPUS CIVIL ENGINEER**

\_\_\_\_\_  
Jonathan Akins

Date: \_\_\_\_\_

**OFFICE OF INFORMATION TECHNOLOGY**

\_\_\_\_\_  
Kyle Ragan, Associate Director, Network Engineering &  
Operations

Date: \_\_\_\_\_

**REAL ESTATE SERVICES**

\_\_\_\_\_  
Steven Stasica, Senior Real Estate Officer,  
Real Estate Services

Date: \_\_\_\_\_

# Cell Antenna Site Requirements & Application

## Cellular Antenna Site Application Requirements

Prior to allowing installation or utilization of an antenna site on University of Colorado Boulder property, please ensure the following:

1. Before completing this application, please contact Steven Stasica (steven.stasica@colorado.edu) to schedule a preliminary meeting to discuss the feasibility of the request.
2. The carrier making a request for antenna installation or modification to an existing site must complete all applicable sections of the application form and provide all other required documents.
3. Application fee of \$3,000 (due at time of application submission). Fee is non-refundable and will be applied towards University charges for plan review and project coordination. Applicant is responsible for all University charges that exceed the amount of the initial application fee.
4. Proof of agent authorization (to act on carrier's behalf).
5. Inventory of existing sites, to include a written narrative and map description of the carrier's existing or then currently proposed macro and/or small cell facilities on University premises'. In addition, the applicant shall inform the university generally of the areas on campus in which it believes small cell facilities may need to be located within the next three years. The inventory list should identify the site name, site address or general vicinity if no address is known, and a general description of the facility (i.e. rooftop antennas and ground mounted equipment).
6. Technical Plans or Construction Documents signed and sealed by appropriate qualified professionals of the proposed installation(s) with new and existing equipment labeled, as applicable. The plans must be drawn to scale with a north arrow and include the following:
  - If multiple facilities are requested (consolidated application), a master siting map, which includes the locations of all small cell facilities proposed with the application and an identification system for each site (site names, numbering, etc.).
  - Detailed plan drawings for each facility, including the following:
    - Large scale site plan that includes adjacent streets and access pathways, and other existing university infrastructure. Include the locations of all transmission equipment related to the facility, including antennas, radio transceivers, coaxial or fiber-optic cable, and regular and backup power supply. Include all existing and proposed features within 20 feet of facility including adjacent properties and right of ways (landscaping, trees, bike racks, tree grates, parking meters, benches, awnings, signs, doors, lights, hydrants, fencing, manholes, fire hydrants, etc.). Include the setbacks to buildings and sidewalk clearance adjacent to the vertical infrastructure and facility, if applicable. Include any proposed tree removal locations.
    - Small scale site plan that shows the proposed separation of the facility from all other wireless communication facilities and small cell facilities within 600 feet of the facility.
  - Elevation drawings of proposed facility that call out the height of the vertical infrastructure, antenna(s), and all exposed elements from grade and clearance to sidewalk, if applicable. Include below grade equipment vaults and the locations of all transmission equipment related to the facility, including antennas, radio transceivers, coaxial or fiber-optic cable, and regular and backup power supply. Include the dimensions of each antenna enclosure and of all exposed elements.
7. Detailed plans for the screening of antenna and other transmission equipment, including equipment enclosures and vaults. Plans to include sample exterior materials, with material finish, and colors.

8. If placed on existing vertical infrastructure, engineering analysis demonstrating that the existing vertical infrastructure can support the additional loads created by the attachment(s).
9. If new or replacement vertical infrastructure is proposed, provide specifications and attachment details for the new structure.
10. If below grade equipment vaults are proposed, specifications on proposed vault and cover and plans showing the horizontal and vertical distances from all existing utilities, property lines, and easement boundaries. Include details on materials removed and/or replaced in the right of way (concrete, asphalt, masonry, or stonework, etc.). Provide details for drainage of vault including discharge of pumping equipment.
11. Attachment details.
  - Photographs of existing conditions and photo simulations of proposed installation(s) demonstrating architectural compatibility and screening method. Include a map depicting where the photographs were taken.
  - If new or replacement vertical infrastructure is proposed, a report from a qualified and licensed professional engineer and/or statement from the manufacturer that describes the capacity for collocation.
  - If a facility is proposed on existing structure, a letter from a qualified and licensed professional engineer certifying that the antenna installations will be placed in a manner so that the size, appearance, and function of the structure will not be considerably altered.
12. Additional materials as requested at the time of staff review.
13. Pending approval by Planning, Design, & Construction (PD&C) and the Office of Information Technology (OIT) the request will be routed to the Director of Real Estate Services for site use agreement preparation. Be advised the party requesting Antenna Site and/or Roof Top space is responsible for Planning, Design, & Construction (PD&C) and the Office of Information Technology (OIT) charges to review the proposed plans, site requirements, and project coordination.
14. Each submission subject to Building Code review and permitting by the Authority Having Jurisdiction (AHJ).
15. Any lease/license agreement will be subject to the terms of the Director of Real Estate Services at rates established by Real Estate Services. Sites rented may be required to be demised and clearly separable from the site and activities of all other research units.
16. All applications must be submitted to Real Estate Services via email to [Kimberly.Pepitone@Colorado.EDU](mailto:Kimberly.Pepitone@Colorado.EDU) or [Steven.Stasica@Colorado.EDU](mailto:Steven.Stasica@Colorado.EDU), or by using the 'SUBMIT' button at the end of this form (ONLY compatible with Internet Explorer).

## Small Cell Requirements

### **1. Design Standards**

Small cell facilities may be permitted if all of the following standards are met:

- (1) Attached to Existing Facilities. Attachment of facilities on an existing or replacement light pole, or other vertical infrastructure is encouraged. These facilities may be permitted provided that:
  - (A) The facility meets the compatibility design techniques to conceal the equipment, and the facility does not exceed the height of the existing infrastructure on which it is mounted by more than ten feet; or
  - (B) Each antenna is located inside an enclosure of no more than three cubic feet in volume or, in the case of an antenna that has exposed elements, the antenna and all of its exposed elements could fit within an imaginary enclosure of no more than three cubic feet.
- (2) Freestanding Facilities. Where a new freestanding facility is proposed (that is not an attachment to existing infrastructure or a replacement pole), a freestanding small cell facility may be permitted, provided that:
  - (A) The facility:
    - i. Proposes a new pole with an antenna that is architecturally compatible with the surrounding area through application of the compatibility requirements of this section; and
    - ii. Existing trees shall be preserved to the maximum extent possible.
  - (B) The maximum facility height, including both vertical infrastructure and antenna, is no more than:
    - i. Thirty feet
    - ii. The facility height does not exceed the height limitations of the University
  - (C) Each antenna is located inside an enclosure of no more than three cubic feet in volume or, in the case of an antenna that has exposed elements, the antenna and all of its exposed elements could fit within an imaginary enclosure of no more than three cubic feet.



- (3) Compatibility Required. Compatibility techniques shall be used in the design and siting of small cell facilities. The compatibility techniques will minimize or eliminate the visual impact of such facilities to surrounding uses. A small cell facility shall utilize compatibility techniques by:
  - (A) Utilizing or replacing existing permitted facilities (including without limitation, traffic signs, light poles or light standards) so that the presence of the small cell facility is not readily apparent;
  - (B) Integrating the equipment in an architectural feature of an existing structure;
  - (C) Integrating or attaching equipment to an outdoor fixture such as a light standard, utility pole or flagpole;
  - (D) Using a design which mimics or is consistent with the nearby natural or architectural features; and
  - (E) Being consistent with the size and shape of the pole-mounted equipment installed by communications companies on structure within three hundred feet of the facility.
- (4) Non-reflective Materials. The visible exterior surfaces of small cell facilities, such as poles, antennas, vaults and equipment enclosure structures shall be constructed out of or finished with non-reflective materials and shall be painted to match as closely as possible the color and texture of the vertical infrastructure on which it is mounted.
- (5) Equipment Vaults Below Grade. Due to potential impacts to underground irrigation lines, utilities and drainage, reasonable efforts must be made to install all equipment above grade. If above grade equipment space is not an available option, equipment vaults and other transmission equipment associated with the pole and antenna, may be placed below grade, if compatibility techniques of this section are otherwise met.
- (6) Multiple Users. To the extent practical, all small cell facilities shall be designed and constructed to permit such facility to accommodate at least two wireless service providers on the same facility.
- (7) Separation. The facility shall be separated from all other wireless communication facilities and small cell facilities by a distance of at least six hundred feet, unless the facility replaces an existing street light pole or similar vertical infrastructure.
- (8) Lighting. No exterior lighting may be installed for the benefit of small cell facilities, unless required by the FAA or other applicable governmental authority or the small cell facility is mounted on a light pole or other similar structure primarily used for lighting purposes.
- (9) Historic Preservation. Any small cell facility that is constructed on a historic building shall be required to get an alteration certificate. The University facility manager is the approval authority for alteration certification.
- (10) Public Safety. Any ground mounted equipment shall be located in a manner necessary to address both student safety and aesthetic concerns in the reasonable

discretion of the University facility manager. The applicant shall demonstrate that the vertical infrastructure to which any equipment is fastened to can safely support such equipment.

- (12) Sidewalk Clearance. Any encroachment on a sidewalk shall maintain a minimum clearance of twenty feet vertically and horizontally of unobstructed pedestrian way. The requirements of this paragraph may be modified by the University if reasonable passage is provided on the sidewalk and the safety of pedestrians, bicyclists and motorists is not impaired.
- (13) Unreasonable Interference with Traffic and Parking Prohibited. Small cell shall not alter pedestrian or vehicular circulation or parking, or impede vehicular, bicycle or pedestrian access or visibility. All equipment installations shall comply with the Americans With Disabilities Act and every other local, state and federal law and regulation. No small cell may be located or maintained in a manner that causes unreasonable interference. Unreasonable interference means any use that disrupts or interferes with its use by the University, the general public or other persons authorized to use or be present upon on the property, when there exists an alternative that would result in less disruption or interference. Unreasonable interference includes any use of that disrupts vehicular or pedestrian traffic, any interference with public utilities and any other activity that will present a hazard to public health, safety or welfare.

## **2. Exclusion of Competitors Prohibited**

No small cell facility owner or lessee or officer or employee thereof shall act to exclude or to attempt to exclude any other competitor from using the same structure for the location of other antenna.

## Cellular Antenna Site Application

SUBMITTED BY:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company/Organization: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

SITE OWNER CONTACT (Carrier):  Check if same as Applicant

Company: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

New Site Request       Existing Site Upgrade/Modification

<u>General Information</u>	
If existing site provide site ID and/or location:	_____
What is the purpose of the antenna site installation or modification (improve coverage, increase capacity, upgrade/add equipment, etc.)?	_____
Which area/building/property are you requesting installation on or at?	_____
Provide the start/end dates equipment will be installed and removed:	_____

Estimated monthly cost to operate equipment? Provide the start/end dates equipment will be installed and removed:	
Project Coordination alone could be costly. What/who is your Guaranteed Funding Source? Estimated monthly cost to operate equipment?	
Provide name & contact information for 24/7/365 notices: Project Coordination alone could be costly. What/who is your Guaranteed Funding Source?	
<b>Site Details (Attach Plans/Drawings)</b>	
Footprint dimensions of site:	
Describe equipment to be installed, location, and type of materials:	
How will equipment be hooked up to building utility lines? If not, how will it be powered?	
<b><u>STRUCTURAL CALCULATIONS</u></b> Provide design parameters: (wind speed, exposure factor, etc.)	
Provide Formulas Used:	
Selection of materials: (anchor bolts, etc.)	
Weight of Equipment: (provide itemized breakdown)	

<u><b>Interference / Federal Communications Commission (FCC)</b></u>	
Which frequency will be utilized?	
Will signal Interfere with CU signals? Is there potential that the signal will interfere with existing antenna signals?	
FCC Licensing Required?	
Describe the level of RF Exposure in relation to FCC's Maximum Permissible Exposure (MPE) limits	
<u><b>Additional Details</b></u>	

**SUBMIT**

## Vetting and Approvals

### FACILITIES PLANNING

\_\_\_\_\_  
Chris Ewing, Assistant Vice Chancellor,  
PD&C

Date: \_\_\_\_\_

### CAMPUS CIVIL ENGINEER

\_\_\_\_\_  
Jonathan Akins

Date: \_\_\_\_\_

### OFFICE OF INFORMATION TECHNOLOGY

\_\_\_\_\_  
Kyle Ragan, Associate Director, Network Engineering &  
Operations

Date: \_\_\_\_\_

### REAL ESTATE SERVICES

\_\_\_\_\_  
Steven Stasica, Senior Real Estate Officer,  
Real Estate Services

Date: \_\_\_\_\_

# Updating website

# Updating the Website

To forewarn you, this website building program is not very user-friendly at first

For a full listing of tutorials and trainings visit: <http://www.colorado.edu/webcentral/>

Fortunately, the framework is in place and updates are easier with the framework set up.

To access the editing site, go to: [www.colorado.edu/res/user](http://www.colorado.edu/res/user) and login with your Identikikey and password. All of the instructions below can only be done if you are in the editing interface.

Check **monthly** to confirm up to date:

- Vacancy Maps (also, update with every new Lease/MOU/Amendment/License)
- Occupancy Maps (also, update with every new Lease/MOU/Amendment/License)
- Holiday dates - <http://www.cu.edu/employee-services/holidays> (Choose CUBOULDER)

The tools are separated out into:

- Content
- Structure
- Appearance
- Configuration
- Help

## To change the text on a page or add a picture

1. Go to the page you want to update
2. Click "Edit" and change the text, add a picture, and create hyperlinks (see picture)
3. Make the edits in the "Body" section
4. Click Save and ALWAYS preview the page before moving on to another project

*Edit Basic page* Current Vacancies

The screenshot shows a web editor interface for editing the page 'Current Vacancies'. At the top, there are two tabs: 'Font Formatting' and 'Add a picture (see instructions for adding content, you must do this first)'. Below the tabs is a 'BODY (EDIT SUMMARY)' section containing a rich text editor toolbar. The toolbar includes options for bold (B), italic (I), underline (U), text color (abc), background color (X2), font size (14), and other formatting tools. A red box highlights the font formatting tools, and a red circle highlights the 'Add a picture' icon. A red arrow points from the 'Add a picture' icon to the text 'Make the picture or text a hyperlink or take the hyperlink off'. The main content area shows the text 'To schedule a walk through of any of our spaces, please call 303-492-6883' and 'UPDATED 6/10/2014'. Below this is a section titled 'Marine Street Science Center' with a floor plan image. The status bar at the bottom shows 'body p a span strong'.



