IT Asset Management

ProPath

Office of Information and Technology

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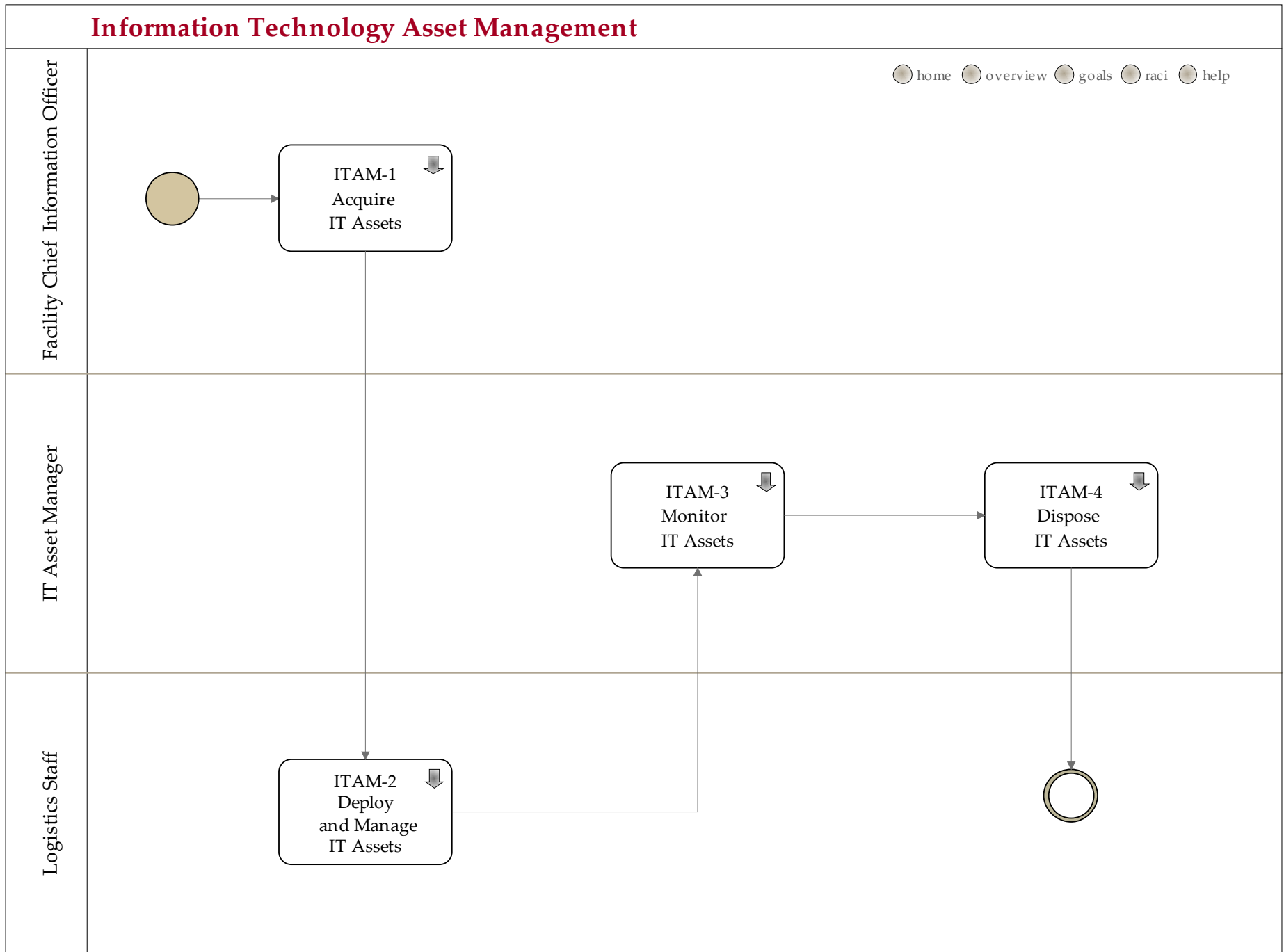
IT Asset Management Process Maps

Facility Chief Information Officer

home   overview   goals   raci   help

ITAM-1
Acquire
IT Assets

IT Asset Manager

ITAM-3
Monitor
IT Assets

ITAM-4
Dispose
IT Assets

Logistics Staff

ITAM-2
Deploy
and Manage
IT Assets

Facility Chief Information Officer

ITAM 1.1
National
Buys

ITAM-1.2
Regional
Buys (Activations)

ITAM-1.3
Local
Procurement
Purchases

Yes

National
Buy?

No

Regional
Buy?

Yes

No

Information Technology Asset Management: ITAM-1.1 National Buys

Project Manager

- ITAM-1.1.3 Analyze Data at National Level
- ITAM-1.1.4 Submit ITARS Request
- ITAM-1.1.5 Make Budget Decision
- Continue ? (No / Yes)
- ITAM-1.1.9 Communicate Asset Management Purchase to the Field

Integrated Product Team

- ITAM-1.1.6 Define Specifications for Equipment
- ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS
- **To:** ACQL Acquisition Life Cycle
- **From:** ACQL Acquisition Life Cycle
- ITAM-1.1.8 Execute Procurement

Regional Director

- ITAM-1.1.2 Validate Refresh Data

Facility Chief Information Officer

- Special Funding? (No / Yes)
- Input Required? (No / Yes)
- Life Cycle? (No / Yes)
- ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility
- **To:** ITAM-1.3.2 Execute Special Funding

Information Technology Asset Management: ITAM-1.2 Regional Buys (Activations)

Regional Acquisition Team

ITAM-1.2.7
Submit
Request to Purchase

To: ACQL
Acquisition Life
Cycle

From: ACQL
Acquisition Life
Cycle

ITAM-1.2.8
Refine
Order

ITAM-1.2.9
Communicate
Asset Management
Purchase to the
Field

Integrated Product Team

ITAM-1.2.6
Review
Specifications for
Equipment

Facility Chief Information Officer

Special
Funding?

No

Yes

ITAM-1.2.1
Identify
New Activation
Projects

ITAM-1.2.2
Determine
Activation Scope

To: ITAM-1.3.2
Execute
Special Funding

ITAM-1.2.3
Open
Activation Request

ITAM-1.2.4
Notify
Regional Acquisition
Team

ITAM-1.2.5
Submit
ITARS Request

To: ITAM-2
Deploy
and Manage IT
Assets

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Regional Acquisition Team

ITAM-1.2.8.1
Define
Procurement /
Delivery
Requirements

ITAM-1.2.8.2
Refine
Network Design

ITAM-1.2.8.5
Refine
Server Order

ITAM-1.2.8.8
Refine
Laptop Order

ITAM-1.2.8.3
Refine
Wireless Network

ITAM-1.2.8.6
Refine
PC Order

ITAM-1.2.8.9
Refine
Content Delivery
Engine

ITAM-1.2.8.4
Refine
Telephone System

ITAM-1.2.8.7
Refine
Printer & Scanner
Order

ITAM-1.2.8.10
Refine
Telecommunication
Requirements

Facility Chief Information Officer

ITAM-1.3.2
Execute
Special Funding

ITAM-1.3.1
Gather
Business Line
Requirements

Special
Funding?

Yes

No

Activation?

No

Yes

ITAM-1.3.3
Execute
Break - Fix

ITAM-1.3.4
Develop
Activation Projects

Information Technology Asset Management: ITAM-1.3.2 Execute Special Funding

Regional Director

ITAM-1.3.2.2
Determine
Procurement Plan

Facility
Buy?

No

Yes

ITAM-1.3.2.3
Identify
Funded Facility
Requirements

ITAM-1.3.2.4
Identify
Funded SLM
Requirements

Approving Official

ITAM-1.3.2.7
Approve
ICAP 2237

Approve?

Yes

No

Regional Acquisition Team

ITAM-1.3.2.6
Create
and Submit IFCAP
2237

ITAM-1.3.2.8
Submit
IFCAP 2237 to
Purchasing

Yes

ITARS
Approved?

No

Facility Chief Information Officer

ITAM-1.3.2.1
Prioritize
Projects

ITAM-1.3.2.5
Submit
ITARS Request

From: ITARS
Information
Technology
Acquisition
Request System

To: ITARS
Information
Technology
Acquisition
Request System

To: PUR
Purchase

From: PUR
Purchase

Information Technology Asset Management: ITAM-1.3.4 Develop Activation Projects

Facility Chief Information Officer

ITAM-1.3.4.1
Identify
Local Projects

ITAM-1.3.4.2
Solicit
Local VA
Leadership Input

IT Asset Manager

ITAM-1.3.4.4
Determine
Activation Meets
Requirements
Definition

Activations?

