



How to get a Capital Equipment Tag and Rate Sheet

Getting a Capital Equipment Tag and adding it to your Rate Sheet is a multi-step process involving several offices. This guide will help you through the process. Once you have the funds to purchase the instrument, feel free to notify Joe Dragavon, who can help coordinate the next steps.

a. joseph.dragavon@colorado.edu

1. Create PO, Receive and Inspect Instrument

- a. The PO is created by the PI/Home Unit in Marketplace
- b. The instrument is received and inspected

2. Release funds for Payment and Start the Property Tag Request Process

- a. Once the instrument is validated, please inform your purchasing agent to issue the payment. To expedite the process, please include the details below: in the CU Marketplace PO Comments Section
 - i. Serial Number:
 - ii. PI:
 - iii. Department:
 - iv. Capital Equipment Location:
 - v. Manufacturer:
 - vi. Model:
 - vii. Suggested Description (Brief, for the Tag):
 - viii. Source of Funds (i.e. funding agency and program, award number, startup funds, ...)
- b. Notify CCO Property by adding a “recipient” to the CU Marketplace PO:

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

- i. [Email notification\(s\) | Add recipient](#) 
- c. CCO Property property@colorado.edu
- d. Check in regularly with your purchasing offer to make sure all the documents have been signed and released.

3. Launch Rate Sheet Approval Process

- a. If this will be part of your Core, and you want to invoice against it, then please contact the BFP RBSA team to start updating your rate sheet.
 - i. rates@colorado.edu
- b. This step can start before the Property Tag and Service Determination are complete.



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- c. The new Service/Rate cannot be certified for Federal and External Customers until OCG Service Contracts officially determines the equipment is eligible for services. Only Services/Rates to be sold to Federal and External Customers need to be determined by OCG
- d. **Until BFP certifies the Service/Rate, you are not allowed to sell that Service/Rate**

4. Property Tag Generation

- a. Once the funds have been fully paid and is posted on the General List, the item will show up on the Monthly Report pulled by CCO Property. While not necessary, it may be useful to notify CCO Property that the item has been added.
 - i. CCO Property property@colorado.edu
 - 1. Specify to CCO Property this Tag is required for Rate Setting within a Core Facility

5. Once you have received the Tag, request approval from OCG Service Contracts:

- a. Attach it to the instrument
- b. Complete a Service Determination Request Form.
 - i. <https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?key=UFKey>
 - ii. Contact OCG Service Contracts if you need assistance: Ocgservicecontracts@colorado.edu
- c. OCG Service Contracts is responsible for determining whether the instrument can be invoiced against

6. Finalize your Rate Sheets

- a. Once you receive approval from OCG Service Contracts:
- b. Notify the BFP RBSA team
 - i. rates@colorado.edu
 - ii. Note: OCG Service Contracts does notify BFP RBSA, but this step helps ensure awareness.
- c. Work with BFP to finalize your updated rate sheet.
- d. BFP will send out a final certification email for your updated rate sheet.

7. Congratulations! You are now all set!

- a. Once you have the Tag and the Rate Sheet is approved, you are good to go.

Additional Reading:

- a. Tagging and Record of Property, OCG
 - i. <https://www.colorado.edu/ocg/32-tagging-and-record-property>



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- b. Capital Equipment – PAO Standard Operating Procedure
 - ii. <https://www.colorado.edu/controller/resources/capital-equipment-pao-standard-operating-procedures>
- c. OCG Service Activity Determination
 - iii. <https://www.colorado.edu/ocg/service-activity-determinations>