### **To add content (PDF, JPG, Word Document)**

1. Go to “Content” at the top bar of menus then click “Add Content”
2. Select “File” and Name it something easy along with the file type (MSSC Occupancy Map JPG)
3. Click “Choose File”, navigate to the file, click Open, then Upload
4. Click Save

### **To Put New Content on a Page**

1. Go to “Content” and click on the picture/PDF/etc. you want to add
2. Copy the “Preferred Version” URL
3. Navigate to page that you want to add content to and click Edit
4. If adding a picture, click the picture icon (noted in picture above) and paste the URL copied in step 2 then click OK
5. If creating a hyperlink that takes you to a PDF or other website, click on the picture or highlight text you want to link to the other content and click the hyperlink icon. Paste the URL copied in step 2 into the URL blank and click OK

### **To Update Content Already on a Page**

1. Go to “Content” and click on the item that you wish to update (Ex: MSSC VacancyMap PDF)
2. Click Edit
3. Remove the existing file by clicking “Remove”
4. Upload new file by selecting “Choose File”, double-clicking on the file, then click “Upload”
5. Click “Save”

# ProLease Management

# Prolease

The full ProLease manual: <https://www.proleaseweb.com/help/ProLeaseManual.pdf>

## Dictionary

- ❏ Subtenant = tenant
- ❏ Address = name of building
- ❏ Owned = we rent space to other people
- ❏ Leased = CU rents space from outsidelandlord
- ❏ RSF = Usable Square Footage
- ❏ Primary Lease Code = Tenant Name Abbreviation
- ❏ Property Code = Building abbreviation
- ❏ Critical date = lease expiration, lease expiration reminder, insurance expiration

## Running a Critical Dates Report

1. Login to Prolease (www.proleaseweb.com)
2. Click "Open Database"
3. Click "Run a Report"
4. Double-click "Critical Dates byDate"
5. Change Dropdown Menu next to "Lease Category" to "AllSubtenants"
6. Choose your critical date range
7. Click "Run Report"
8. Report will come up, then it needs to be exported to Excel

## Looking up a Lessee

1. Login to Prolease (www.proleaseweb.com)
2. Click "Open Database"
3. "Search for an ExistingProperty"
4. "Find All"
5. Double-click which building the tenant is in
6. The list of "Subtenants" will come up
7. Double-click on which tenant you would like to look at

## Updating Lease as a Result of an Amendment

1. Do all of the steps for "looking up a lessee"
2. Go to Screen 11: "Lease Term/Options" and change the expiration date to the new expiration date (if applicable) and click "Next" (you will probably get two error messages, just say OK to both)
3. Go to Screen 12: "Rentable Area/Subspaces" and click "Add New Subspace"
  - a. Fill in the Rentable SF, change the commencement date to the day after the previous agreement/amendment expires or when this particular agreement is starting. Verify that the expiration date is correct and matches the executed agreement/amendment.
  - b. Select the reason for the subspace from the drop down menu (more than likely it will either be renewal, expansion, or deletion)

- c. Add a New Floor for each room the occupant has. Name it "Room\_\_\_\_\_" and put the associated square footage in the RSF spot. Click OK and repeat until all the rooms are inputted.
- d. Once all rooms have been put in, the total square footage at the bottom of the page titled "Subspace details" should match the rentable square footage at the top of the same page. If they don't check your room data that you put in in step 3c.
- e. Click OK.
4. Screen 13: Base Rent
  - a. Select the subspace that you just added in step 3
  - b. Click the + sign next to Add Another Base Rent Line
  - c. Input all rent amounts that you know (sometimes you won't know what next year's rate will be so don't put it in).
5. Screen 34: Amendments
  - a. Click the + sign next to "Add New Amendment"
  - b. Type in the corresponding amendment number. The amendment date is the last signature date of the original lease agreement.
  - c. In the amendment comments section, write "Amendment # - What the amendment is about". (Example: Amendment #2 – Extend Agreement to End 3-31-14)
  - d. Click OK
6. Screen 40: Documents
  - a. Click the + sign next to "Add New Document"
  - b. Select the Document Type (for this, it will *generally* be "Amendment")
  - c. Type the same description that you did in step 5c
  - d. Select file → choose file → navigate to executed document → double click on the document
  - e. Click OK and then OK again
7. You're done! (Click Done)

### **Inputting a New Lease Agreement**

This process is very similar to Updating Lease as a Result of an Amendment.

1. Go into the property to which you want to add a tenant.
2. Click the + sign next to Add New Lease/Subtenant
3. For the dropdown box next to Subtenant, either select one of the options or add an option by clicking the "M" button next to the drop down.
  - a. Click the + sign next to Add New Subtenant and type the name in. This will add the new tenant as an option.
4. Select the primary use for the space
5. Input the total square footage the tenant will be leasing as well as the Commencement Date and Expiration Dates then click OK
6. Screen 10: "General Lease Info"
  - a. Update the Ls Code 1 (Prim Lease Code) to something short and easy to understand (ie: Red Cross-WALN). This code is what will show up on all reports for the Subtenant Name
  - b. Input the Use Clause (this is generally the first section from the Lease Agreement/MOU)
7. Screen 11: "Lease Term/Options"
  - a. Ensure that the commence date and expiration date are accurate
  - b. Input any Options you see applicable from the agreement
8. Screen 12: "Rentable Area/Subspaces" and double-click the Initial Subspace

- a. Add a New Floor for each room the occupant has. Name it "Room\_\_\_\_\_" and put the associated square footage in the RSF spot. Click OK and repeat until all the rooms are inputted.
  - b. Once all rooms have been put in, the total square footage at the bottom of the page titled "Subspace details" should match the rentable square footage at the top of the same page. If they don't check your room data that you put in in step 3c.
  - c. Click OK.
9. Screen 13: "Base Rent"
- a. Click the + sign next to Add Another Base Rent Line
  - b. Input all rent amounts that you know (sometimes you won't know what next year's rate will be so don't put it in).
8. Screen 29: "Insurance/Asset Replacement Cost"
- a. Click the + sign next to Add New Insurance
  - b. Pick "General Insurance" from the drop-down next to Insurance Company
  - c. Pick the company from the dropdown. If it is not there, "Add New Company" and input the name and company type. No need to put other information.
  - d. Input the expiration date in the box next to critical date and the policy number
  - e. Click the three checkboxes that say "yes" (unless it doesn't apply, but generally it does)
9. Screen 40: "Documents"
- a. Click the + sign next to "Add New Document"
  - b. Select the Document Type (for this, it will *generally* be "Lease Agreement" or "Memorandum of Understanding")
  - c. Name the file "BUILDING Tenant Executed MOU/Lease Agreement Term Date". (Example: MSSC Graduate School of Banking Executed Lease Agreement 6-1-14 thru 5-31-15)
  - d. Select file → choose file → navigate to executed document → double click on the document
  - e. Click OK and then OK again
  - f. Repeat for Certificate of Insurance and Name accordingly

### Updating Insurance Information

1. Do all of the steps for "looking up a lessee"
2. Screen 29: "Insurance/Asset Replacement Cost"
  - a. Update the insurance expiration date to the new expiration and verify that the insurance information is accurate. If it is not, go into the policy and update accordingly.
  - b. If there is no insurance inputted:
    - i. Click the + sign next to Add New Insurance
    - ii. Pick "General Insurance" from the drop-down next to Insurance Company
    - iii. Pick the company from the dropdown. If it is not there, "Add New Company" and input the name and company type. No need to put other information.
    - iv. Input the expiration date in the box next to critical date and the policy number
    - v. Click the three checkboxes that say "yes" (unless it doesn't apply, but generally it does)
  - c. Make sure to upload the new Certificate of Insurance into the Documents section on Screen 40.

# DocuSign & Updating the A-Z Listing

## DocuSign

- The best resource for learning the DocuSign process is by visiting their online training tools:

Online Support: <https://support.docusign.com/>

How To Videos: <https://support.docusign.com/en/videos>

- RES' Utilization of DocuSign is summarized below:

### Manage Section

- This is where you can see all the agreements that are out for signature and where they are. If a contract has been with someone for longer than a week, send them a reminder once a week until it gets signed.

### Send Section – Process for sending documents

1. Documents for Signature - Upload documents for signature by clicking “Browse from my Computer” in top left screen. Routing Sheet is always 1<sup>st</sup> page
2. Recipients and Routing - Enter the email addresses *in order* of all who need to sign the document. It will save you a lot of headache later if you get the correct e-mail address right off the bat. Enter recipient order in left column
3. Email Message - Name the document and include a message that summarizes the purpose of the document.
4. Envelope Settings – Here you can customize reminder settings and adjust editing & viewing settings
5. Click the Next
6. The next page that comes up will allow you to place the signature fields. To do so, pick the participant and place the appropriate fields throughout the document. Repeat the process for each signor
7. Click Preview – Review your signature locations and ensure names match corresponding sections on document
8. Click Send

### Updating the A to Z Directory

1. Go to <https://atozadmin.colorado.edu>
2. Login using your Identikey name and password (contact Bea Steiner at [Beatrice.Steiner@colorado.edu](mailto:Beatrice.Steiner@colorado.edu) to get setup)
3. The program is pretty self-explanatory from there, but you can always contact Bea with questions.

# Certificates of Insurance



# Certificates of Insurance (COI)

- ☐ All non-CU departments are required to have a current Certificate of Insurance on file
- ☐ After every staff meeting, check critical date report from ProLease and confirm all COIs are current. If they are not, contact tenant immediately requesting they send you one (digital or hard copy). If necessary, provide sample COI.
- It is required by CU Risk Management that all COIs have the verbiage: “The Regents of the University of Colorado, a Body Corporate, and its officers, employees, agents and volunteers are Additional Insured as respects General Liability”. This is specified in the lease language.
- All insurance certificates must be saved to the tenant’s server file and entered into ProLease
- ☐ In ProLease, make sure to upload the document as well as input the policy. If existing policy information is in place, only update the expiration and confirm policy number is correct
- Liquor Liability – Remove if unnecessary (red font in requirements below)
- ☐ Send all COIs received to CU Risk Management: Chad Medina (medina@cu.edu) Carolyn Peet (peet@cu.edu)
- ☐ After COI is current, approved by Risk Management, and files updated, erase off critical date tickler

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 02/22/2012		
<p><small>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</small></p> <p><small>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</small></p>						
<b>PRODUCER</b> Name of Insurance Broker / Agent  Street Address City ST ZIP		<b>CONTACT</b> NAME: PHONE: No, Ext: FAX: (No) E-MAIL: ADDRESS: PRODUCER: CUSTOMER ID #:  INSURER(S) AFFORDING COVERAGE: NAIC # INSURER A: Name of Insurance Company INSURER B: Name of Insurance Company INSURER C: Name of Insurance Company INSURER D: INSURER E: INSURER F:				
<b>INSURED</b> Named Insured (Lease of Office Space)  Street Address City ST ZIP						
<b>COVERAGES      CERTIFICATE NUMBER:      REVISION NUMBER:</b>						
<p><small>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</small></p>						
INSR	TYPE OF INSURANCE	ADOL SUBR	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PBC <input type="checkbox"/> LOC	<input checked="" type="checkbox"/>	POLICY # HERE	MM/DD/YY	MM/DD/YY	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (EA accident) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPROP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	<input type="checkbox"/>	POLICY # HERE	MM/DD/YY	MM/DD/YY	COMBINED SINGLE LIMIT (EA accident) \$ 1,000,000 BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DEDUCTIBLE RETENTION \$	<input type="checkbox"/>		MM/DD/YY	MM/DD/YY	EACH OCCURRENCE \$ AGGREGATE \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N <small>(Mandatory in NH if yes, 3000/5000 USD or SPECIAL PROVISIONS below)</small>	N/A	POLICY # HERE	MM/DD/YY	MM/DD/YY	<input checked="" type="checkbox"/> W-STATS <input type="checkbox"/> OTH- <input type="checkbox"/> LOSS LIMITS <input type="checkbox"/> SR E.L. EACH ACCIDENT \$ 100,000 E.L. DISEASE - EA EMPLOYEE \$ 100,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required) The Regents of the University of Colorado, a Body Corporate, and its officers, employees, agents and volunteers are Additional insured as respects General Liability.						
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>		
University of Colorado Office of University Risk Management 1800 Grant Street, 7th Floor Denver CO 80203				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE		

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## Standard Lease Insurance Requirements

The following language is current approved insurance language as of 6.4.2020

### 1.1.

Tenant's Insurance. During the Term, Tenant will obtain and maintain at its own expense and for the duration of the Lease, insurance policies with the minimum insurance coverages set forth below in Article 9.2 with companies licensed or approved to do business within the State of Colorado and having an A.M. Best Rating that is acceptable to Landlord. All policies must be written on a per occurrence basis. By requiring such minimum insurance, Landlord shall not be deemed or construed to have assessed the risk that may be applicable to Tenant under this Lease. Tenant shall assess its own risks and if it deems appropriate and/or prudent, maintain higher limits and /or broader coverages. Neither Tenant nor its sub-contractors, under this Lease, are relieved of any liability or other obligations assumed or pursuant to the Lease by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types. Tenant and any persons employed by Tenant for the performance of work hereunder shall be independent contractors and not agents of the University of Colorado. Landlord reserves the right to negotiate additional insurance requirements.

### 1.2.

Coverages.