Yes

No

To: ITAM 1.2
Regional Buys
(Activations)

To: ITAM 1.3.2
Execute
Special Funding

Local VA Leadership

ITAM-1.3.4.3
Provide
Feedback
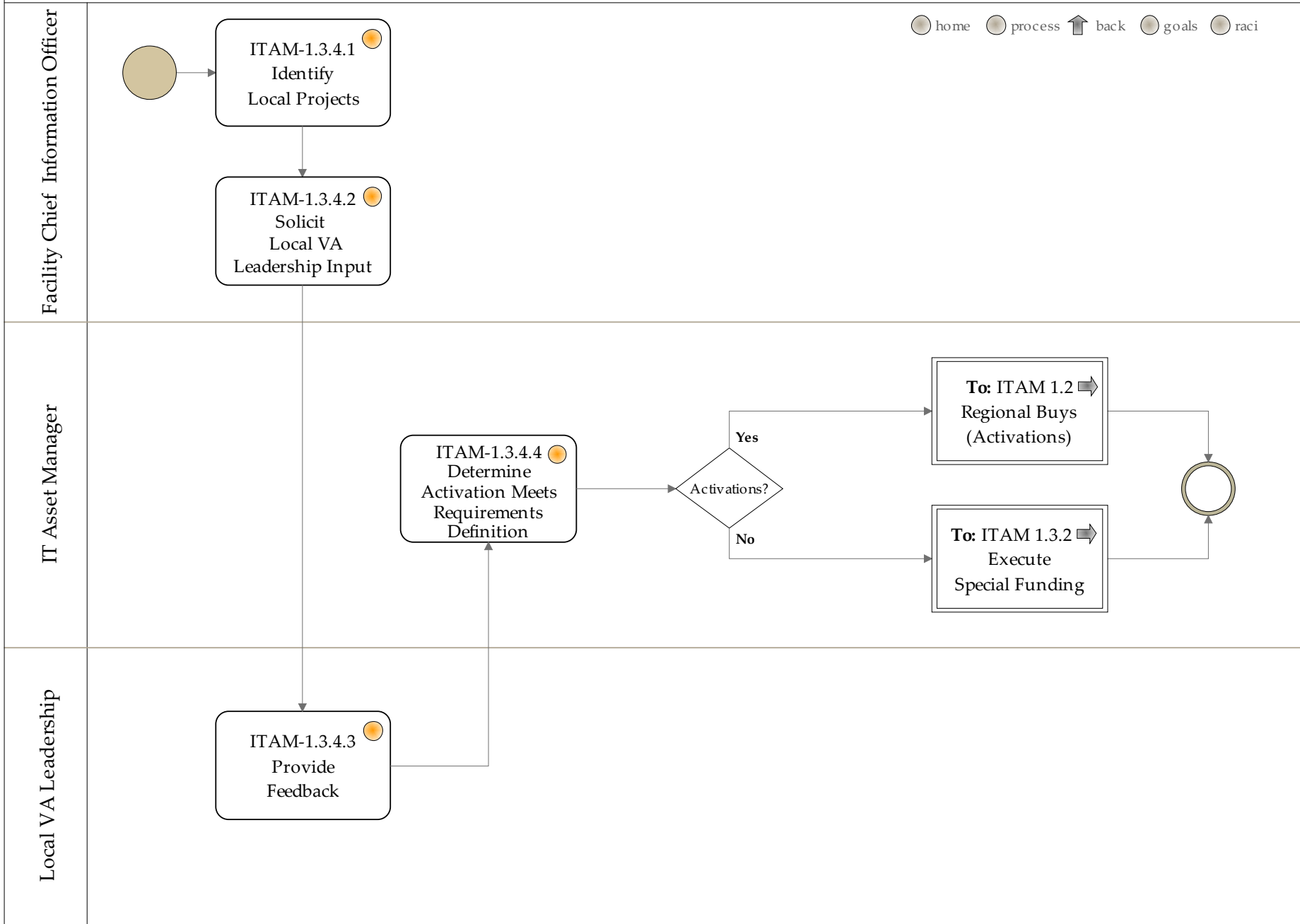
Information Technology Asset Management: ITAM-2 Deploy and Manage IT Assets
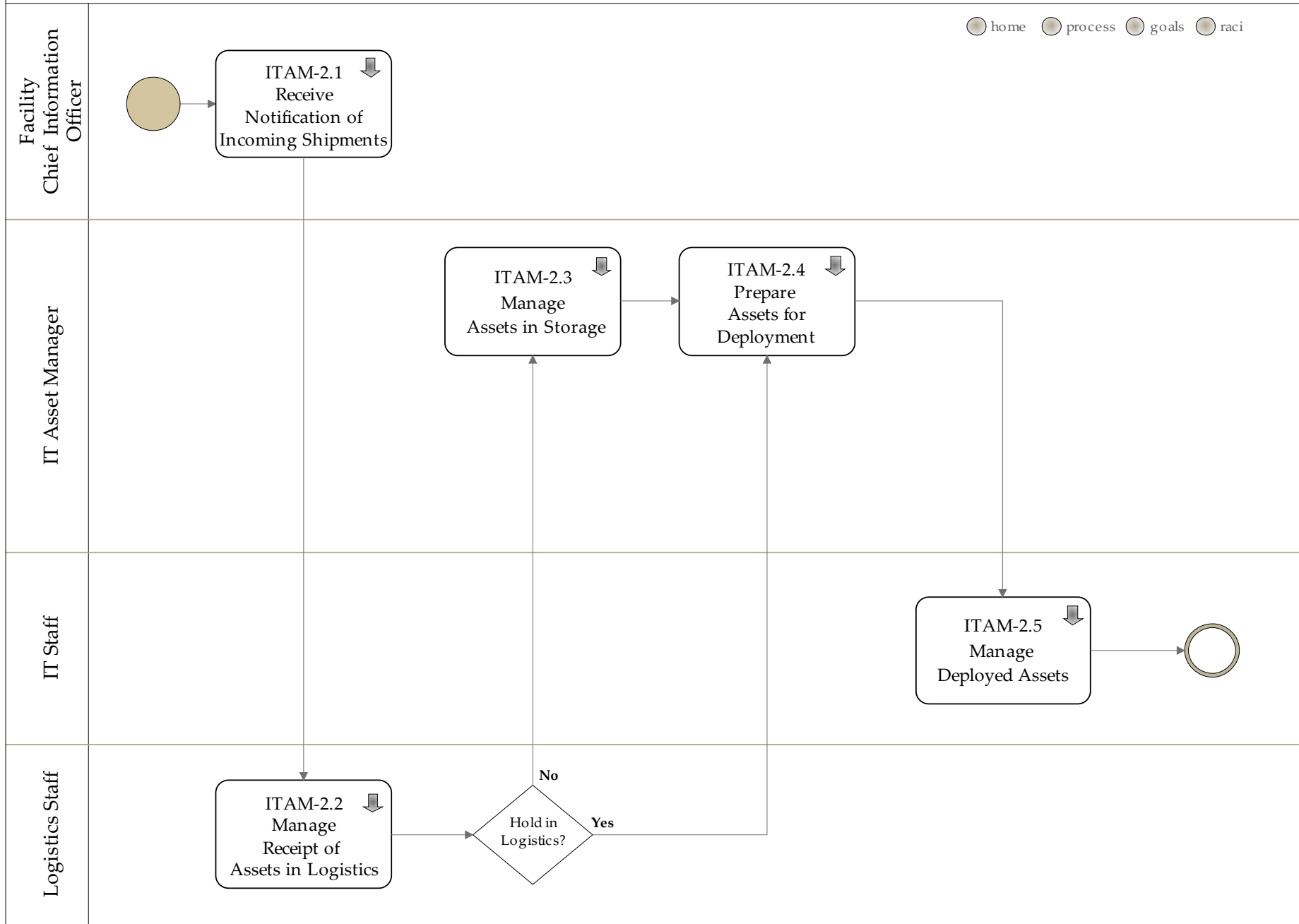
Facility Chief Information Officer

ITAM-2.1
Receive
Notification of
Incoming Shipments

IT Asset Manager

ITAM-2.3
Manage
Assets in Storage

ITAM-2.4
Prepare
Assets for
Deployment

IT Staff

ITAM-2.5
Manage
Deployed Assets

Logistics Staff

ITAM-2.2
Manage
Receipt of
Assets in Logistics

No

Hold in
Logistics?

Yes

The links in this process map are inactive. Please scroll to view activity data.   9

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Facility Chief Information Officer

ITAM-2.1.1
Notify
Logistics of Pending
Shipments

IT Asset Manager

ITAM-2.1.2
Resolve
Split Delivery Dates

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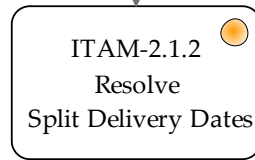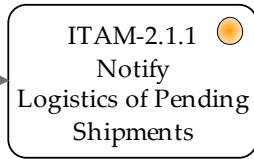
Information Technology Asset Management: ITAM-2.2 Manage Receipt of Assets in Logistics