#### (a)

Commercial Property Insurance. Tenant agrees to carry insurance covering all of Tenant's leasehold improvements, alterations, additions, trade fixtures, merchandise and personal property from time to time in, on or upon the Premises, at least as broad as ISO Causes of Loss – Special Form Coverage and Equipment Breakdown Protection Coverage, including Flood and Earthquake, against risks of direct physical loss or damage (commonly known as "all risk" and "boiler and machinery") for the full replacement cost of Tenant's property located at the Premises, with a deductible amount not to exceed \$10,000.00. Any policy proceeds shall be used for the repair or replacement of the property damaged or destroyed unless this Lease shall cease and terminate due to destruction of the Premises as provided below. Leasehold improvements shall include all improvements above the concrete floor and below the concrete or steel roof deck and roof structure whether completed specifically for Tenant or existing prior to the Commencement Date and those tenant improvements made by Tenant or on Tenant's behalf by Landlord. It is understood and agreed that Tenant assumes all risk of damage to its own property arising from any cause whatsoever, including without limitation loss by theft or otherwise.

#### (b)

Commercial General Liability Insurance. Commercial general liability insurance on an ISO most current form or its equivalent, with the following coverages:

- (i) premises/operations;
- (ii) personal injury / advertising injury with employee and contractual exclusions removed;
- (ii) products and completed operations;
- (iv) liability assumed under an insured contract (including defense costs assumed under contract);

- (v) independent contractors;
- (vi) broad form contractual liability specifically in support of, but not limited to, the indemnification provisions contained in this Lease;
- (vii) broad form property damage; and
- (viii) a separation of insureds clause.

Each policy listed in this Article 9.2 (b) shall provide limits of not less than Two Million Dollars (\$2,000,000) for general aggregate, and products/completed operations aggregate, and not less than One Million Dollars (\$1,000,000) for each occurrence limit and fire damage (any one fire).

(c) Workers' Compensation Insurance. Workers' Compensation Insurance with the statutory limits and employer's liability insurance with limits of not less than Five Hundred Thousand Dollars (\$500,000) for each accident, One Million Dollars (\$1,000,000) for disease-policy limit, and Five Hundred Thousand Dollars (\$500,000) for disease--each employee. Policy must include (a) Other States endorsement to include Colorado if business is domiciled outside the State of Colorado, and (b) a waiver of all rights of subrogation in favor of Landlord.

(d) Automobile Liability Insurance. Automobile Liability Insurance covering all owned, non-owned or hired vehicles, with coverage for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage.

(e) Umbrella/Excess Liability Insurance. Umbrella/Excess Liability Insurance with limits of not less than Five Million Dollars (\$5,000,000) per occurrence and aggregate and (1) providing coverage in excess of the coverages of, and (2) "following form" subject to the same provisions as, the underlying policies required in Article 9.2 (a), (b), and (c) above.

All such insurance shall be carried in the name of Tenant. All of Tenant's insurance policies required by this Lease (i) shall be written on a primary basis, non-contributory with any other insurance coverages and/or self-insurance carried by the University of Colorado, and (ii) shall (with the exception of Worker's Compensation and Employer's Liability policies under Article 9.2(c)), at all times during the Term name The Regents of the University of Colorado, a body corporate and The University of Colorado (i) as loss-payees and additional named insureds to the full limits of insurance purchased, even if those limits exceed those required by this Lease, and (ii) as additional insureds, as respects to the general liability policy.

Tenant shall provide Landlord with a certificate of insurance evidencing all required coverages, before the Commencement Date. The certificate holder shall be: The Regents of the University of Colorado, a body corporate, 1800 Grant St., Suite 700, Denver, Colorado 80203. Upon Landlord's request Tenant must provide a copy of the actual insurance policy and/or required endorsement effecting coverage(s) required by this Lease. Tenant shall notify Landlord of any cancellation, or reduction in coverage or limits of any insurance within seven (7) days or receipt of insurer's notification to that effect. Failure of Tenant to fully comply with these requirements during the Term of this Lease may be considered a material breach of contract and may be cause for immediate termination of the Lease at the option of Landlord.

1.3.

Waiver of Subrogation. Landlord and Tenant (to the extent Tenant is authorized by the Constitution and laws of the State of Colorado) each agree that with respect to any third-party insurance policy maintained, or required to be maintained, by it under this Lease, such policy of insurance shall contain a waiver of the insurer's subrogation rights with respect to any amounts paid under such policy or policies. Landlord and Tenant each agree to (i) immediately give written notice to each insurance company that has issued to it, or in the future issues to it, policies of insurance with respect to this Lease; (ii) cause such insurance policies to be properly endorsed, as necessary, to evidence the waiver of the insurer's subrogation rights; and (iii) provide reasonable proof of such waiver of subrogation rights to the other party. Further, to the extent of insurance proceeds received, the parties respectively waive and release any and all claims against the other party for damages caused or contributed to by the other party.

1.4.

Indemnification. Tenant shall indemnify and hold Landlord Indemnified Parties harmless from and against any and all losses, costs (including reasonable attorney's fees), damages, liabilities and expenses (collectively, "Losses") incurred by the Landlord Indemnified Parties as a result of claims, demands, penalties or prosecutions, caused by, allegedly caused by or contributed to by the acts or omissions of Tenant, its employees or agents, and shall defend on behalf of the Landlord Indemnified Parties any suit brought against the Landlord Indemnified Parties for any such Loss and shall reimburse Landlord in connection therewith. Tenant agrees that the insurance requirements specified in this Lease do not reduce the liability Tenant has assumed in this Article 9.4.

***Also:***

**Host Liquor Liability – where applicable**

**\$1,000,000**

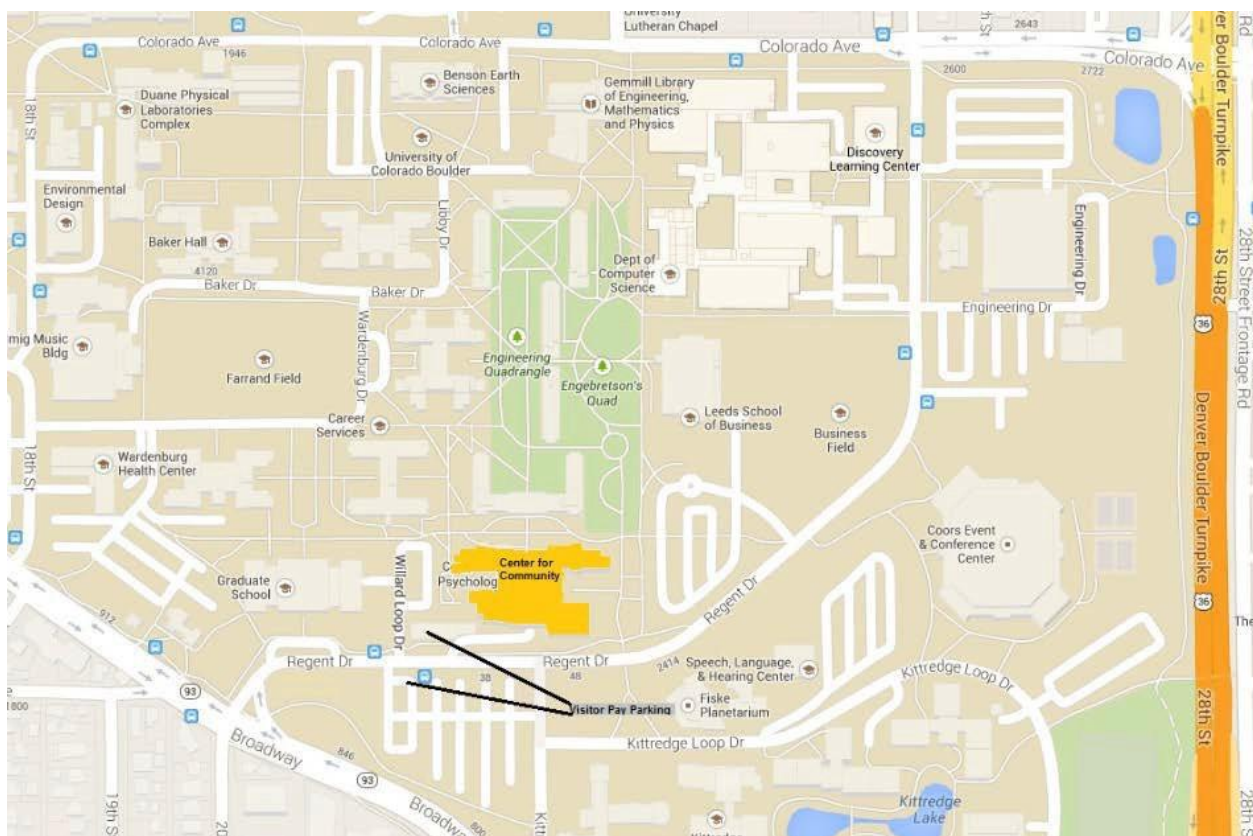
Where the Lessee will distribute alcoholic beverages on University leased premises, Host Liquor Liability insurance is required.

# New Outside Tenant Procedures

# New Outside Tenant Procedures

As an outside tenant (any group that is not affiliated with the University) the following must be completed upon executing a lease with Real Estate Services (RES):

1. Provide a COI (certificate of insurance) to RES. A COI that meets all lease requirements must be on file with RES before keys can be issued.
2. Provide BuffOne card numbers and expiration dates for everyone that needs access to the space to RES. If you or one of your colleagues that will be using the space does not already have a BuffOne card, notify RES and they will submit an application on your behalf. Once the application has been sent, the applicant will need to go to the BuffOne Card office, located in the Center for Community on main campus (see map below), and they will issue a Vendor/Contactor BuffOne Card. The cost for each new BuffOne card is \$5.00.



3. Once you provide your BuffOne card information to RES, they will order keys to the space and set-up afterhours building access. Vendor/Contactor BuffOne cards expire 12 months after they are issued and it can take up to 48 hours for building access to be activated on new Buff cards.
4. Keys can be picked up from RES or directly from Access Services at the stadium. Let RES know which option you prefer and they will make the appropriate arrangements.

5. Outside tenants are not allowed to use UCB internet/telephone connections. If you require telephone and/or internet service, you will need to contract with an internet service provider (ISP) in the area (CenturyLink, Comcast, etc.). Per your lease agreement, as the tenant you are responsible for all the ISP associated costs (installation, fees, etc.). Most outside tenants go with CenturyLink as all RES buildings already have the infrastructure in place that is compatible with CenturyLink's service and therefore the installation is much less expensive compared to other ISPs.
  - a. If the space you are leasing does not already have an Ethernet jack, one will need to be installed before the ISP comes out to install/activate service. To have a jack installed, contact RES and they will make arrangements to have a jack installed. New jack installations usually take at least 2 weeks to be completed from the time they are requested.
  - b. Once you have a confirmed the installation date/time with your ISP, contact RES and they will make arrangements to have a representative with the University IT department open the nearest telecom closet while the ISP tech is installing/activating your service.
6. If there are any issues with the space during your tenancy (heating/cooling not working properly, leaks, damages, lock issues, etc.), please contact RES immediately and they will work to resolve the issue as quickly as possible. RES can be reached by calling 303-492-6883 or by emailing [Sandra.Grover@colorado.edu](mailto:Sandra.Grover@colorado.edu).

# CU Mailer's Guide



# Mailer's Guide, Distribution Center

The CU-Boulder community of 30,000 students and more than 8,000 faculty and staff requires all the postal services of an ordinary community. In addition, CU needs many specialized services for handling the unique activities of university life.

Mailing Services consists of two different service operations: Distribution processes incoming mail for the campus, while Meterline processes outgoing first class, international mail, UPS, and FedEx.

Both service operations of Mailing Services are located at the Distribution Center (3300 Walnut St). Our mailing address for all services is 60 UCB.

Mailing Services processed approximately 2.5 million pieces of incoming mail last year and approximately 97,000 pieces of outgoing mail.

Mailing Services encourages interested parties to tour the department. To arrange a tour contact the manager of the particular service area that is of interest to you or 303-492-6242.

**Note: Significant updates have occurred with the COVID-19 virus; Updates include calling ahead, and picking up mail directly from Distribution at scheduled time. Once arriving you must call Distribution again, and let them know you are there, and which vehicle you are in. they will bring the mail to you/your vehicle. If you have mail that needs to be mailed through distribution, you must bring it to distribution, call them, and let them know you have mail to be dropped off. Please see the below site, and check back for updates as needed.**

<https://www.colorado.edu/fm/2020/03/12/distribution-center-mailpackage-service-update>

## Hours of Operation

Distribution Center Reception Office:

Monday through Friday, 7:30 A.M. to 5:00 P.M.

(Summer hours: 7:30 A.M. to 4:30 P.M.)

Meterline and Distribution teams:

Monday through Friday, 7:30 A.M. to 12:00 Noon and 1:00 P.M. to 4:30 P.M (year round)

## Stamps/USPS products

The UCB Mailing Services is not a post office and is not able to provide any USPS products or services to individuals on a cash-for-service basis (e.g. money orders, stamps, etc.). [Find your closest USPS office.](#)

## Mailing Supplies

The Mailing Services receptionist will provide university departments with supplies for preparation of their outgoing mail at no charge (rubber bands, return receipts, customs forms, mail trays, mail tubs, etc.). Contact 303-492-6242.

Packaging supplies (envelopes, address labels, tape, etc.) may be purchased from the CU Bookstore.

## USPS and University Policies

In accordance with the Private Express Statutes as interpreted by the Postal Service (regulations 39 C.F.R. parts 310 and 320), the campus mail service is for university business only.

- ❑ A. Letters must be sent by, and/or addressed to staff and faculty members in their official capacity as

representatives of UCB.

- ☐ B. Personal letters of staff, faculty, or students may not be carried within the campus mail system (i.e. advertisements of a house for sale/rent, personal Christmas cards, Credit Union statements, etc.)
- ☐ C. Outside businesses have very limited access to the campus mail system. While University departments may use the campus mail system for University business, departments may not serve as a conduit of mail for the letters of outside organizations or individuals.
- ☐ D. The University may carry letters of its bona fide affiliated student or faculty organizations to campus destinations. The restrictions outlined above apply.

Mail carriers are not permitted to pick up personal mail (i.e. bills, correspondence, etc.), for input into the U.S. Postal system. Departments and/or individuals must use the various U.S. Mail collection boxes located throughout campus for non-University business and/or personal mail.