IT Asset Manager

ITAM-2.2.6
Notify
GIP of Consumables

ITAM-2.2.9
Crosscheck
Barcode Label to
Equipment

Logistics Staff

ITAM-2.2.2
Identify
Components

ITAM-2.2.3
Identify
and Record Serial
Numbers

ITAM-2.2.5
Count
Assets to Match
Receiving
Documents

ITAM-2.2.7
Prepare
Barcode Label

ITAM-2.2.1
Verify
Invoice and
Equipment

ITAM-2.2.4
Produce
NX Catalog
Validation Report

ITAM-2.2.8
Validate
Barcode Label
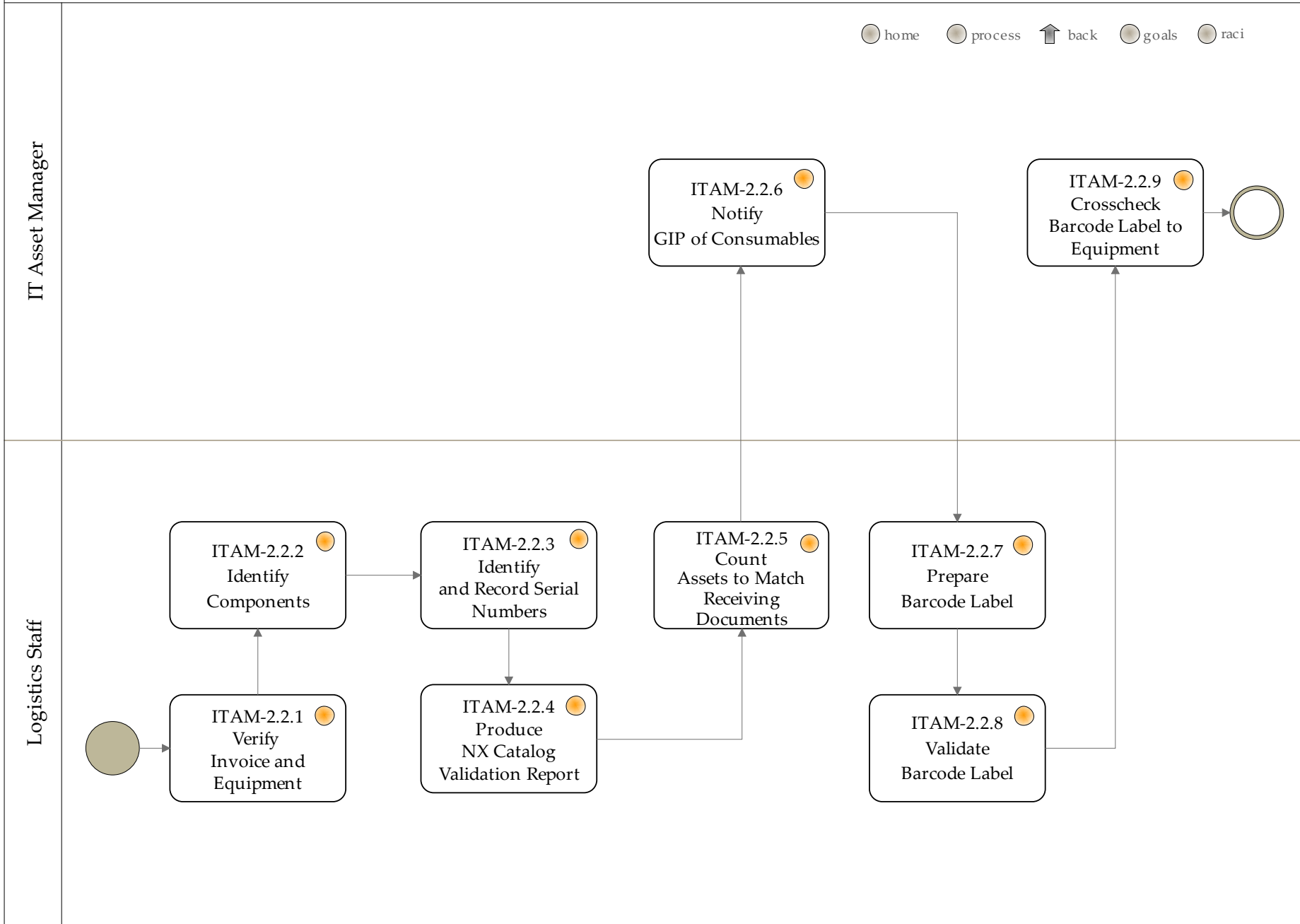
Information Technology Asset Management: ITAM-2.3 Manage Assets in Storage

Facility Chief Information Officer

ITAM-2.3.2
Obtain
Secure Storage
Space

ITAM-2.3.6
Prepare
Deployment Plan

IT Asset Manager

ITAM-2.3.3
Limit
Access to
Storerooms

ITAM-2.3.5
Perform
Periodic Inventory
Scans

IT Staff

ITAM-2.3.1
Receive
Equipment
from Logistics

ITAM-2.3.4
Scan
Equipment Into
Storage

IT Asset Manager

ITAM-2.4.1
Scan
for Deployment to
Staging Area

ITAM-2.4.2
Validate
Updated Location

IT Staff

ITAM-2.5.3
Obtain
End-User
Signature

ITAM-2.5.4
Deploy
Asset

ITAM-2.5.2
Update
Location
Records

Mobile/
Loaned
Equipment?

Yes

No

Logistics Staff

ITAM-2.5.1
Remove
Assets
from Storage

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Information Technology Asset Management: ITAM-3 Monitor IT Assets
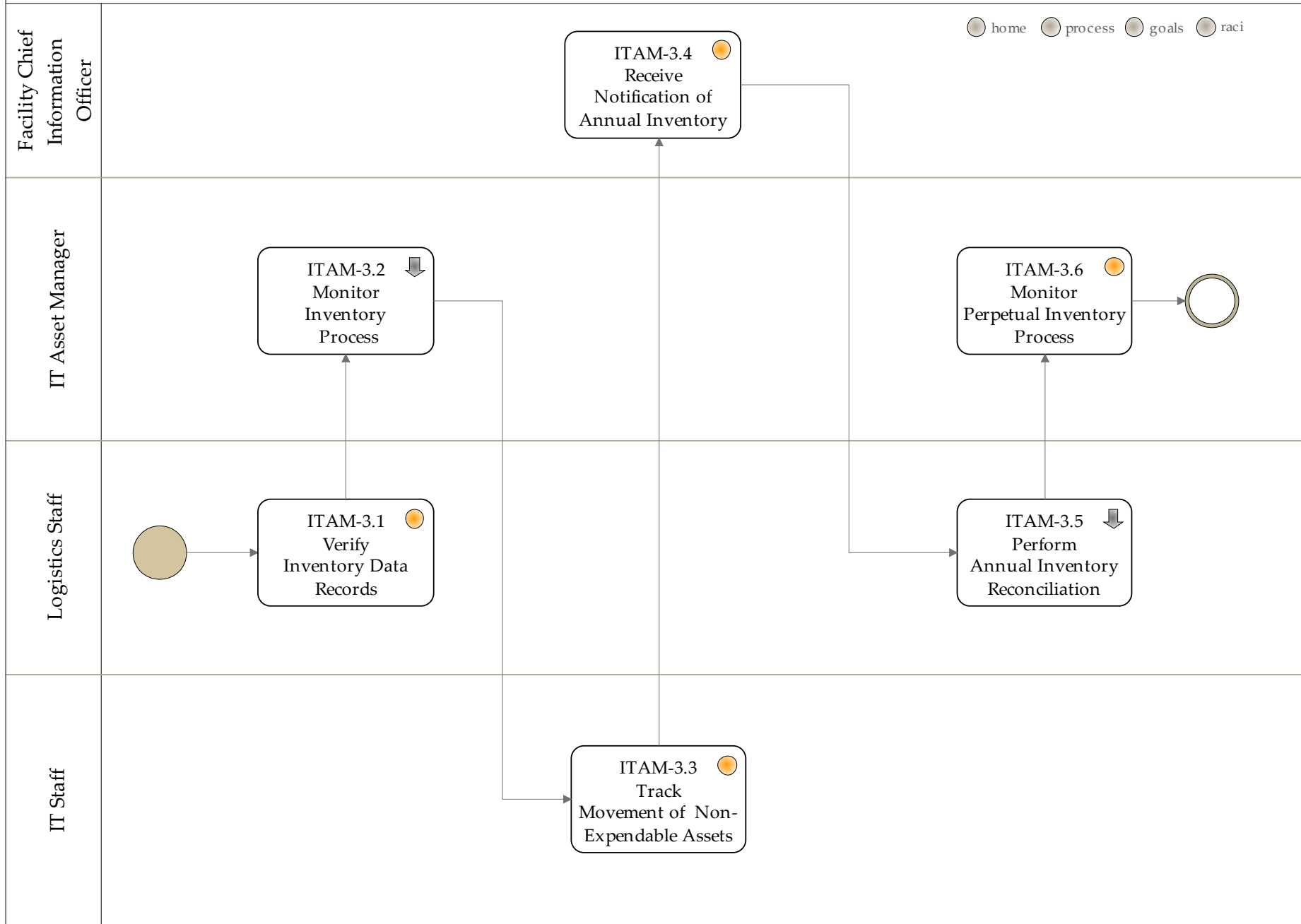
Facility Chief Information Officer

ITAM-3.4
Receive
Notification of
Annual Inventory

IT Asset Manager

ITAM-3.2
Monitor
Inventory
Process

ITAM-3.6
Monitor
Perpetual Inventory
Process

Logistics Staff

ITAM-3.1
Verify
Inventory Data
Records

ITAM-3.5
Perform
Annual Inventory
Reconciliation

IT Staff

ITAM-3.3
Track
Movement of Non-
Expendable Assets

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IT Asset Manager

ITAM-3.2.1
Prepare
Inventory
Schedule

ITAM-3.2.2
Conduct
Annual Inventory
Scans

Facility Chief Information Officer

ITAM-3.5.6
Submit
Equipment
Inventory List

IT Asset Manager

ITAM-3.5.2
Reconcile
Exception Listing

ITAM-3.5.3
Perform
Annual Inventory

Missing
Equipment?

Yes

No

ITAM-3.5.4
Generate
Report of Survey
Form

Logistics Staff

ITAM-3.5.1
Produce
Exception Listing

ITAM-3.5.5
Reconcile
Equipment
Inventory Listing

ITAM-3.5.7
Perform
5% Verification
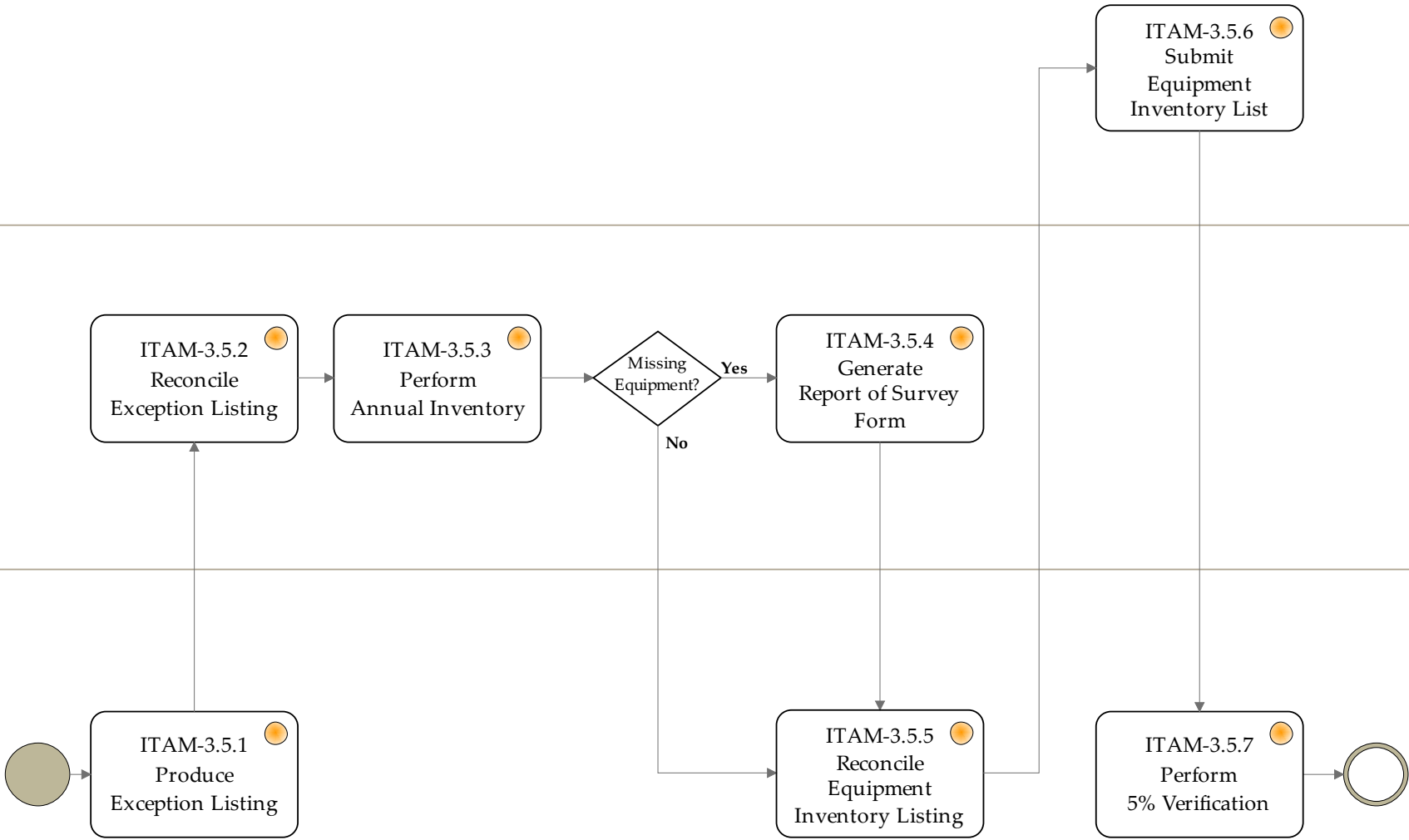
Information Technology Asset Management: ITAM-4 Dispose IT Assets

IT Staff

ITAM-4.2
Sanitize
Equipment

IT Asset Manager

ITAM-4.1
Prepare
Equipment for
Turn-In

Yes

Electronic
Media?

No

ITAM-4.3
Submit
Electronic Turn-In
Request

ITAM-4.4
Validate
Turn-In Date

ITAM-4.5
Coordinate
Transfer to Logistics

Logistics Staff

ITAM-4.6
Remove
Equipment
from EIL
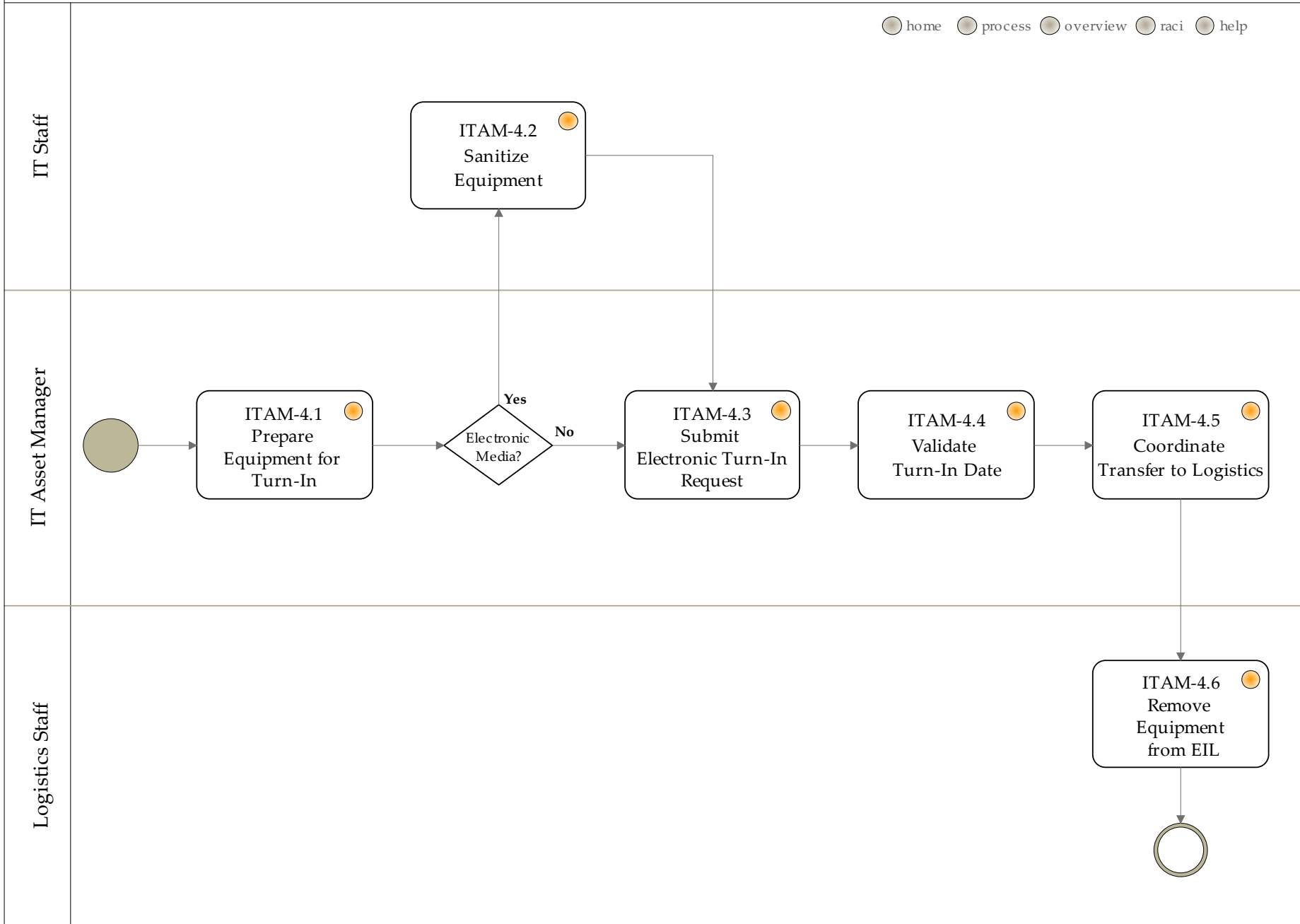
Process: IT Asset Management

Overview: The process map for IT Asset Management cycles through the following process and review activities:

ITAM-1 Acquire IT Assets
ITAM-1-DEC01 National Buy?
ITAM-1-DEC02 Regional Buy?
ITAM 1.1 National Buys
ITAM-1.1-DEC01 Special Funding?
ITAM-1.1-DEC02 Input Required?
ITAM-1.1-DEC03 Life Cycle?
ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility
ITAM-1.1.2 Validate Refresh Data
ITAM-1.1.3 Analyze Data at National Level
ITAM-1.1.4 Submit ITARS Request
ITAM-1.1.5 Make Budget Decision
ITAM-1.1.5-DEC01 Continue?
ITAM-1.1.6 Define Specifications for Equipment
ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS
ITAM-1.1.8 Execute Procurement
ITAM-1.1.9 Communicate Asset Management Purchase to the Field
ITAM-1.2 Regional Buys (Activations)
ITAM-1.2-DEC01 Special Funding
ITAM-1.2.1 Identify New Activation Projects
ITAM-1.2.2 Determine Activation Scope
ITAM-1.2.3 Open Activation Request
ITAM-1.2.4 Notify Regional Activation Team
ITAM-1.2.5 Submit ITARS Request
ITAM-1.2.6 Review Specifications for Equipment
ITAM-1.2.7 Submit Request to Purchase
ITAM-1.2.8 Refine Order
ITAM-1.2.8.1 Define Procurement / Delivery Requirements
ITAM-1.2.8.2 Refine Network Design
ITAM-1.2.8.3 Refine Wireless Network
ITAM-1.2.8.4 Refine Telephone System
ITAM-1.2.8.5 Refine Server Order
ITAM-1.2.8.6 Refine PC Order
ITAM-1.2.8.7 Refine Printer & Scanner Order
ITAM-1.2.8.8 Refine Laptop Order
ITAM-1.2.8.9 Refine Content Delivery Engine
ITAM-1.2.8.10 Refine Telecommunication Requirements
ITAM-1.2.9 Communicate Asset Management Purchase to the Field
ITAM-1.3 Local Procurement Purchases
ITAM-1.3.1 Gather Business Line Requirements
ITAM-1.3.1-DEC01 Special Funding?
ITAM-1.3.1-DEC02 Activation?