### **University Policy**

All incoming and outgoing mail processed by the University must relate to the business of the University. Mailing Services may audit all campus mailings for content by visually inspecting a random sample from each mailing to ensure compliance with the relevant statutes and policies. Mailing Services Distribution Supervisor and/or Distribution Manager will be responsible for auditing campus mailings for compliance with these regulations.

- I. Mailing Services may not be used for commercial, personal or private gain or for commercial advertising for organizations or individuals not affiliated with the University.
- II. Mailing Services can only accept mailings that clearly demonstrate that the mailing is sponsored by the University of Colorado system. Acceptable mailings are written on University letterhead, have a University return address, or clearly and prominently state that the function is sponsored by a University department.
- III. Mailing Services operations may not be used in any manner to imply University endorsement of a partisan, political, sectarian, or religious position.
- IV. Mailing Services may not be used for fund raising, except as approved by the Vice Chancellor for Administration.
- V. The University may carry letters of its bona fide affiliated student or faculty organizations to campus destinations. The restrictions outlined in this policy apply.
- VI. Outside businesses are not generally allowed access to the Campus mail system.

A. While University departments may use the Campus mail system for University business, departments may not serve as a conduit for mail for the letters of outside organizations or individuals unless the material relates to the business of the University.

B. Material generated off-campus must include a cover letter on University letterhead, stating that the mailing is sponsored by a University department.

### **Billing Information**

All charges appear in batch "MSS01" and reference "JE00055". All postage charges appear in code 565; all Mailing Services labor charges appear in code 567. All charges are fully listed on the Peoplesoft statement with the tracking number and the IN number if one was received. Departments are required to control the sending of mail and which speed type is used. An online system to look at Mailing Services Billing is in the construction stage and is projected to be

available by July 2007.

### **Zip Codes**

The ZIP Code for Boulder campus departmental offices is 80309 plus the appropriate four-digit ZIP Code "add-on." The four-digit add-on is your departmental campus box number, plus the appropriate number of zeros to total four digits. For example:

Board of Regents = 80309-0003

Mailing Services = 80309-0060

Human Resources = 80309-0565

The ZIP code for Boulder campus residence halls is 80310.

### **Private Carriers**

Mailing Services accepts and delivers USPS mail only. Private carriers, such as United Parcel Service (UPS), Federal Express, Airborne, and Pony Express deliver directly to the departments.

### **Campus Addresses**

A campus box number assignment corresponds to a particular delivery route/location on campus. It determines how effectively your mail processes from receipt to delivery. This includes where your mail is sorted, who is sorting your mail, where your mail is queued for the route, and the order of delivery. UCB campus box numbers are maintained and assigned by the Mailing Services General Manager or Distribution Supervisor. If a department changes location such that the new location is on a different delivery route, the campus box number may be changed. Relocation's may also require us to change our delivery routes to accommodate the move. Contact the Distribution Supervisor at 2-2444 as soon as possible when departmental moves are planned to prepare for the change if one is required.

If a change in box number is necessary, Mailing Services maintains a one-year grace period on the old box number to allow time for the department to notify correspondents, change letterhead, etc. Mail addressed to an old box number is forwarded to the new box number assignment during this time.

If your department is planning to move on a regular basis or will be re-locating to an off-campus location, other arrangements may be made for you to receive your mail.

Mailing Services evaluates requests for new box numbers solely from the standpoint of mail volume and geographical location. Due to the steady increase in mail volume and growth of departments, combined with our fixed physical resources, Mailing Services is forced to centralize mail stops and box numbers as much as possible. Contact the Distribution Supervisor for further details at X2-2444.

## How to Address Mail

Incoming mail to on-campus departments must bear the correct name, department and campus box number on each piece. The correct address formats are as follows:

mailing address main campus	mailing address east campus	intra-campus address
Jane Doe	Jane Doe	Jane Doe
English Department	Payroll and Benefits	English Department
University of Colorado	3100 Marine Street, 3rd Floor	226 UCB
226 UCB	565 UCB	
Boulder, CO 80309-0226	Boulder, Colorado 80309-0565	

The Campus Box number system of the University has been entered into the US Postal National Address Database as the "Delivery Address". It is therefore imperative that the line immediately above the "City, State, ZIP" line contain only your box number with no leading zeros and campus code (your Campus Box number). This will ensure that routing of incoming mail pieces through the postal equipment is correct.

For further information on postal automation and addressing standards, please refer to the section on "Addressing Standards." A listing of all campus box numbers is located in the front of the Boulder Campus Directory under "Campus Mailing Addresses" and or by contacting the Distribution Manager.

### Mis-delivered Mail

If a bundle of mail or a package is delivered to your department in error, please promptly report the error to Mailing Services so it can be quickly corrected.

### Intra-campus Mailings Over 50 Pieces

A department invoice (IN) is required for all campus mailings 50 pieces or over. Mailing Services audits mailings for compliance with the USPS. Private Express Statutes and University policy and assesses a sorting/delivery charge. All mailings should be prepared in campus box number order to avoid the higher "campus delivery" rate.

### Non-mail Items

Mailing Services was established to deliver, pick up, and process interdepartmental correspondence, mailings, and items to be mailed through our Meterline Services. Non-mail items requiring general campus transport, such as boxes of computer paper, books, seminar materials, office supplies, shipments from private couriers, etc. or mailings involving more than 2,000 pounds of materials fall outside the scope and resources of this department. Requests for such services should contact Moving and Hauling, at Property Services. In addition, the Distribution Center stocks and delivers many types of supplies.

## Reusable Envelopes

Mailing Services encourages the use of reusable envelopes for use on campus. Despite our efforts to keep the campus supplied with these envelopes, the demand is greater than our supply. We request that any department that have an excess supply of reusable envelopes to send them to Mailing Services so that they may be reused. If you have a large quantity of reusable envelopes to return to Mailing Services, please call in a package pick-up. Please label your bundle "empty envelopes for reuse" and be sure that all envelopes are empty before returning them to Mailing Services.

## Receipt of Express, Registered, Certified, and Insured Mail

"USPS accountable mail" is defined as "articles sent registered, certified, insured, and express which require a signature upon receipt as proof of delivery." Mailing Services receives this mail from the USPS between 9:00 and 10:00 AM, Monday through Friday with the exception of Holidays. The Distribution Supervisor verifies and signs for each piece from the USPS and then creates a manifest of this mail for departmental signatures to complete the audit trail. Distribution delivers this mail on a separate delivery route between 10:00 AM and 3:00 P.M. The addressee or a responsible person at the addressee's department must sign for these articles when campus carriers attempt delivery. If the carrier cannot obtain a signature for the article, the article will be returned to Mailing Services and a notice of its arrival will be mailed to the addressee. The articles can either be picked up at the Distribution Center (3300 Walnut) or re-delivery may be requested for the next day, provided there will be someone available to sign for the article.

If the USPS receives additional Express mail for the University during the day, they will make a special trip to Mailing Services. Normally a Periodical delivery arrives around 3:00 P.M. Mailing Services will call the department upon receipt. The department may come to Mailing Services to pick up the piece, or have it delivered the following morning on the regular accountables route.

If a department needs to know if a particular piece of express mail has arrived, or pick it up ASAP, please contact Mailing Services at x2-6242. We will contact you by phone as soon as possible and make the piece available for pick up. For an additional charge, the department may request an "Express Services" delivery, and the piece will then be delivered to the department within one hour.

## Preparation of Outgoing Mail

The mail from each stop on each route is merged with the other departments on the route. To ensure same day processing, outgoing mail must be separated into:

- 1) Campus mail
- 2) Mail to be metered (separate international)
- 3) Stamped mail and business reply

Each bundle must be securely rubber-banded, so that mail for each department and/or account number is not separated. The bundle is directed to the appropriate service area upon the return to Mailing Services. Loose mail is more likely to be delayed as well as damaged (bent, crushed) when merged with hundreds of other pieces along the route. **All mail sent off campus must have a University return address.**

Rubber bands are available through Mailing Services for bundling mail at no cost. Please contact our receptionist at x2-6242 if you need rubber bands.

## Package Pick-up Requests

Distribution package carriers pick up packages or large quantities of mail from departments for processing by Mailing Services that the letter carriers are not able to pick up on their walking routes. [To schedule a pickup of this type of mail,](#)

[please click on this link to go to the Package Pickup Request form.](#) This mail should be placed for pick up in the normal carrier stop in the department. For same-day service, requests must be called in to Mailing Services by 8:30 AM for departments, which normally receive their package mail in the mornings, and by 12:00 Noon for departments receiving their package mail in the afternoon.

When scheduling a package pickup, you will receive a package pickup number. Place this number on each package, bundle, or tray being picked-up. Loose mail will not be picked-up; box or bundle items to prevent loss and/or damage.

Mailing Services may spread out package pick-ups of 5 or more packages or boxes over two or more days (depending on the quantity) in order to maintain the daily campus delivery/pick up schedules.

Same-day pick up of large quantities of mail, emergency/immediate pickups, and pickups in locations other than the standard mail stop in the department depend on the availability of our resources (personnel/vehicles). A prorated labor charge may be assessed to the department for such pickups.

To schedule a large mailing with the Supervisor of the Meterline call (2-2443) prior to calling for a package pickup.

Equipment: A damage waiver must be signed for equipment such as computers being picked up for shipment through Mailing Services Meterline Services. Please identify such items when requesting a package pickup.

Hazardous Materials: There are strict rules for shipping hazardous materials. All hazardous materials will ship through the Distribution Center rather than Mailing Services. Please contact Materiel Management at the Distribution Center for further information.

### **Boulder-Denver Shuttle**

Distribution operates the Boulder-Denver Shuttle Service on a daily schedule, Monday through Friday. Regular daily stops are made to the State Services Building, the UCD Campus (currently being distributed through Auraria Business Services), and the Health Sciences Center.

Mail for the Boulder-Denver Shuttle received at Mailing Service before 12:00 Noon will be delivered that same afternoon to the various stops along the route.

Mail destined for delivery on the Shuttle must carry the correct department name, delivery address, and city of destination. To expedite handling of items, the words "DENVER SHUTTLE" should be placed on each piece, bundle, or package to be delivered from Boulder to Denver. Likewise, correspondents should write "BOULDER SHUTTLE" on all mail sent from Denver to Boulder.

As with UCB mail service, the Shuttle service is for the transfer of University correspondence rather than non-correspondence items such as boxes of materials, paper, goods, etc. However, Mailing Services will try to accommodate boxes when space allows. The limited capacity of the vehicle, combined with the varying quantities of mail to be picked up or delivered at each stop prevent any guarantee of delivery of non-correspondence items.

### **Express Service**

Express Service is an on-call service designed to move small non-mail items and time sensitive correspondence to destinations on the Boulder campus or within Boulder city limits. The targeted turnaround time for this service is 1 ½ hour. Mailing Services can handle most items through Messenger Service; however, large equipment or large quantities of items should be referred to Moving and Hauling at Property Services. They can be reached at 2-6524.

The current cost of Messenger Service is \$15.00 per delivery stop. If a department has items going to different destinations, \$15.00 will be assessed for the first delivery stop and \$10.00 for each additional delivery stop. Departmental speedtypes will be taken with the order over the phone for billing.

This service is offered 8:00 A.M. to 11:00 and 1:00 P.M. to 3:30 P.M. weekdays. After you have requested this service, our receptionist will request the following information: account number to be billed, contact person/department/building/ room number and phone number for pickup, and the same information for delivery.

The item for delivery should be packaged, addressed and ready for delivery at the time the call is made. If requested, proof of delivery will be obtained when the item is delivered; therefore, the recipient or a departmental representative must be available to sign for the item at the time of delivery.

### **Campus Certified Mail**

Due to the volume of mail received and processed each day, it is not possible to trace missing mail unless the pieces have been sent in "accountable" form. Campus certified service is available to provide proof of delivery for important items. Campus certified mail is handled similarly to USPS certified mail within the campus mail system.

There is a nominal fee per piece for this service. When your department wishes to send a campus certified through the campus mail system, please complete a campus certified form and retain the top copy for your records. The bottom two copies should be attached to the article. Please deliver the article to Mailing Services at 3300 Walnut St. so that the article can be properly logged in. Campus Certified mail can be placed in your outgoing mail for pickup by Mailing Services. It would be best to separate them so they don't get mixed with other outgoing mail. Campus certified forms are available by calling our receptionist (2-6242). Please note that for same-day delivery of campus certified mail to be delivered on the Boulder-Denver Shuttle, the campus certified must be received by Mailing Services at 3300 Walnut St. by 11:45 A.M. to allow sufficient processing time.

### **Insufficient Address/Forwarding**

Incoming USPS and intra-campus mail that has an insufficient address (undeliverable) will be delayed. We regularly receive campus mail with only a name (sometimes only a first name!) to work with. To avoid delays or returns, it is imperative to inform your correspondents of your correct and complete address.

Mailing Services uses the latest monthly Payroll database listing of personnel to determine the proper mailing address. This same listing is used to correct mailing lists. It is important that your PAF reflect the correct information.

Misaddressed Periodical and Standard (non-profit) bulk mailings are treated in accordance with the U.S. Postal policies:

Periodicals (normally a publication such as a magazine) which are insufficiently addressed are sent through to the addressee after the correct mailing address has been determined.

Standard (non-profit) bulk mail consists of circulars, printed matter, newsletters, catalogues, and the like. If the minimum addressing requirement for this class of mail is not met, the piece will be recycled unless an endorsement for "address correction requested" is specified on the piece. In this instance, the piece will be returned to sender with the address correction.

### **Change of Address**

Mailing Services provides change of address cards for departments to correct mailing addresses or delete unwanted correspondence. The department must complete the card and return it to Mailing Services. Mailing Services will pay for the postage on all business related change of address cards.

It is the responsibility of the individual departments to forward all mail addressed to former staff and faculty members, as the U.S. Postal Service and Mailing Services does not maintain change of address files for the University.