ITAM-1.3.2 Execute Special Funding
ITAM-1.3.2.1 Prioritize Projects
ITAM-1.3.2.2 Determine Procurement Plan
ITAM-1.3.2.2-DEC01 Facility Buy?
ITAM-1.3.2.3 Identify Funded Facility Requirements
ITAM-1.3.2.4 Identify Funded SLM Requirements
ITAM-1.3.2.5 Submit ITARS Request
ITAM-1.3.2.5-DEC01 ITARS Approved?
ITAM-1.3.2.6 Create and Submit IFCAP 2237
ITAM-1.3.2.7 Approve ICAP 2237
ITAM-1.3.2.7-DEC01 Approve?
ITAM-1.3.2.8 Submit IFCAP 2237 to Purchasing
ITAM-1.3.3 Execute Break - Fix
ITAM-1.3.4 Develop Activation Projects
ITAM-1.3.4.1 Identify Local Projects
ITAM-1.3.4.2 Solicit Local VA Leadership Input
ITAM-1.3.4.3 Provide Feedback
ITAM-1.3.4.4 Determine Activation Meets Requirements Definition
ITAM-1.3.4.4-DEC01 Activations?
ITAM-2 Deploy and Manage IT Assets
ITAM-2.1 Receive Notification of Incoming Shipment
ITAM-2.1.1 Notify Logistics of Pending Shipments
ITAM-2.1.2 Resolve Split Delivery Dates
ITAM-2.2 Manage Receipt of Assets in Logistics
ITAM-2.2-DEC01 Hold in Logistics
ITAM-2.2.1 Verify Invoice and Equipment
ITAM-2.2.2 Identify Components
ITAM-2.2.3 Identify and Record Serial Numbers
ITAM-2.2.4 Produce NX Catalog Validation Report
ITAM-2.2.5 Count Assets to Match Receiving Documents
ITAM-2.2.6 Notify GIP of Consumables
ITAM-2.2.7 Prepare Barcode Label
ITAM-2.2.8 Validate Barcode Label
ITAM-2.2.9 Crosscheck Barcode Label to Equipment
ITAM-2.3 Manage Assets in Storage
ITAM-2.3.1 Receive Equipment from Logistics
ITAM-2.3.2 Obtain Secure Storage Space
ITAM-2.3.3 Limit Access to Storerooms
ITAM-2.3.4 Scan Equipment Into Storage
ITAM-2.3.5 Perform Periodic Inventory Scans
ITAM-2.3.6 Prepare Deployment Plan
ITAM-2.4 Prepare Assets for Deployment
ITAM-2.4.1 Scan for Deployment to Staging Area
ITAM-2.4.2 Validate Updated Location
ITAM-2.5 Manage Deployed Assets
ITAM-2.5.1 Remove Assets from Storage

ITAM-2.5.2 Update Location Records
ITAM-2.5.2-DEC01 Mobile / Loaned Equipment?
ITAM-2.5.3 Obtain End-User Signature
ITAM-2.5.4 Deploy Asset
ITAM-3 Monitor IT Assets
ITAM-3.1 Verify Inventory Data Records
ITAM-3.2 Monitor Inventory Process
ITAM-3.2.1 Prepare Inventory Schedule
ITAM-3.2.2 Conduct Annual Inventory Scans
ITAM-3.3 Track Movement of Non-Expendable Assets
ITAM-3.4 Receive Notification of Annual Inventory
ITAM-3.5 Perform Annual Inventory Reconciliation
ITAM-3.5.1 Produce Exception Listing
ITAM-3.5.2 Reconcile Exception Listing
ITAM-3.5.3 Perform Annual Inventory
ITAM-3.5.3-DEC01 Missing Equipment?
ITAM-3.5.4 Generate Report of Survey Form
ITAM-3.5.5 Submit EIL
ITAM-3.5.6 Perform 5% Verification
ITAM-3.6 Monitor Perpetual Inventory Process
ITAM-4 Dispose IT Assets
ITAM-4.1 Prepare Equipment for Turn-In
ITAM-4.1-DEC01 Electronic Media
ITAM-4.2 Sanitize Equipment
ITAM-4.3 Submit Electronic Turn-In Request
ITAM-4.4 Validate Turn-In Date
ITAM-4.5 Coordinate Transfer to Logistics
ITAM-4-6 Remove Equipment from EIL

IT Asset Management Description and Goals

Description

This process defines the best in class methodology for deploying and tracking Information Technology equipment that maximizes the value of VA assets while improving inventory accuracy and reducing cost.

Goals

The goal of the Information Technology Asset Management (ITAM) process is to define the best in class methodology for acquiring, deploying and tracking equipment that maximizes the value of VA assets while improving inventory accuracy and reducing cost.

Specifically the process:

- Provides a clear and concise standard process from acquisition to disposal

- Conforms to applicable Federal and VA policies and directives

- Utilizes industry best practices adapted to the VA environment

- Captures and integrates needed technical and financial information

- Drives the organization to adopt the same standard process at every VA location

- Utilizes applicable metrics to drive continuous improvement

IT Asset Management RACI Information

The following describes the RACI information for this process:

ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

Responsible Role: Facility Chief Information Officer

Accountable Role: Technology Management

ITAM-1.1.2 Validate Refresh Data

Responsible Role: Regional Director

Accountable Role: Technology Management

ITAM-1.1.3 Analyze Data at National Level

Responsible Role: Project Manager

Accountable Role: VISN Chief Information Officer

ITAM-1.1.4 Submit ITARS Request

Responsible Role: Project Manager

Accountable Role: VISN Chief Information Officer

ITAM-1.1.5 Make Budget Decision

Responsible Role: Project Manager

Accountable Role: VISN Chief Information Officer

ITAM-1.1.6 Define Specifications for Equipment

Responsible Role: Integrated Product Team

Accountable Role: Technology Management

ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

Responsible Role: Integrated Product Team

Accountable Role: Facility Chief Information Officer

Consulted Role: Logistics Staff

ITAM-1.1.8 Execute Procurement

Responsible Role: Integrated Product Team

Accountable Role: Technology Management

ITAM-1.1.9 Communicate Asset Management Purchase to the Field

Responsible Role: Project Manager

Accountable Role: VISN Chief Information Officer

ITAM-1.2.1 Identify New Activation Projects

Responsible Role: Facility Chief Information Officer

Accountable Role: Regional Director

ITAM-1.2.2 Determine Activation Scope

Responsible Role: Facility Chief Information Officer

Accountable Role: Regional Director

ITAM-1.2.3 Open Activation Request

Responsible Role: Facility Chief Information Officer

Accountable Role: Regional Director

ITAM-1.2.4 Notify Regional Activation Team

Responsible Role: Facility Chief Information Officer

Accountable Role: Regional Director

Informed Role: Integrated Product Team

ITAM-1.2.5 Submit ITARS Request

Responsible Role: Facility Chief Information Officer
Accountable Role: Regional Director

ITAM-1.2.6 Review Specifications for Equipment

Responsible Role: Integrated Product Team
Accountable Role: Facility Chief Information Officer
Informed Role: Regional Acquisition Team

ITAM-1.2.7 Submit Request to Purchase

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.2 Refine Network Design

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.3 Refine Wireless Network

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director

Informed Role: Facility Chief Information Officer

ITAM-1.2.8.4 Refine Telephone System

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.5 Refine Server Order

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.6 Refine PC Order

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.7 Refine Printer & Scanner Order

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.8 Refine Laptop Order

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.2.8.9 Refine Content Delivery Engine

Responsible Role: Regional Acquisition Team

Accountable Role: Regional Director

Informed Role: Facility Chief Information Officer

ITAM-1.2.8.10 Refine Telecommunication Requirements

Responsible Role: Regional Acquisition Team

Accountable Role: Regional Director

Informed Role: Facility Chief Information Officer

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Responsible Role: Regional Acquisition Team

Accountable Role: VISN Chief Information Officer

ITAM-1.3.1 Gather Business Line Requirements

Responsible Role: Facility Chief Information Officer

Accountable Role: VISN Chief Information Officer

ITAM-1.3.2.1 Prioritize Projects

Responsible Role: Facility Chief Information Officer

Accountable Role: Regional Director

ITAM-1.3.2.2 Determine Procurement Plan

Responsible Role: Regional Director

Accountable Role: VISN Chief Information Officer

ITAM-1.3.2.3 Identify Funded Facility Requirements

Responsible Role: Regional Director

Accountable Role: VISN Chief Information Officer

ITAM-1.3.2.4 Identify Funded SLM Requirements

Responsible Role: Regional Director
Accountable Role: VISN Chief Information Officer

ITAM-1.3.2.5 Submit ITARS Request

Responsible Role: Facility Chief Information Officer
Accountable Role: Regional Director

ITAM-1.3.2.6 Create and Submit IFCAP 2237

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Consulted Role: Facility Chief Information Officer

ITAM-1.3.2.7 Approve ICAP 2237

Responsible Role: Approving Official
Accountable Role: Regional Director
Informed Role: Facility Chief Information Officer

ITAM-1.3.2.8 Submit IFCAP 2237 to Purchasing

Responsible Role: Regional Acquisition Team
Accountable Role: Regional Director
Informed Role: Approving Official

ITAM-1.3.3 Execute Break - Fix

Responsible Role: Facility Chief Information Officer
Accountable Role: VISN Chief Information Officer
Consulted Role: Technology Management

ITAM-1.3.4.1 Identify Local Projects

Responsible Role: Facility Chief Information Officer
Accountable Role: VISN Chief Information Officer

ITAM-1.3.4.2 Solicit Local VA Leadership Input

Responsible Role: Facility Chief Information Officer
Accountable Role: VISN Chief Information Officer

ITAM-1.3.4.3 Provide Feedback

Responsible Role: Local VA Leadership
Accountable Role: Facility Chief Information Officer

ITAM-1.3.4.4 Determine Activation Meets Requirements Definition

Responsible Role: Facility Chief Information Officer
Accountable Role: Deputy Assistant Secretary/Deputy Chief Information Officer

ITAM-2.1.1 Notify Logistics of Pending Shipments

Responsible Role: Facility Chief Information Officer
Accountable Role: IT Asset Manager
Informed Role: IT Staff, Logistics Officer, Logistics Staff

ITAM-2.1.2 Resolve Split Delivery Dates

Responsible Role: IT Asset Manager
Accountable Role: Facility Chief Information Officer
Informed Role: Logistics Officer, Logistics Staff, IT Staff

ITAM-2.2.1 Verify Invoice and Equipment

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Facility Chief Information Officer, Logistics Officer