## **Meterline Services**

*--Preparation of mail to be metered--*

### **Speed types**

Use of a departmental IN (Invoice) is optional for processing First Class daily mail. If an IN is not used, the speed type should be written in the upper left hand corner of the individual piece or on the top piece of each bundle. Any individual piece or bundle of outgoing daily business mail requiring postage must have valid speed type included. The speed type on a piece or bundle authorizes Mailing Services to post that mail and recharge the department. Mail without a speed type will be delayed, and could be returned to the department. Avoid any writing in the upper right hand corner of the envelope, or along the bottom of the envelope 5/8" from the bottom.

### **Departmental/ Mailing Services Invoices**

An invoice (IN) is required for any USPS special services (i.e. registered, express, certified, or insured mail) and all UPS or FedEx services. In addition, all INs for UPS or Federal Express shipments must include the street address of the recipient. This information serves as a tracking record for your parcels. Please be specific as to the service requested. IN's will not be processed without an authorizing signature and a valid account number.

### **University of Colorado department return address**

A CU return address must appear on each piece of mail to be sent off campus. This policy is to ensure compliance with the Colorado Revised Statutes 24-30-1111 regarding the penalty for private use of State installed postage meters.

### **Foreign Mail**

Foreign mail should be separated from Domestic Mail and clearly identified to ensure that it will be processed with the correct postage. All foreign addresses must have the destination country spelled out in full (no abbreviations). Any USPS, UPS or FedEx packages being shipped to a foreign destination that have a commercial value or over 1 lb., must include a description of contents and value for customs. This includes packages sent to APO addresses. Failure to include this information may result in a delay in shipping the package.

### **Default classes for processing mail**

Unmarked domestic mail will automatically be processed at the first class rate. To avoid paying higher postage rates than necessary, consider lower rates such as media or library mail and mark the desired rate on the mailing piece. If it is necessary to have the same day post mark on your mail, put a note on the piece or bundle, stating "Today's post mark required."

Unmarked Foreign mail will automatically be processed at the air letter class or air parcel post class if over 4 lbs. To avoid paying higher rates than necessary, consider economy letter post or economy parcel post rates, and mark your package accordingly.

### **Call ahead for larger mailings**

If you have a mailing larger than 2000 letters or 500 flats, notify the Meterline at 2-2443 one day in advance, to guarantee timely processing. Unscheduled mailings will be processed the same day only if time permits.



## Information or Supplies

If you would like information on rates, the best way to ship packages, or to order USPS or FedEx supplies, call the Meterline at 2-2443 or 2-2445.

More information about fees and classes of services:

US Postal Service

UPS

Fedex

--Labor charges--

Labor charges may be assessed for mail to be metered that requires additional preparation or handling. Mailings that may be assessed these charges are listed as follows:

- A. Envelopes that cannot be sealed at the same time that they are metered, (flaps that are perpendicular to the address) may be assessed a hand seal or machine seal charge for over 50 pieces. Please note that clasp envelopes cannot be run through the meter machines without damaging the equipment.
- B. Mailings over 50 pieces that have a permit number that has to be blocked out, or that require a meter tape, may be assessed an additional handling fee.
- C. If you have 10 or more pieces of special services (i.e. Certified, Registered, Express) for processing, a labor charge may be assessed. If return receipts are requested, labor charges will be reduced if you fill out the return receipts prior to submitting the mailing to the Meterline. Please contact Mailing Services if you need a supply of return receipts.
- D. If you have more than 10 foreign packages that require customs forms, you may be assessed a handling fee for filling out the required forms. To avoid this fee, call Mailing Services for a supply of customs forms.
- E. Mail requiring extra labor or preparation will be processed last, and may not go out the same day it is received.

## Schedules/Deadlines

If you miss the regular scheduled pick up at your department, mail can be dropped off at the Mailing Services Office at 3300 Walnut Street, Boulder, CO. Outgoing mail to be metered and UPS or FedEx mail to be processed by the Meterline must be at Mailing Services before 3:00 P.M. for same-day posting and delivery. Special emergency or rush requests after 3:00 P.M. will be considered if time and volume permit.

Currently, our post office mail is shipped to the Boulder Post Office at 3:45 P.M., Monday through Friday.

UPS and Federal Express pick up from Mailing Services by 3.45 P.M. Monday through Friday. **Mailing Services does not have accounts with DHL, Airborne Express or FedEx ground, so we can only accept pre-printed authorized return shipments for these vendors.**

**Block recharge on account numbers:** Departments can flag account numbers through Mailing Services so that they are not recharged for daily mail to be metered. To flag an account number, send a memo to the Mailing Services accountant at 60 UCB. This flag affects daily mail only and does not affect transactions requested on an IN.

### **State Law - Meters**

A special add plate reading "State of Colorado Official Mail, Penalty for Private Use" is required for each meter machine on campus. Violations of this policy can result in the loss of meter privileges. Any person who uses a state-installed meter for private purposes commits a Class-3 misdemeanor and shall be punished as provided in Section HB1170, LDO 83-0038/1, 1093 (up to \$750.00 fine/6 months imprisonment).

### **Business Reply Mail**

Business Reply Mail (BRM) enables a department to provide its correspondents with return reply envelopes or cards which the correspondent can return without paying postage. The BRM permit holder (UCB Mailing Services) is then assessed the regular first-class rate plus a BRM handling fee on each piece that is returned. Pre-printed BRM envelopes and cards are used mostly on this campus for return of information requested or questionnaires. The advantage of BRM is that the department pays postage and fees only on the replies which are returned.

Permit #165 is currently approved for the BRMAS (Business Reply Mail Accounting Service) program. Approval requires at least 98% of the incoming UCB permit #165 BRM pieces conform to USPS automation specifications. This program reduces the BRM handling fee.

Departments wishing to use permit #165 for BRM envelopes and cards must have approval for the card or envelope from Imaging Services prior to printing. Departments wishing to use old BRM card or envelope stock also need to have the BRM stock reviewed. The Postal Service will create and provide UCB with the BRMAS template that is needed at no charge. BRM pieces that are printed incorrectly jeopardize the 7 cent per piece BRMAS discount for the rest of the campus. Departments printing off-campus or using materials that do not meet USPS specifications may not use permit account #165.

### **BRM Processing through Mailing Services**

BRM arrives daily from the USPS. Mailing Services will recharge all postage and fees billed to the University to the individual departments. The department should have a valid account number pre-printed on the BRM envelope or card. If the account number printed on your BRM piece is not current, please contact Jeremy Pine at 2-2206 to update the account number. Mailing Services sorts all BRM pieces according to the account number printed on them, bundled, date-stamped and returned to the department with the quantity of pieces indicated on the bundle. There is normally a 24-hour turnaround from the receipt of the BRM pieces by Mailing Services to delivery of the pieces to the department. However, if the amount charged to our account by the Post Office does not correspond to the amount to an additional day delay may occur while the billing issue can be resolved.

### **Courtesy Reply Mail**

Courtesy reply provides the sender with a pre-printed card or envelope to return, but does not provide the postage. The mailer must put the appropriate postage on the return piece. To expedite the return of this mail through the automated equipment of the Postal Service, templates are available to pre-print the appropriate FIMs and barcode on the return piece.

### **Address correction/Return Services**

Ancillary Services are provided by the USPS for mail endorsed "Address Correction Requested," and/or "Return Postage Guaranteed." These services provide for a correct mailing address and/or return of the mail piece for mail undeliverable

as addressed. Fees charged to the University by the USPS for these services requested by the mailer are recharged to the individual departments. As of November 1988, the USPS implemented new requirements for mailers who use endorsements to request address correction and return service. In essence, the approved placement, size, abbreviation, and clear space are standardized. If the mail does not match the updated standards it will be rejected by the USPS.

### **Addressing Standards**

The USPS standards for addressing have changed to accommodate the high-speed automated equipment used in post offices nationwide. This equipment includes optical character readers (OCRs) and bar code sorters (BCSs), programmed to "read" and sort up to 10 pieces per Periodical. To ensure proper delivery of outgoing mail, decrease processing/delivery time and take advantage of postage discounts, mail must be "machineable" (right size and shape to go through equipment) and electronically "readable". Following are the general format and address rules to follow:

- \* Use white or light-colored envelopes, and type (no script) the address in black ink. The OCRs cannot recognize or read an address block if there is not enough contrast between the background color of the envelope and the ink used to type the address. Avoid using red or green envelopes, as the OCR cannot "read" the piece.
- \* Center the address on the envelope.
- \* Format all lines of the address with a uniform left margin.
- \* The typewriter or printer used should leave a clear space between each character. If any characters in the address touch each other, the OCR cannot tell where one ends and another one begins.
- \* Do not use any punctuation in the address, except for the hyphen in the ZIP + 4 Code. Place one full character space between words and between the state abbreviation and ZIP Code.
- \* Do not place any printing below the city/state/ZIP Code line. Place any "attention" line above the firm name.
- \* Make sure city/state/ZIP Code line is at least one inch above the bottom edge of the envelope.
- \* The address should be parallel to the bottom edge of the envelope, not slanted.
- \* In the last line of the address, spell out the city name in its entirety and use the appropriate two-character state abbreviation.
- \* The line immediately above the city/state/ZIP Code should indicate where you want the piece delivered. This is important if both the street address and post office box number must be used in the address block. (This process called "dual addressing" should be avoided whenever possible.)
- \* Use ZIP + 4 codes whenever possible.
- \* The address must be clearly visible in windowed envelopes, even when inserts shift.

Mail that is unreadable by the USPS equipment, it is routed to a letter sorting machine where the information is manually keyed in. This will cause a delay of about a day in the routing of the piece of mail.

## State Abbreviations

Alabama AL  
Alaska AK  
Arizona AZ  
Arkansas AR  
California CA  
Colorado CO  
Connecticut CT  
Delaware DE  
District of Columbia DC  
Florida FL  
Georgia GA  
Guam GU  
Hawaii HI  
Idaho ID  
Illinois IL  
Indiana IN  
Iowa IA  
Kansas KS  
Kentucky KY  
Louisiana LA  
Maine ME  
Massachusetts MA  
Michigan MI  
Minnesota MN  
Mississippi MS  
Missouri MO  
Montana MT  
Nebraska NE  
Nevada NV  
New Hampshire NH  
New Jersey NJ  
New Mexico NM  
New York NY  
North Carolina NC  
North Dakota ND  
Ohio OH  
Oklahoma OK  
Pennsylvania PA  
Puerto Rico PR  
Rhode Island RI  
South Carolina SC  
South Dakota SD  
Tennessee TN  
Texas TX  
Utah UT  
Vermont VT  
Virginia VA  
Virgin Islands VI  
Washington WA  
Wisconsin WI  
Wyoming WY

# Surplus Property Disposal

## Property Services - Surplus Property Definitions

The definitions below are intended to assist campus departments with their disposal of surplus property. (Revised 4/22/2014)

### Definition

### Who to Contact

<p><b><u>Surplus Property*</u></b>:</p> <ul style="list-style-type: none"> <li>• All electronics** (anything that plugs into anything else or operates on batteries): Computers, laptops, webcams, speakers, palm pilots, mice/keyboards, monitors, faxes, printers, etc.</li> <li>• Media such as hard drives, floppy discs, CDs, tapes, etc.</li> <li>• All furniture and lab equipment</li> <li>• Broken metal frame items (chairs, file cabinets) from which scrap metal can be salvaged &amp; recycled.</li> <li>• Wooden pallets or shipping crates in re-usable condition</li> </ul>	<p>Submit a surplus disposal request to <b>Property Services</b> (online, via department liaison) <b>492-6524</b>.</p> <p>* All items with a <b>CU TAG</b> must be listed in the appropriate box in the disposal request.</p> <p>**Individual <b>SERIAL NUMBERS</b> must be included in the disposal request for all electronics items. (<i>serial numbers not necessary</i> for mice, keyboards, sound or video cards).</p> <p><b>Material Management, 492-6369</b></p>
<p><b><u>Recyclable Waste:</u></b></p> <ul style="list-style-type: none"> <li>• Broken wooden pallets</li> <li>• Toner cartridges</li> <li>• Scrap metal</li> <li>• Cardboard boxes</li> <li>• Compact Fluorescent Lamps (CFLs) and mercury containing bulbs</li> <li>• Rechargeable/Alkaline Batteries</li> <li>• Cell phones, MP3s/IPODs and chargers</li> </ul>	<p><b>CU Recycling, 492-5321</b></p> <p>Submit Waste Tags to <b>EH&amp;S and Facilities Management, 492-7845</b></p> <p><a href="http://www.colorado.edu/ehs/programs/links.html">http://www.colorado.edu/ehs/programs/links.html</a> or <b>492-7845</b> for drop-off locations</p> <p>Drop off at the <b>UMC, Norlin Library, Darley Commons, or campus mail to 207 UCB</b></p>
<p><b><u>Construction Waste:</u></b></p> <ul style="list-style-type: none"> <li>• Construction materials such as lumber, carpet pieces, ceiling tiles, floor tiles, etc.</li> </ul>	<p>Construction Waste is the responsibility of the contractor and should never be abandoned at the work site nor placed in CU dumpsters. Please work with your project manager for issues relating to construction waste.</p> <p><b>Planning, Design &amp; Construction, 492-5511</b></p>
<p><b><u>Re-usable Office Supplies:</u></b></p> <ul style="list-style-type: none"> <li>• Staplers, tape dispenser, scissors, 3-ring binders, etc.</li> </ul>	<p><b>Environmental Center, 492-8308</b></p>
<p><b><u>Trash:</u></b></p> <ul style="list-style-type: none"> <li>• Broken wooden furniture (treated wood cannot be recycled)</li> <li>• Styrofoam</li> <li>• Discarded office items such as protractors, dishware, etc.</li> </ul>	<p>Campus departments can place these items directly into CU dumpsters.</p>