ITAM-2.2.2 Identify Components

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Facility Chief Information Officer, Logistics Staff

ITAM-2.2.3 Identify and Record Serial Numbers

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Logistics Officer, Facility Chief Information Officer

ITAM-2.2.4 Produce NX Catalog Validation Report

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Logistics Officer, Facility Chief Information Officer

ITAM-2.2.5 Count Assets to Match Receiving Documents

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Logistics Officer, Facility Chief Information Officer

ITAM-2.2.6 Notify GIP of Consumables

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: IT Staff

Informed Role: Logistics Officer, Logistics Staff

ITAM-2.2.7 Prepare Barcode Label

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Informed Role: IT Staff, Logistics Officer, Facility Chief Information Officer

ITAM-2.2.8 Validate Barcode Label

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Informed Role: IT Staff, Logistics Officer, Facility Chief Information Officer

ITAM-2.2.9 Crosscheck Barcode Label to Equipment

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Logistics Staff, IT Staff, Logistics Officer

ITAM-2.3.1 Receive Equipment from Logistics

Responsible Role: IT Staff

Accountable Role: IT Asset Manager

Informed Role: Logistics Officer, Logistics Staff, Facility Chief Information Officer

ITAM-2.3.2 Obtain Secure Storage Space

Responsible Role: Facility Chief Information Officer

Accountable Role: IT Asset Manager

Consulted Role: IT Staff

Informed Role: Law Enforcement, Logistics Officer, Logistics Staff, Information Security Officer

ITAM-2.3.3 Limit Access to Storerooms

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Law Enforcement, IT Staff, Information Security Officer

ITAM-2.3.4 Scan Equipment Into Storage

Responsible Role: IT Staff

Accountable Role: IT Asset Manager

ITAM-2.3.5 Perform Periodic Inventory Scans

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: IT Staff

ITAM-2.3.6 Prepare Deployment Plan

Responsible Role: Facility Chief Information Officer

Accountable Role: IT Asset Manager

Informed Role: IT Staff, Logistics Officer

ITAM-2.4.1 Scan for Deployment to Staging Area

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: IT Staff

ITAM-2.4.2 Validate Updated Location

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: IT Staff

ITAM-2.5.1 Remove Assets from Storage

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Informed Role: IT Staff, Logistics Officer, Facility Chief Information Officer

ITAM-2.5.2 Update Location Records

Responsible Role: IT Staff

Accountable Role: IT Asset Manager

Informed Role: Logistics Officer, Logistics Staff, Facility Chief Information Officer

ITAM-2.5.3 Obtain End-User Signature

Responsible Role: IT Staff

Accountable Role: Facility Chief Information Officer

Informed Role: IT Asset Manager

ITAM-2.5.4 Deploy Asset

Responsible Role: IT Staff

Accountable Role: IT Asset Manager

Informed Role: Facility Chief Information Officer

ITAM-3.1 Verify Inventory Data Records

Responsible Role: Logistics Staff

Accountable Role: Facility Chief Information Officer

Informed Role: IT Staff, IT Asset Manager, Logistics Officer

ITAM-3.2.1 Prepare Inventory Schedule

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: Logistics Staff

Informed Role: IT Staff, Logistics Officer

ITAM-3.2.2 Conduct Annual Inventory Scans

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: Logistics Staff

Informed Role: IT Staff, Logistics Officer

ITAM-3.3 Track Movement of Non-Expendable Assets

Responsible Role: IT Staff

Accountable Role: IT Asset Manager

Consulted Role: Logistics Staff

Informed Role: Logistics Officer, Facility Chief Information Officer

ITAM-3.4 Receive Notification of Annual Inventory

Responsible Role: IT Custodial Officer

Accountable Role: VISN Chief Information Officer

ITAM-3.5.1 Produce Exception Listing

Responsible Role: Logistics Staff

Accountable Role: Facility Chief Information Officer

Consulted Role: IT Staff

Informed Role: IT Asset Manager, Logistics Officer

ITAM-3.5.2 Reconcile Exception Listing

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Logistics Officer, Logistics Staff, IT Staff

ITAM-3.5.3 Perform Annual Inventory

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: IT Staff

ITAM-3.5.4 Generate Report of Survey Form

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: Logistics Staff

Informed Role: Law Enforcement, IT Staff, Logistics Officer, Information Security Officer

ITAM-3.5.5 Submit EIL

Responsible Role: Facility Chief Information Officer

Accountable Role: IT Asset Manager

Informed Role: Law Enforcement, Logistics Officer, Logistics Staff, IT Staff, Information Security Officer

ITAM-3.5.6 Perform 5% Verification

Responsible Role: Logistics Staff

Accountable Role: Logistics Officer

Consulted Role: Facility Chief Information Officer

Informed Role: IT Staff, IT Asset Manager

ITAM-3.6 Monitor Perpetual Inventory Process

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Logistics Staff, IT Staff, Information Security Officer

ITAM-4.1 Prepare Equipment for Turn-In

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Logistics Staff, IT Staff, Information Security Officer

ITAM-4.2 Sanitize Equipment

Responsible Role: IT Staff

Accountable Role: Facility Chief Information Officer

Consulted Role: Information Security Officer, 508 Reviewer

Informed Role: Logistics Officer, Logistics Staff, IT Asset Manager

ITAM-4.3 Submit Electronic Turn-In Request

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Consulted Role: 508 Reviewer

Informed Role: Logistics Officer, Logistics Staff, IT Staff

ITAM-4.4 Validate Turn-In Date

Responsible Role: IT Asset Manager

Accountable Role: Logistics Staff

Informed Role: IT Staff, Logistics Officer, Facility Chief Information Officer

ITAM-4.5 Coordinate Transfer to Logistics

Responsible Role: IT Asset Manager

Accountable Role: Facility Chief Information Officer

Informed Role: Logistics Officer, Logistics Staff, IT Staff

ITAM-4-6 Remove Equipment from EIL

Responsible Role: Logistics Staff

Accountable Role: IT Asset Manager

Informed Role: IT Staff, Logistics Officer, Information Security Officer, Facility Chief Information Officer

IT Asset Management Process

Process Activity Name: ITAM-1 Acquire IT Assets

Previous Process Activity

None

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1 Acquire IT Assets cycles through the following dependent activities:

- ITAM-1.1 National Buys

- ITAM-1.2 Regional Buys (Activations)

- ITAM-1.3 Local Procurement Purchases

Process Activity Name: ITAM-1-DEC01 National Buy?

Previous Process Activity

None

Next Process Activity

If yes, ITAM 1.1 National Buys

Or

If no, ITAM-1-DEC02 Regional Buy?

Description

There is a decision dependency that determines the next activity to complete.

If this is a National Buy the next activity to complete is ITAM-1.1 National Buy.

If this is not a National Buy proceed to the next decision dependency to determine the next step to complete.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1-DEC02 Regional Buy?

Previous Process Activity

ITAM-1-DEC01 National Buy?

Next Process Activity

If Yes, ITAM-1.2 Regional Buys (Activations)

Or

If No, ITAM-1.3 Local Procurement Purchases

Description

There is a decision dependency that determines the next activity to complete.

If this is a Regional Buy the next activity to complete is ITAM-1.2 Regional Buys (Activations)

If this is not a Regional Buy the next activity to complete is ITAM-1.3 Local Procurement Purchases.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM 1.1 National Buys

Previous Process Activity

ITAM-1-DEC01 National Buy?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1.1 National Buys cycles through the following dependent activities:

- ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

- ITAM-1.1.2 Validate Refresh Data

- ITAM-1.1.3 Analyze Data at National Level

- ITAM-1.1.4 Submit ITARS Request

- ITAM-1.1.5 Make Budget Decision

- ITAM-1.1.6 Define Specifications for Equipment

- ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

- ITAM-1.1.8 Execute Procurement

- ITAM-1.1.9 Communicate Asset Management Purchase to the Field

Process Activity Name: ITAM-1.1-DEC01 Special Funding?

Previous Process Activity

ITAM-1-DEC01 National Buy?

Next Process Activity

If yes, ITAM-1.3.2 Execute Special Funding

Or

If no, ITAM-1.1-DEC02 Input Required?

Description

There is a decision dependency that determines the next activity to complete.

If this is a Special Funding purchase the next activity to complete is ITAM-1.3.2 Execute Special Funding.

If this is not a Special Funding purchase proceed to the next decision dependency to determine the next activity to complete.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.1-DEC02 Input Required?

Previous Process Activity

ITAM-1.1-DEC01 Special Funding?

Next Process Activity

If yes, ITAM-1.1-DEC03 Life Cycle

Or

If no, ITAM-1.1.3 Analyze Data at National Level

Description

There is a decisions dependency that determines the next activity to complete.

If additional input is required proceed to the next decision dependency to determine the next activity to complete.

If additional input is not required the next activity to complete is ITAM-1.1.3 Analyze Data at National Level.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.1-DEC03 Life Cycle?

Previous Process Activity

ITAM-1.1-DEC02 Input Required?

Next Process Activity

If yes, ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

Or

If no, ITAM-1.1.3 Analyze Data at National Level

Description

There is a decision dependency that determines the next activity to complete.

If this is a life cycle purchase the next activity to complete is ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

If this is not a life cycle purchase the next activity to complete is ITAM-1.1.3 Analyze Data at National Level

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

Previous Process Activity

DEC-1.1-DEC03 Life Cycle?

Next Process Activity

ITAM-1.1.2 Validate Refresh Data

Description

The Facility Chief Information Officer analyzes inventory by commodity type to determine assets suitable for refresh based on functionality and use status, (Operating System (OS) Compatibility, Ram, and Disk Space).

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Data
Facility Strategic Plan
OIT Strategic Plan
VA Strategic Plan
Visibility Tools i.e. (System Center Configuration Manager (SCCM) and Tivoli Endpoint Manager (TEM))

Artifacts Created

Spreadsheet containing assets meeting refresh criteria

Responsible Role

Facility Chief Information Officer

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA Capital Assessment Process

VA IT Inventory Compliance (IIC) Portal

VA IT Inventory Control Knowledge Center

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Refresh buys are designed to replace equipment that is non-functional, that is not fully optimized, or incompatible with the VA baseline configurations.

Process Activity Name: ITAM-1.1.2 Validate Refresh Data

Previous Process Activity

ITAM-1.1.1 Analyze Inventory by Functionality and Compatibility

Next Process Activity

ITAM-1.1.3 Analyze Data at National Level

Description

The Regional Director validates the refresh data provided by the Facility Chief Information Officer.

Artifacts Used

Facility Strategic Plan
Spreadsheet containing assets meeting refresh criteria
VA Strategic Plan
Visibility Tools (i.e. System Center Configuration Manager (SCCM) and Tivoli Endpoint Manager (TEM))

Artifacts Created

Validated Spreadsheet containing assets meeting refresh criteria

Responsible Role

Regional Director

Tools and Websites

VA Capital Assessment Process

VA IT Inventory Control Knowledge Center

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.1.3 Analyze Data at National Level

Previous Process Activity

ITAM-1.1-DEC02 Input Required?

Or

ITAM-1.1-DEC03 Life Cycle?

Or

ITAM-1.1.2 Validate Refresh Data

Next Process Activity

ITAM-1.1.4 Submit ITARS Request

Description

The Project Manager, or designated Business Owner, analyzes the Data for National Purchases for both Life Cycle and all other purchases being recommended and produces the Capital Asset Planning Survey.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Data by CSN
Current Capital Asset Planning Survey
Facility Strategic Plan
System Center Configuration Manager SCCM Data (Microsoft Asset Management Tool)
VA Strategic Plan

Artifacts Created

Capital Asset Planning Survey

Responsible Role

Project Manager

Tools and Websites

VA Capital Assessment Process

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Replacement equipment should not be based only on age, but also on functionality and compatibility with approved tools and software.

Process Activity Name: ITAM-1.1.4 Submit ITARS Request

Previous Process Activity

ITAM-1.1.3 Analyze Data at National Level

Next Process Activity

ITAM-1.1.5 Make Budget Decision

Description

The Project Manager, or designated Business Owner, submits the Information Technology Acquisition Request System (ITARS).

Artifacts Used

Budget
Integrated Product Team Budget Data

Artifacts Created

ITARS Request

Responsible Role

Project Manager

Tools and Websites

Information Technology Acquisition Request System (ITARS)

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Technology Management group is not the only office who submits ITARS requests. The One-VA Technical Reference Model is used for key equipment specifications for the ITARS Request.

Process Activity Name: ITAM-1.1.5 Make Budget Decision

Previous Process Activity

ITAM-1.1.4 Submit ITARS Request

Next Process Activity

ITAM-1.1.5-DEC01 Continue?

Description

The Project Manager, or designated Business Owner, makes a budget decision to continue or to end at this point if the decision is made that the budget does not support the acquisition. If the decision is to continue the Project Manager forms an Integrated Product Team of Subject Matter Experts to work on the process of defining equipment Requirements.

Artifacts Used

Analyzed Capital Asset Planning Survey
Budget

Artifacts Created

Integrated Product Team Budget Data
Updated Budget

Responsible Role

Project Manager

Tools and Websites

VA Capital Assessment Process

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.1.5-DEC01 Continue?

Previous Process Activity

ITAM-1.1.5 Make Budget Decision

Next Process Activity

If yes, the following activities are completed concurrently:

- ITAM-1.1.6 Define Specifications for Equipment

- ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

Or

If no, the process ends.

Description

There is a dependency that determines the next activity to complete.

If the Project Manager makes the Budget Decision to continue the next activities are completed concurrently:

- ITAM-1.1.6 Define Specifications for Equipment

- ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

If the Project Manager makes the Budget Decision to not continue the process ends.

Responsible Role

Project Manager

Process Activity Name: ITAM-1.1.6 Define Specifications for Equipment

This activity is completed concurrently with the following activity:

- ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

Previous Process Activity

ITAM-1.1.5-DEC01 Continue?

Next Process Activity

The following activities are completed concurrently:

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Description

The Integrated Product Team uses the One VA Technical Reference Model and Subject Matter Experts to define equipment specifications. The specifications are reviewed by Enterprise System Engineering and are also used in the development of the Statement of Work submitted to the Technical Acquisitions Center.

The Project Manager's ensure that certain requirements are included with the Performance Work Statement (PWS) to ensure contractors comply with guidelines for delivery and receipt of equipment.

Artifacts Used

Analyzed Capital Asset Planning Survey
Integrated Product Team Budget Data
Performance Work Statement
Spreadsheet containing assets meeting refresh criteria

Updated Budget

Artifacts Created

Equipment Specifications
Update Performance Work Statement

Responsible Role

Integrated Product Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

Information Technology Receiving Support System (ITRSS) Portal

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

Systems Engineering and Design Review (SEDR) Process

VA Acquisition Regulation (VAAR)

More Info

Technical Analysis Review/Technical Analysis Summary has been changed to Systems Engineering and Design Review. In addition, certain requirements need to be included such as, requiring vendor to include the Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Order (PO) and Project Description on all Packing Slips, no partial deliveries, and a requirement to make positive contact with the warehouse prior to shipment to ensure available space at the warehouse.

The contractor maintains an electronic list of all delivered equipment by serial number, noting delivery location, Purchase Order number and individual that signs for the equipment. Delivery location will include the Region number, VISN number, station number, street address, city and state. The electronic list will be provided in a file with one serial number per line in a standard format such as excel, or quote and comma delimited format. Contractor will provide the list via electronic mail after receipt of the equipment by the site. The list will be sent to the site POC and additional VA staff identified at the time the order is placed.

Process Activity Name: ITAM-1.1.7 Define ITAM/Logistic Requirements within PWS

This activity is completed concurrently with the following activity:

ITAM-1.1.6 Define Specifications for Equipment

Previous Process Activity

ITAM-1.1.5-DEC01 Continue?

Next Process Activity

The following activities are completed concurrently:

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Description

The Integrated Product Team ensures that certain requirements are included with the Project Work Statement (PWS) to ensure contractors comply with guidelines for delivery and receipt of equipment. In addition to an understandable, itemized summary of the equipment being procured, every centralized IT procurement contract needs to contain a standard, mandatory deliverable: a detailed list of non-expendable equipment provided by the contract (in an Excel spreadsheet). Ideally, providing a spreadsheet in advance of each batch of equipment being delivered and a summary spreadsheet at the conclusion of the contract – including any equipment warranty swaps encountered during roll-out. At a minimum: purchase order number, Contract Line Item Number (CLIN), station number, serial number, manufacturer, model number, total cost of each item, delivery date, and warranty end date. With this detailed list of information, invoices and property records can be validated very easily after each batch is shipped. At the conclusion of the project, we can ensure that all non-expendable property has been entered correctly.

It is essential that the Integrated Project Team for centralized procurements (i.e., lifecycle replacement procurements) publish and update a Master Delivery Schedule that summarizes the number of items of equipment that will be delivered to each Facility. This will also help with the receiving process and invoice certification.

Artifacts Used

Analyzed Capital Asset Planning Survey
Integrated Product Team Budget Data
Performance Work Statement
Updated Budget

Artifacts Created

Equipment Specifications
Reviewed Performance Work Statement

Responsible Role

Integrated Product Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

Information Technology Receiving Support System (ITRSS) Portal

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

Systems Engineering and Design Review (SEDR) Process

VA Acquisition Regulation (VAAR)

More Info

The contractor maintains an electronic list of all delivered equipment by serial number, noting delivery location, Purchase Order number and individual that signs for the equipment. Delivery location will include the Region number, VISN number, station number, street address, city and state. The electronic list will be provided in a file with one serial number per line in a standard format such as excel, or quote and comma delimited format. Contractor will provide the list via electronic mail after receipt of the equipment by the site. The list will be sent to the site POC and additional VA staff identified at the time the order is placed.

Contractors shall coordinate deliveries with Site POCs before shipment of all shipments to ensure sites have adequate storage space prior to shipping, Contractor (prime) shall notify the Delivery Date Coordinator and the respective Site POCs, by phone followed by email, of all incoming deliveries including line-by-line details for review of requirements. VA Project Manager, Implementation Manager, and COR shall be copied on all email communication to sites. Contractor cannot make any changes to the delivery quantities or schedule at the request of Site POC other than the ability of the site to ask that their shipments be broken up into no more than three partial deliveries.

All shipments, either single or multiple container deliveries, will bear the VA Purchase Order number on external shipping labels and associated manifests or packing lists. In the case of multiple container deliveries, a statement readable near the VA PO number will indicate total number of containers for the complete shipment (ex. "Package 1 of 2"), clearly readable on manifests and external shipping labels.

Process Activity Name: ITAM-1.1.8 Execute Procurement

Previous Process Activity

The following activities are completed concurrently.

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Next Process Activity

ITAM-1.1.9 Communicate Asset Management Purchase to the

Field

Description

The Integrated Product Team, or designated Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Requestor, after reviewing the Technical Acquisition Center Proposal from the Statement of Work, executes the procurement and sends status information to the Project Manager

Artifacts Used

Equipment Specifications
Notification of ITARS approval (Verbal or Written)
Statement of Work
Technical Acquisition Center Proposal

Artifacts Created

IFCAP 2237 - Request, Turn-in and Request for Property or Services
Integrated Funds Control, Accounting, and Procurement Records
Reviewed Statement of Work
Reviewed Technical Acquisition Center Proposal

Responsible Role

Integrated Product Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

Systems Engineering and Design Review (SEDR) Process

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.1.9 Communicate Asset Management Purchase to the Field

Previous Process Activity

ITAM-1.1.8 Execute Procurement

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The Project Manager, or designee, communicates to both OIT and Logistics the asset management component to any equipment buy.