**Surplus Management  
System (SMS) Guide  
for:**

**University of  
Colorado Boulder**



Updated 8/2016

AssetWORKS

## Logging into the system

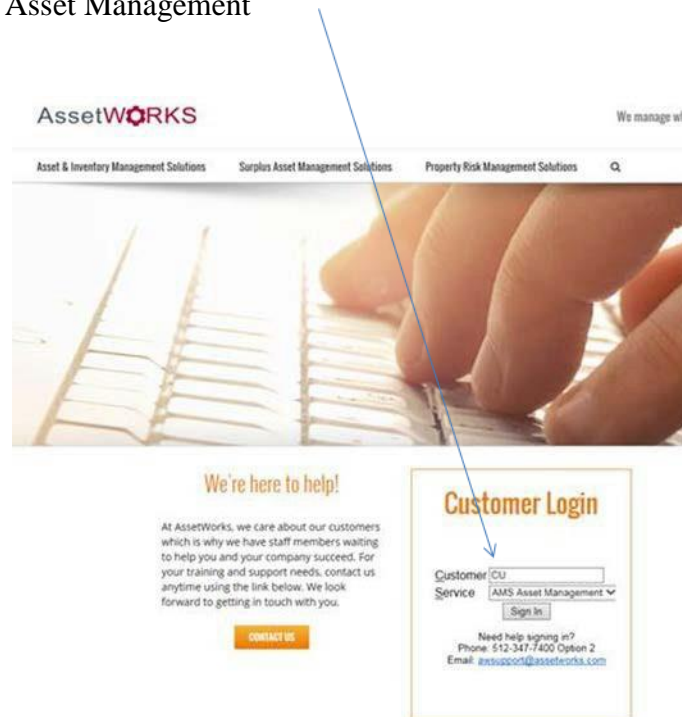
First time users:

Please log into the Surplus Property Management System site using this link:

<http://www.assetworks.com/login/>

The Customer is: CU

The Service is: AMS Asset Management



For users who have already accessed the system, you may use the direct link:

<http://ams5.incircuit.com/eams3/f?p=1055:101>

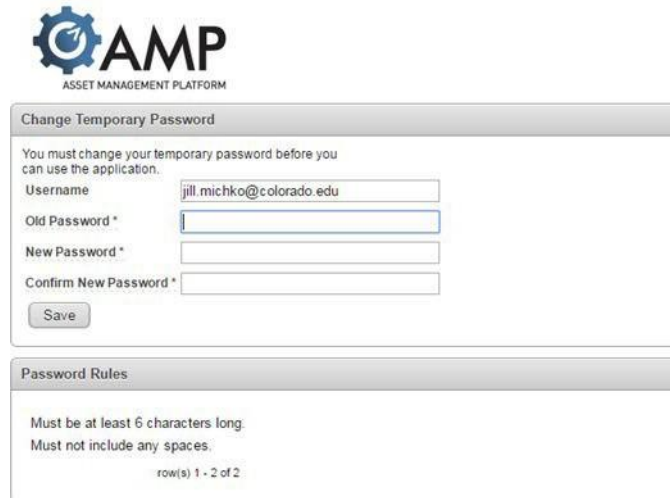
After pressing “Sign In” you will be taken to the login screen where you will use your usual login details.

The screenshot shows the AMP (Asset Management Platform) Sign-In screen. At the top, there is a logo consisting of a gear icon and the text 'AMP ASSET MANAGEMENT PLATFORM'. Below the logo is a 'Sign-In' form. The form has two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'a.Michko@colorado.edu'. The 'Password' field is masked with dots. Below the password field is a 'Sign In' button. At the bottom of the form, there is a link that says 'Forgot your username or password?'.

Your log in will be your University e-mail address i.e. [Jilliandra.Michko@colorado.edu](mailto:Jilliandra.Michko@colorado.edu) and you will be given a default password.

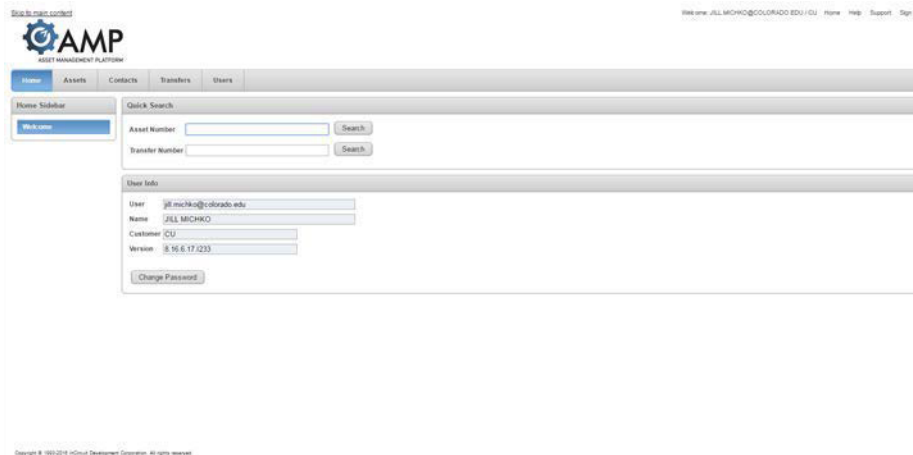


Upon logging in, you should be prompted to change your password.



The screenshot shows the AMP logo at the top, followed by a form titled "Change Temporary Password". The form contains a message: "You must change your temporary password before you can use the application." Below this are four input fields: "Username" (pre-filled with "jill.michko@colorado.edu"), "Old Password \*", "New Password \*", and "Confirm New Password \*". A "Save" button is located below the "Confirm New Password" field. Below the form is a "Password Rules" section with two rules: "Must be at least 6 characters long" and "Must not include any spaces." At the bottom of the rules section, it says "row(s) 1 - 2 of 2".

Users are, then, taken to the Welcome Screen.



The screenshot shows the AMP logo at the top left. In the top right corner, there is a user profile link: "Welcome JILL.MICHKO@COLORADO.EDU / DU Home Help Support Sign Out". Below the logo is a navigation bar with "Home", "Assets", "Contacts", "Transfers", and "Users". A "Home Sidebar" is on the left with "Welcome" selected. The main content area has a "Quick Search" section with "Asset Number" and "Transfer Number" input fields and "Search" buttons. Below that is a "User Info" section with fields for "User" (jill.michko@colorado.edu), "Name" (JILL MICHKO), "Customer" (CU), and "Version" (3.56.6.17.023). A "Change Password" button is at the bottom of the "User Info" section. At the very bottom of the page, there is a small copyright notice: "Copyright © 2012-14 iCloud Development Corporation. All rights reserved."

**The top, right corner of the screen contains the following links: Home**

- returns you to this main welcome page

**Help** - opens a window with additional help about the current screen

**Support** - opens a window that allows you to send a message or question to technical support staff.

**Sign Out** - signs you out of the application when you are finished

## Surplus Transfers (Transfers Tab)

When using the system, you will ALWAYS want to start at the Transfers Tab. This is where you will be creating and researching all Surplus Transfers.

### Quick Search Transfers

To quickly search for an existing surplus transfer by its Surplus Number, enter a Surplus Number into the field and press the Enter key or click the Search button

### Search Surplus

To perform a more advanced search of existing surplus transfers, click the arrow icon on the Search Surplus region. This will open up the region and allow you to specify additional criteria.

To search for your Surplus Transfers:

1. Log in to AssetWorks
2. Click on the Transfers tab at the top.
3. Expand the “Search Surplus” section by clicking on the plus sign to the left of “Search Surplus”
4. Enter the name or number of your department and select it when it comes up in your choices
5. In the “Status” field, select the blank option from the drop down menu so that it doesn’t say “waiting for receipt”.
6. Click on the “Search” button at the bottom of the section.
7. You should be able to see the Surplus Transfers that you created.

To view each individual transfer, click on the pencil and paper icon to the left of the Surplus Number.

The left screenshot shows the 'Search Surplus' form with the following fields and values:

- Surplus Number: (empty)
- Search: (button)
- Search Surplus: (plus icon)
- Surplus Number: (input field)
- From Department: Computer
- Method: 10344 - COMPUTER SCIENCE
- Status: (dropdown menu)
- Remarks: (text area)
- Creation Date From: (calendar icon)
- Creation Date To: (calendar icon)
- From Person: (dropdown menu)
- Submit For Approval Date From: (calendar icon)
- Submit For Approval Date To: (calendar icon)
- Close Out Date From: (calendar icon)
- Close Out Date To: (calendar icon)
- Search: (button)
- Adhoc Search Surplus: (plus icon)
- Create Surplus: (plus icon)

The right screenshot shows the 'Search Results' table with the following data:

Surplus Number	Creation Date	From Department	From Person	Method
17301	06/17/2016	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
17047	05/17/2016	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
18986	05/04/2016	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
19539	03/01/2016	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
18200	12/02/2015	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
18135	12/02/2015	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
19397	11/02/2015	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus
15848	11/02/2015	10344 - COMPUTER SCIENCE	ASHLY WILKINGHAM	State Surplus
15820	11/02/2015	10344 - COMPUTER SCIENCE	ASHLY WILKINGHAM	State Surplus
15852	11/02/2015	10344 - COMPUTER SCIENCE	ASHLY WILKINGHAM	State Surplus
15849	11/02/2015	10344 - COMPUTER SCIENCE	ASHLY WILKINGHAM	State Surplus
15850	11/02/2015	10344 - COMPUTER SCIENCE	ASHLY WILKINGHAM	State Surplus
15822	11/02/2015	10344 - COMPUTER SCIENCE	JOHN KELLY	State Surplus

## Creating a Surplus

To initiate a new surplus transfer of one or more assets, click the arrow icon in the Create Surplus region, enter the header information relevant to the transfer, then click the Create button. This will create the transfer header and then take you a new screen where you specify the assets you are placing onto the transfer.

The screenshot shows a web application interface with a navigation bar containing 'Contacts', 'Transfers' (selected), and 'Users'. Below the navigation bar is a 'Quick Search Surplus' section with a text input for 'Surplus Number' and a 'Search' button. Underneath are three expandable sections: 'Search Surplus', 'Adhoc Search Surplus', and 'Create Surplus' (which is expanded). The 'Create Surplus' section contains the following fields: 'From Department \*' (with '10344 - COMPUTER SCIENCE' and a magnifying glass icon), 'Notes', a separator '-- Contact Information --', 'Debit Speed Type \*' (with a magnifying glass icon), 'Building \*' (with a magnifying glass icon), 'Room \*', 'Contact Name \*' (with 'JILL MICHKO'), 'Contact Phone \*' (with '(303) 492-6324'), 'Contact Email \*' (with 'JILL.MICHKO@COLORADO.EDU'), 'Campus Box \*', and 'Location Notes'. A 'Create' button is located at the bottom of the form.

Enter at a minimum the required fields in the Create Surplus region:

Required fields have an \* next to them.

**From Department\*:** Users enter the From Department. Note this will default if you are setup with access/scope to only one Department. If you have multiple, you will have to use the lookup option by typing in the name or clicking on the magnifying glass.

**Notes:** Enter any notes into this field.

**Debit Speed Type\*:** Enter the Speed Type associated with the department.

Note: We don't normally charge for surplus property pickups, unless we need to recycle a refrigerator. Property Services needs to cover the cost for freon reclamation.

**Building\*:** Enter the Building where the contact person is located.

**Room\*:** Enter the Room where the contact person is located.

**Contact Name\*:** Enter the Contact Name of the person who is the best person to contact regarding this surplus.

**Contact Phone\*:** Enter the Contact persons Phone Number for this surplus.

**Contact Email\*:** Enter the Contact persons email address for this surplus.

**Campus Box\*:** This is where the asset labels will be mailed. (e.g. 39 UCB)

**Location Notes:** Add any additional Location notes.

Once all data has been entered, click the **Create** button.

## Surplus Header / Surplus Detail

Once a Surplus is created, you'll be taken to the Surplus Detail screen. At the top is the Surplus Header/Detail. It shows the data that was just entered to create the Surplus as well as the Surplus Number (every time a Surplus is created, it's given a unique number for tracking) and the Creation Date of the Surplus. This area is called the Surplus Transfer Header.

Home Assets Contacts **Transfers** Users

Successfully created Surplus Transfer. X

Transfer Sidebar: Surplus

**Surplus Detail**

Surplus Number: 17385  
Creation Date: 08/25/2016  
Submit Approval Date:   
Submit Approval User:   
Close Out Date:   
Close Out User:   
From Department: 10344 - COMPUTER SCIENCE - 1111 ENGINEERING DR. BOULDER CO 80309  
From Person: MICHKO, JILL  
Method: State Surplus  
Notes:   
Asset Label Creation Date:   
Tags Affixed Date:   
Pickup Date:   
Edit Submit For Approval

-- Contact Information --  
Sales Type:   
Debit Speed Type: 11002673  
Building: 439 - ENGINEERING OFFICE TOWER  
Room: 100  
Contact Name: JILL MICHKO  
Contact Phone: (303) 492-6324  
Contact Email: JILL.MICHKO@COLORADO.EDU  
Campus Box: 39 UCB  
Location Notes:

Documents & Images

Add Assets

Asset Number \*

Add Asset

[Create New Asset](#) [Transfer by Filter](#)

Import Assets

Assets

There are no assets on this surplus.

Cancel Remove Asset Receive Print Labels Print Detail

If the Surplus Transfer Header/Detail needs to be updated, you can use the Edit button to make those changes.

## Adding Asset/Property to a Surplus

Click on the Create New Asset line from the Surplus Detail.

Add Assets

Asset Number \*

Add Asset

[Create New Asset](#) [Transfer by Filter](#)

This will bring up a new window where a non-tagged asset can be created. Any field with an \* next to it is a required field.

The screenshot shows a software window titled "Insert Surplus Asset". At the top, there are four buttons: "Close", "Save & Same", "Save & New", and "Save & Done". Below the buttons, the form is divided into two main sections. The left section is titled "NON-TAGGED ASSET INSERT" and contains the following fields: "Asset Number \*" with a dropdown menu showing "[AUTO-ASSIGN]"; "CUID Tag Number" with an empty text box; "Item \*" with an empty text box and a magnifying glass icon; "Description \*" with an empty text box; "Department \*" with a dropdown menu showing "10344 - COMPUTER SCIENCE"; "Room Number \*" with a text box containing "100"; "Building \*" with a dropdown menu; "Credit Speed Type \*" with a dropdown menu. The right section is titled "-- Acquisition --" and contains: "Accounting Date \*" with a date picker showing "08/25/2016"; "Accounting Method \*" with a dropdown menu showing "STATE SURPLUS"; "Accounting Cost \*" with a text box showing "\$0.00"; "Accounting Description" with an empty text box; "Quantity \*" with a text box showing "1"; and "UoM \*" with a dropdown menu showing "EA". Below the "NON-TAGGED ASSET INSERT" section, there is a sub-section titled "-- Summary --" with the following fields: "Condition \*" with a dropdown menu; "Serial Num/VIN" with a text box; "Make/Manufacturer" with a text box; "Model" with a text box; and "Model Year" with a text box.

Once all required data has been entered, users can choose Save & Same to duplicate the entire non-tagged asset. Save & New brings up new non-tagged asset page and Save & Done returns the users to the Surplus Detail. Remember to type over the room number field and enter the room where the surplus assets are located.

This is a partial screenshot of the "Insert Surplus Asset" window, showing only the top portion with the title bar and the four buttons: "Close", "Save & Same", "Save & New", and "Save & Done".

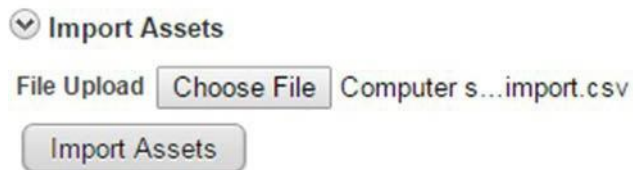
## Importing Asset/Property to a Surplus from a .csv file

1. You may find a copy of our Asset Import spreadsheet on our website here: \_

<https://www.colorado.edu/fm/node/6067/attachment/newest>

2. Columns A through H are required fields
3. Column I (Serial Number/VIN) is required if you are entering the following
  - a. COMPUTER/DESKTOP CPU
  - b. COMPUTER/LAPTOP
  - c. HARD DRIVE
  - d. SERVER
  - e. Vehicle
4. Enter in information for each asset until all assets have been entered.
5. Delete the header row from the spreadsheet as well as the \* notes at the bottom of the spreadsheet.
6. Save the file as a CSV (MS\_DOS) file, and remember where you saved it.
7. Upload the file to your transfer

Click on the Import Assets arrow icon in the middle of the Screen.



Click on the browse button and find the CSV. File you have created for import. Once you have found the file click on the Import Assets Button.

**Important Note:** The CSV file layout must include placeholder or actual data for the following fields: Item Description, Description, Department Number, Building Number, Room Number, Credit Speed Type, Condition, CUID Tag, Make/Manufacturer, Model, Quantity, UoM, and the Accounting Date. For Accounting Cost, if the cost is anything over than zero enter that value, if not it can be left blank. For fields such as CUID Tag Number, if the value is not known just leave blank. The following are all standard validated data that MUST match the data in AMS: Item Description, Department Number, Building Number, Credit Speed Type, Condition and UoM. See below for exact data layout.

Import Fields							
Field Name	Order	Min	Max	Required	Ignore	Default	Default Type
Item Description	10	-	120	Y	N	-	-
Description	20	-	120	Y	N	-	-
Department Number	25	-	120	Y	N	-	-
Room Number	30	-	120	N	N	-	-
Building	35	-	120	Y	N	-	-
Credit Speed Type	36	-	120	Y	N	-	-
Condition	40	-	25	Y	N	-	-
CUID Tag Number	41	-	120	N	N	-	-
Serial Num/VIN	45	-	120	N	N	-	-
Make/Manufacturer	50	-	30	N	N	-	-
Model	55	-	30	N	N	-	-
Model Year	60	-	4	N	N	-	-
Notes 1	65	-	256	N	N	-	-
Notes 2	70	-	256	N	N	-	-
Notes 3	75	-	256	N	N	-	-
Quantity	80	-	4	Y	N	1	Default
UoM	85	-	25	Y	N	EA	Default
Accounting Date	90	-	30	Y	N	1/1/1951	Default
Accounting Cost	95	-	30	Y	N	0.00	Default
Accounting Description	100	-	120	N	N	-	-
Accounting Type	105	-	25	Y	N	Original Acquisition	Overwrite
Accounting Method	110	-	25	Y	N	STATE SURPLUS	Overwrite
Status	115	-	25	Y	N	Active	Overwrite
Asset Number	121	-	120	Y	N	[AUTO-ASSIGN]	Overwrite

row(s) 1 - 24 of 24

If there are issues with any part of the surplus asset data you will see an error at the top of the Surplus header screen and none of the assets will be imported.

You will find specific error messages in error files on the CU ftp site. Access to the ftp requires a login/PW: <ftp.incircuit.com>. See the system administrator at CU for access information.

To add Documents and/or Images to an asset, users click the 0 and/or any number under the Documents/Images section of the asset. **THIS IS OPTIONAL.**

Successfully created Surplus Transfer.

Surplus Detail

Surplus Number: 17385  
 Creation Date: 08/25/2016  
 Submit Approval Date:  
 Submit Approval User:  
 Close Out Date:  
 Close Out User:  
 From Department: 10344 - COMPUTER SCIENCE - 1111 ENGINEERING DR, BOULDER CO 80309  
 From Person: MICHKO, JILL  
 Method: State Surplus  
 Notes:  
 Asset Label Creation Date:  
 Tags Affixed Date:  
 Pickup Date:  
 Edit Submit For Approval

Contact Information  
 Sales Type:  
 Debit Speed Type: 11002673  
 Building: 439 - ENGINEERING OFFICE TOWER  
 Room: 100  
 Contact Name: JILL MICHKO  
 Contact Phone: (303) 492-6324  
 Contact Email: JILL.MICHKO@CC.COLORADO.EDU  
 Campus Box: 39 UCB  
 Location Notes:

Documents & Images

Add Assets

Asset Number:   
 Add Asset  
[Create New Asset](#) [Transfer by Filter](#)

Import Assets

File Upload Choose File Computer s...import.csv  
 Import Assets

View	Asset Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
	10344-17385-001-NT	file cabinet	-	1	-	\$0.00	-	In Transfer	-	-	-	0	-

Download  
 Cancel Remove Asset Receive Print Labels Print Detail rows: 1 - 1 of 1

The Attachment Insert screen will appear.

Attachment Insert

File\* Choose File No file chosen

Comments

Valid file types are jpg, jpeg, gif, png, tiff, tif, txt, csv, pdf, doc, docx, xls, xlsx, ppt, pptx and zip with a max file size of 7 will be resized if possible.

Close Save & New Save & Close

Documents & Images for 10344-17385-001-NT

There are no files for this asset.

Use the Choose File button to browse out to the location(s) of the images of the asset. Double click on the image or document.

Users can label the image in the comments field. If there is more than one image it upload, then click, the Save & New button to upload more images. Click Save & Close to return to the Surplus Detail.

Users will know that documents and images are attached as there will be a number that is not a 0 listed under Documents and Images.

Import Assets

View	Asset Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
	10344-17385-001-NT	file cabinet	-	1	-	\$0.00	-	In Transfer	-	-	-	1	-

Download



## Correcting Asset Information in a Surplus Transfer

If a mistake is made when entering asset information to a Surplus Transfer, the best thing to do is to remove that asset and create a new one with correct information.

To do this, click on the Remove Asset button at the bottom of the Surplus Transfer.

The screenshot shows the 'Surplus Detail' form. It includes fields for Surplus Number (17385), Creation Date (06/25/2016), and various approval dates and users. The 'From Department' is '10344 - COMPUTER SCIENCE - 1111 ENGINEERING DR. BOULDER CO 80309' and the 'From Person' is 'MICHKO, JILL'. The 'Method' is 'State Surplus'. Below the form is a section for 'Documents & Images' and 'Add Assets' with an 'Add Asset' button. At the bottom, there is an 'Import Assets' section with a table of assets.

View	Asset Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
	10344-17385-001-NT	file cabinet	-	1	-	\$0.00	-	In Transfer	-	-	-	1	-

Buttons at the bottom: Cancel, Remove Asset, Receive, Print Labels, Print Detail. Row(s) 1 - 1 of 1.

When you click on that button, a Remove Assets area will appear. Next to Asset To Remove is a field with a drop down arrow. Click on that arrow and find the asset you would like to remove from your Surplus Transfer.

The screenshot shows the 'Remove Assets' form. It has a dropdown menu for 'Asset To Remove' with '10344-17385-001-NT' selected. There is a 'Remove Asset' button. Below is an 'Assets' section with a table of assets.

View	Asset Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
	10344-17385-001-NT	file cabinet	-	1	-	\$0.00	-	In Transfer	-	-	-	1	-

Buttons at the bottom: Cancel, Add Assets, Receive, Print Labels, Print Detail. Row(s) 1 - 1 of 1.

Select the Asset Number and click on the Remove Asset button to the right of the field to complete the removal.

Then, enter new asset information by clicking on "Create New Asset" and filling out the required fields.

The screenshot shows the 'Add Assets' form. It has a text input field for 'Asset Number \*' with a magnifying glass icon. Below the field is an 'Add Asset' button. At the bottom, there are two links: 'Create New Asset' (circled in red) and 'Transfer by Filter'.

## Completing a Surplus Transfer

Once all assets are entered, the Surplus can be submitted for approval.

Note: You cannot make any more changes to the Surplus Transfer once it has been submitted for approval.

Successfully created Surplus Transfer. x

Transfer Sidebar

Surplus

Surplus Detail

Surplus Number: 17385  
Creation Date: 08/25/2016  
Submit Approval Date:  
Submit Approval User:  
Close Out Date:  
Close Out User:  
From Department: 10344 - COMPUTER SCIENCE - 1111 ENGINEERING DR, BOULDER CO 80309  
From Person: MICHKO, JILL  
Method: State Surplus  
Notes:  
Asset Label Creation Date:  
Tags Affixed Date:  
Pickup Date:  
Edit Submit For Approval

-- Contact Information --  
Sales Type:  
Debit Speed Type: 11002673  
Building: 439 - ENGINEERING OFFICE TOWER  
Room: 100  
Contact Name: JILL MICHKO  
Contact Phone: (303) 492-6324  
Contact Email: JILL.MICHKO@COLORADO.EDU  
Campus Box: 39 UCB  
Location Notes:

Documents & Images

Add Assets

Asset Number \*  
Add Asset  
Create New Asset Transfer by Filter

Import Assets

File Upload Choose File Computer s...import.csv  
Import Assets

Assets

View	Asset Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
	10344-17385-001-NT	file cabinet	-	1	-	\$0.00	-	In Transfer	-	-	-	1	-

Download

Cancel Remove Asset Receive Print Labels Print Detail

row(s) 1 - 1 of 1

Click on the Submit For Approval below the header of the Surplus Transfer.

Congratulations! You have created your surplus transfer. Now, Property Services staff will process your request.

## What Happens Next . . .

After your disposal request has been entered and authorized in the Surplus Property Management System, property services staff will email the contact person with instructions.

Labels will be sent to the disposal request contact person through campus mail with a note instructing them to contact Steve Marvel when the labels have been affixed to all surplus items.

When Property Services has been notified that the items are ready, they will schedule the crew to come and remove your surplus.

On average, it takes Property Services six calendar days to pick up a disposal request from the date the department notifies us the tags have been affixed and the items are ready for pick up.

Property Services completes approximately 150 disposal requests each month. The scope of one disposal request can range from a single item to a multiple-truck pick-up.

Property Services is Generally Funded to pick up surplus property on the CU Boulder campus. That means, your surplus items will be picked up at no charge to your department. An exception to this, is our \$95 charge for refrigerant reclamation to cover our hazardous materials disposal costs.

Jack Brubaker, [Jack.Brubaker@colorado.edu](mailto:Jack.Brubaker@colorado.edu) (303-492-7207) and Jillandra Michko, [Jillandra.Michko@colorado.edu](mailto:Jillandra.Michko@colorado.edu) (303-492-6324) are available to help you with the process of registering your department and creating disposal requests.

# Reports

# WIP Report

## WIP (Work in Progress) Report

Ask Andrew Calvo ([Andrew.Calvo@colorado.edu](mailto:Andrew.Calvo@colorado.edu)) to add you to the mailer – you will receive the WIP report every Monday and Wednesday. The Wednesday report will have notes on it – use the Wednesday report to edit and make your own specific to RES.

Follow the instructions below to do so and send to Steven by end of day Wednesday in order to go through the report for the Thursday morning Building Engineers meeting.

1. Open WIP report from Andrew Calvo
2. Open WIP report from prior week found here: \\copperpin\RPS\Administrative\Reports\WIP Tracking\2019 WIP Reports
3. Save file as  WIP and HOLD Report XX.XX.XX  in the 2018 WIP Reports folder
4. Go to the “Stats” tab on the report you just saved and transfer the “Current Week Percentages” over to the “Previous Weeks Overall Stats” and change the date in the yellow highlight section.
5. Go to the report you were emailed and begin to put full columns in correct order as follows and delete the “days overdue” column:

BUILDING_ABBR	ENTER_DATE	DUE_DATE	PRIORITY	MAINT_TYPE	REQ_NUMBER	WO_NUMBER	DESCRIPTION	ACCT_SEI	ACCT	CREW	WO_STATUS	ASSIGNED_T	NOTES
---------------	------------	----------	----------	------------	------------	-----------	-------------	----------	------	------	-----------	------------	-------

6. Select the “enter date” column - at the top of the page choose the “data” editing tab and select “text to columns” and double click on the black arrows to remove them.
7. Complete the task and sort the “enter date” column “from oldest to newest”.
8. Copy all data and paste it onto the “Data” tab on the new report.
9. Once copied onto the “Data” tab, scroll to the right and find the yellow “Formatted Data” column and make sure it is adjusted to appear for all rows. You may have to delete extra or pull down for additional rows.
10. If there are any Custodial, Cluster 1 or Cluster 9’s on the report, make sure you change the field on the “Stats” page to match, or it will not show up on the report at all.
11. Go to the “Stats” tab and update the Total Work Orders number on the Current Week Percentages zone. This has to be hard keyed in, it will not automatically update. This number should also match the green highlighted number above In the Total WIP Overall Weekly Stats column highlighted in green.
12. Delete the first three rows:

	BLDG_CO	ENTER_DATE	DUE_DATE	PRIORITY	MAINT_TY	REQ_NUMBE	WO_NUMBE	DESCRIPTION	SPEEDTY	ACCT_CO	CREW	WO_STATU	ASSIGNED_T	NOTES
1	TB82	6/1/2015 13:19	05/19/2018	4	REPAIR	SR213448	W618840	TB82 1333-1335 YJ TRAPS AND REMOVE ACTIVE NESTS IF FOUND.	12030591	515179	IPM	WAIT_CUST	HARVEYSD	Scheduled for 4-9
3	JILA	11/20/2015 11:56		4	REPAIR	PR008437	W645799	JILA ELEVATOR SERVICES AND STATE LICENCING FEES	12000725	515192	FSYS-ELEV	HOLD_OTHER	SWINDELL	
4	SPSC	5/5/2016 11:42	05/19/2018	4	REPAIR	SR230886	W670407	SPSC -3RD FLOOR PATIOS YJ TRAPS	12000009	515179	IPM	WAIT_CUST	HARVEYSD	Part Hold; see notes

13. Go to the “Stats” tab to view how many columns should be colored red, yellow, green and starting from the top, color the red, yellow, then green on the “Data” tab of the emailed report.

	A	B	C	D	E	F	G	H
	BLDG_CODE	ENTER_DATE	DUE_DATE	PRIORITY	MAINT_TYP	REQ_NUMBER	WO_NUMBER	DESCRIPTION
2	TB99	9/8/2016 8:22	04/22/2018	4	REPAIR	SR238372	W690855	TB 99 - 1429 GV WOLF SPIDERS AND MICE
3	JILA	6/14/2017 14:24	07/06/2017	4	REPAIR	SR253989	W734385	JILA X WING DEHUMIDIFICATION
4	JILA	8/22/2017 7:15	09/13/2017	4	REPAIR	PR008836	W745524	JILLA-B2B10-REPLACE 3-WAY TEMPERING CONTROL VALVE
5	JILA	8/22/2017 7:19	09/30/2017	4	REPAIR	PR008836	W745526	JILLA-B2B10 REPLACE 3-WAY TEMPERING CONTROL VALVE
6	JILA	8/22/2017 7:20	02/28/2018	4	REPAIR	PR008836	W745527	JILLA B2B10-REPLACE 3-WAY TEMPERING CONTROL VALVE
7	CINC	1/4/2018 10:57	01/26/2018	4	REPAIR	SR265356	W766960	CINC INSTALL ISOLATION VALVE ON DEAD LEG *ATT LARRY
8	RL2	1/18/2018 14:26	03/30/2018	4	REPAIR	W768201	W768201	RL2 26A MISSING WIRING FROM FAN TO HEATER **SEE TASK
9	JILA	1/17/2018 8:33	02/07/2018	4	REPAIR	W768255	W768255	JILA EAST SIDE OF TOWER NOT GETTING HEAT MULTIPLE OFFICES
10	CINC	1/18/2018 7:30	02/28/2018	2	REPAIR	SR266070	W768595	CINC 260 NEED SEAL REPLACED **SEE TASK
11	WALN	2/5/2018 8:58	02/22/2018	2	REPAIR	SR267024	W771914	WALN N120 WATER HEATER LEAKING
12	JILA	2/8/2018 21:44	04/13/2018	3	REPAIR	SR267294	W772354	JILA B2B10 BACKFLOW DEVICE LEAKING
13	JILA	2/13/2018 7:19	03/20/2018	4	FAB	SR267495	W772781	JILA X231 INSTALL REBUILT HUMIDIFICATION PUMP
14	MISSC	2/13/2018 11:42	03/06/2018	4	REPAIR	SR267533	W772809	MISSC E194 REPLACE BOTH BLINDS **SEE TASK
15	LSTR	2/16/2018 8:59	03/16/2018	2	REPAIR	SR267737	W773696	LSTR ANDOVER ALARM FOR CHILLER 1 **SEE TASK
16	WALN	2/20/2018 11:37	04/20/2018	2	REPAIR	W773964	W773964	WALN PLUMBING ALARM GONG OFF **SEE TASK
17	LSTR	2/26/2018 8:04	03/19/2018	4	REPAIR	SR268245	W776179	LSTR A144A WORKBENCH LIGHTING ISSUE **SEE TASK
18	CINC	3/1/2018 15:42	03/22/2018	4	FAB	SR268499	W777183	CINC 192A INSTALL OXYGEN SENSOR **SEE TASK
19	SPSC	3/2/2018 10:49	03/23/2018	4	REPAIR	SR268524	W777604	SPSC E382 AREA IS COLD
20	SPSC	3/5/2018 10:50	03/26/2018	4	REPAIR	SR268603	W777450	SPSC W381 MOTION SENSOR LIGHTS
21	JILA	3/7/2018 9:17	03/21/2018	3	REPAIR	SR268761	W777578	JILA S1840 IDENTIFY WIRING IN LAB FOR POSSIBLE 480 PLUG.
22	SPSC	3/8/2018 10:37	03/29/2018	4	REPAIR	SR268834	W777777	SPSC RRNM140A MENS SHOWER WATER HEAT DIMINISHING
23	JILA	3/9/2018 8:59	04/02/2018	4	REPAIR	SR268893	W777852	JILA CRX1B30 O2 ALARM
24	JILA	3/9/2018 10:02	04/02/2018	4	REACTIVE	W777863	W777863	JILA B2B10 DOMESTIC HW POTABLE PIPE LEAKING IN CEILING
25	RI 2	3/9/2018 11:07	04/02/2018	4	FAB	SR268969	W777886	RI 2 - 15R X 15R - NFW SIGN REQUIST

	More than 3 months	2-3 Months	1-2 Months
Access Services	0	0	0
Electrical	0	1	3
Fire/Elevator	0	0	0
HVAC	1	1	3
Signs/Paint	0	0	0
Pipes	1	0	3
Structural	0	0	1
Preventative Maint	0	0	0
Pest Management	1	0	0
Small Construction	1	0	0
Custodial	0	0	0
Grounds	0	0	0
Building Engineers	0	0	0
Projects	2	0	0
<b>Total</b>	<b>6</b>	<b>2</b>	<b>10</b>
<b>Total On Hold:</b>	<b>2</b>	<b>0</b>	<b>0</b>

14. On the email report, delete columns to match columns to those on the “WIP Tracking” tab:

WIP Tracking (Updated 04/04/2018)							
Enter Date	Wo Number	Description	Acct Segment1	Crew	Wo Status	Comments	

15. On the email report, begin filtering by crew, then copy and paste each onto the new report’s “WIP Tracking” tab.

16. Change the date to match the rest of the report on the “WIP Tracking” tab.

17. Double check to make sure the total numbers match on the WIP Tracking and Stats tabs.

18. Print the WIP Tracking and Stats tab, stable and leave a copy in SREO and JREO’s inbox.

19. JREO to analyze the WIP report. Follow up with appropriate shops on work orders that are over 30 days. Actively try to close work orders that are over 3 months.

# Leasing Status Report

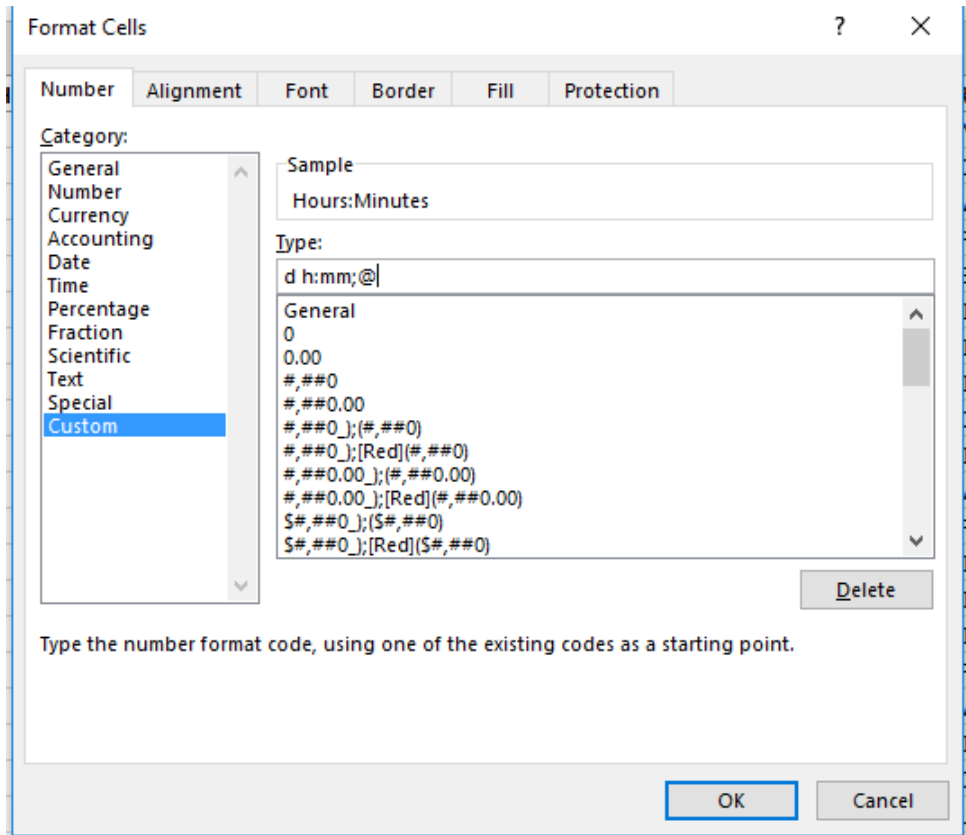


1. The Leasing Status Report is updated bi-weekly by the JREO and brought to the Staff/Team Meeting
2. The purpose of the Leasing Status Report is to provide a current snapshot and status on the following:
  - a. New lease agreements, new license agreements, new MOUs, new amendments
  - b. Upcoming expirations of leases, licenses, MOUs and their renewal/termination status
  - c. To keep track of renewal option notice dates
  - d. Any other information or dates relating to new or current agreements
3. The status updates for these agreements will include information on where we are in negotiating the new agreement, renewal agreement, or amendment
4. Additionally, the Leasing Status Report will describe whether the agreement is in DocuSign or if it has been fully executed
5. It is expected that the JREO will keep this report current, and will bring an updated copy to the bi-weekly Team Meeting where they will present the details of the report to the rest of the staff

# Response Time Report

## Response Time Report (monthly)

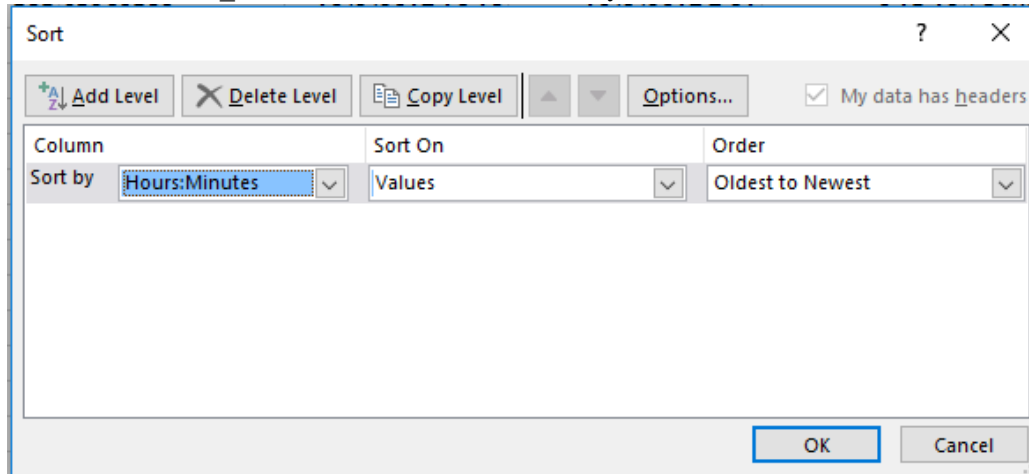
1. Email Bea Antequera [antequer@colorado.edu](mailto:antequer@colorado.edu) on the 22<sup>nd</sup> of each month:
  - o “Could you send me the report for XX/22/18 – XX/21/18? Thank you!”
2. Once received, open last month’s report found here: <\\copperpin\RPS\Administrative\Reports\Response Time Reports\2018 Response Time Reports>
3. Move current averages to past averages and change dates on each to match
4. On “All” tab remove “canceled from “ WO\_STATUS & REQ\_STATUS
5. Insert “Hours\_Minutes” column in-between “Schedule Date” & “Crew”
6. Right click and format cells to the following



ENTER_DATE	SCHEDULE_DATE	Hours:Minutes	C
9/22/2017 11:45	9/22/2017 11:45	=E2-D2	H
9/25/2017 8:46	9/25/2017 10:15		E
9/28/2017 8:21	9/28/2017 8:51		S

7. Drag to all cells and delete any #####

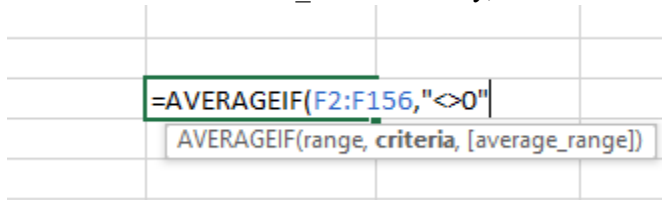
8. Sort the “Hours\_Minutes” column the follow way:



9. Delete all “oo:oo” entries.

10. Filter out all data that belongs to a non-RES speedtype.

11. Below the last “Hours\_Minutes” entry, insert this formula and adjust the final cell number accordingly.



12. Paste all data onto Response Time saved doc. in the tabs specific to each Shop and insert the number of work orders and average time on the Summary tab as you update each Shop tab.

13. Email new report to SREO for approval and print once approved to be added to the Monthly Report.

14. SREO to monitor and analyze changes in response times to ensure that RES is providing good service to its tenants.