Artifacts Used

Award Document including Warranty Information
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Order

Artifacts Created

IT Procurement Bulletin

Responsible Role

Project Manager

Tools and Websites

Information Technology Acquisition Request System (ITARS)

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

The IT Procurement Bulletin Containing Asset Management Component of the IT Buy needs to contain at a minimum the following information: A description of the project, IFCAP Purchase Order listing unit prices for each Contract Line Item Number, Category Stock Number, Common Model Number, Equipment Category, delivery schedule including quantities and shipping time frames.

Process Activity Name: ITAM-1.2 Regional Buys (Activations)

Previous Process Activity

ITAM-1-DEC02 Regional Buy?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1.2 Regional Buys (Activations) cycles through the following dependent activities.

- ITAM-1.2.1 Identify New Activation Projects

- ITAM-1.2.2 Determine Activation Scope

- ITAM-1.2.3 Open Activation Request

- ITAM-1.2.4 Notify Regional Activation Team

- ITAM-1.2.5 Submit ITARS Request

- ITAM-1.2.6 Review Specifications for Equipment

- ITAM-1.2.7 Submit Request to Purchase

- ITAM-1.2.8 Refine Order

- ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Process Activity Name: ITAM-1.2-DEC01 Special Funding

Previous Process Activity

ITAM-1-DEC02 Regional Buy?

Next Process Activity

If yes, ITAM-1.3.2 Execute Special Funding.

If no, ITAM-1.2.2 Determine Activation Scope.

Description

There is a decision dependency that determines the next activity to complete.

If this is Special Funding purchase, the next activity to complete is ITAM-1.3.2 Execute Special Funding.

If this is not a Special Funding purchase, proceed to the next decision diamond to determine the next activity to complete.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.2.1 Identify New Activation Projects

Previous Process Activity

ITAM-1.2-DEC01 Special Funding?

Next Process Activity

ITAM-1.2.2 Determine Activation Scope

Description

The Facility Chief Information Officer works with the Regional Service Line Subject Matter Experts, or their designee, along with local VA leadership to identify New Activation Projects. All IT buys must adhere to the requirements listed in the One-VA Technical Reference Model (TRM). The following areas are addressed when determining activation projects:

Determine Network Design

Determine Wireless Network

Determine Telephone Systems

Determine Server Needs

Determine PC Needs

Determine Laptop Needs

Determine Printer & Scanner Needs

Determine Content Delivery Engine

Determine Telecommunications Requirements

Artifacts Used

Activation Requests
Approved Activation Number for Major and Minor Construction Projects
Email Memos
Meeting Minutes

Artifacts Created

Approved Activation Tracking List
Updated Email Memos

Responsible Role

Facility Chief Information Officer

Tools and Websites

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Activation Requests serve as a vehicle for OI&T to obtain approval and begin procurement stages which includes endpoint devices and infrastructure to support new staff. OI&T Activation Requests are defined as the method in which administrations work with OI&T field managers to provide IT support to the opening of new clinics, remodeling non-clinical to clinical space (i.e.: new exam rooms), expanded services and Full-Time Equivalent Employee (FTEE) growth. An approved VHA activation number is required for major and minor construction projects.

Examples of what is not an activation include:

- Remodeling with no increase in FTEE or usable square footage

- Replacement of equipment

- Innovation projects

- Moving from one location to another

- Creating a pool of spare equipment

Process Activity Name: ITAM-1.2.2 Determine Activation Scope

Previous Process Activity

ITAM-1.2.1 Identify New Activation Projects

Next Process Activity

ITAM-1.2.3 Open Activation Request

Description

The Facility Chief Information Officer (FCIO) works with the Regional Service Line Subject Matter Experts along with the IT Asset Manager, Network Chief Information Officer (NCIO), and Local VA Leadership determine scope of IT Support needed, for the activation projects, based on the number of Full Time Equivalent Employees (FTEE's) and completes an Equipment List needed to support the FTEE's.

Artifacts Used

Approved Activation Tracking List
Floor Plans
Statement of Work

Artifacts Created

New Entry in Approved Activation Tracking List

Responsible Role

Facility Chief Information Officer

Tools and Websites

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.2.3 Open Activation Request

Previous Process Activity

ITAM-1.2.2 Determine Activation Scope

Next Process Activity

ITAM-1.2.4 Notify Regional Acquisition Team

Description

The Facility Chief Information Officer (FCIO) opens the Activation Request and secures a project number for the Activations. (Note: an outcome of opening the Activation Request is to form the Activation Team to work the activations.)

Artifacts Used

Approved Activation Tracking List
Data Call
Statement of Work

Artifacts Created

Activation Team
Activation Web Form
Collection of Activations by Quarter
Project Number

Responsible Role

Facility Chief Information Officer

Tools and Websites

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Every Region has their own Request Portal. There is no centralized Request Portal.

The FCIO is a member of the Activation Team(s) that are created for each activation project.

Process Activity Name: ITAM-1.2.4 Notify Regional Activation Team

Previous Process Activity

ITAM-1.2.3 Open Activation Request

Next Process Activity

ITAM-1.2.5 Submit ITARS Request

Description

The Facility Chief Information Officer notifies the Veterans Integrated Service Network CIO, the Regional Director or designee, and the Regional Activation Team of any activation request via the Activation Web Form and Project Number.

An Integrated Product Team is developed to conduct an analysis of the major acquisitions.

Artifacts Used

Activation Web Form
Collection of Activations by Quarter
Data Call
Project Number

Artifacts Created

Notification of Activation Web Form
Notification of Project Number

Responsible Role

Facility Chief Information Officer

Tools and Websites

One-VA Technical Reference Model

Request Portal

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Every Region has their own Request Portal. There is no centralized Request Portal.

Process Activity Name: ITAM-1.2.5 Submit ITARS Request

Previous Process Activity

ITAM-1.2.4 Notify Regional Acquisition Team

Next Process Activity

ITAM-1.2.6 Review Specifications for Equipment

Description

The Facility Chief Information Officer submits the Information Technology Acquisition Request System (ITARS) request to the Integrated Product Team for review.

Artifacts Used

Budget
Collection of Activations by Quarter
Data Call

Artifacts Created

ITARS Request

Responsible Role

Facility Chief Information Officer

Tools and Websites

Information Technology Acquisition Request System (ITARS)

One-VA Technical Reference Model

Request Portal

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The FCIO uses the Collection of Activations by Quarter and other Request Portal information from the region for data needed for the ITARS Request. The One-VA Technical Reference Model is a key source of data for equipment specifications.

Every Region has their own Request Portal. There is no centralized Request Portal.

Process Activity Name: ITAM-1.2.6 Review Specifications for Equipment

Previous Process Activity

ITAM-1.2.5 Submit ITARS Request

Next Process Activity

ITAM-1.2.7 Submit Request to Purchase

Description

The Integrated Product Team reviews the Specifications for Equipment contained in the Information Technology Acquisition Request System (ITARS) request to ensure all information required by the Technical Acquisition Center is included.

Artifacts Used

Analyzed Capital Asset Planning Survey
ITARS Request
Integrated Product Team Budget Data
Updated Budget

Artifacts Created

Reviewed ITARS Request

Responsible Role

Integrated Product Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

Information Technology Receiving Support System (ITRSS) Portal

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

Systems Engineering and Design Review (SEDR) Process

VA Acquisition Regulation (VAAR)

More Info

Certain requirements need to be included such as, requiring vendor to include the Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Order (PO) and Project Description on all Packing Slips, no partial deliveries, and a requirement to make positive contact with the warehouse prior to shipment to ensure available space at the warehouse.

Process Activity Name: ITAM-1.2.7 Submit Request to Purchase

Previous Process Activity

ITAM-1.2.6 Review Specifications for Equipment

Next Process Activity

The following activities are completed concurrently:

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Description

The Regional Acquisition Team reviews, approves, and submits a request to place the order to the acquisition group. The Region Activations Team is responsible for refining orders, with input from the Facility Chief Information Officer, as changes occur to the workforce in the region.

Artifacts Used

Collection of Activations by Quarter
Data Call
Information Technology Acquisition Request System Request

Artifacts Created

IFCAP 2237 - Request, Turn-in and Request for Property or Services
Updated Activated Projects

Responsible Role

Regional Acquisition Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

One-VA Technical Reference Model

Request Portal

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

Every Region has their own Request Portal. There is no centralized Request Portal.

The IFCAP 2237 - Request, Turn-in and Request for Property or Services artifact is located in the IFCAP Portal in Tools and Websites.

Process Activity Name: ITAM-1.2.8 Refine Order

Previous Process Activity

The following activities are completed concurrently:

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The sub-process ITAM-1.2.8 Refine Order cycles through the following dependent activities:

- ITAM-1.2.8.1 Define Procurement / Delivery Requirements

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Process Activity Name: ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Previous Process Activity

Note: The following activities are completed concurrently:

- Information Technology Acquisition Request System

- Contract Services Support

- Purchase

Next Process Activity

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Description

The Regional Acquisition Team, or designee, works with Subject Matter Experts to define procurement / delivery requirements. Certain requirements need to be included such as, requiring vendor to include the Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Order (PO) and Project Description on all Packing Slips, no partial deliveries, and a requirement to make positive contact with the warehouse prior to shipment to ensure available space at the warehouse.

Artifacts Used

Floor Plans
Full Time Equivalent Employee Info
IFCAP 2237 - Request, Turn-in and Request for Property or Services
Statement of Work

Artifacts Created

Procurement and Delivery Details

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

The Procurement and Deliver Details are communicated to Logistics and used to create Delivery Notifications for incoming shipments.

Process Activity Name: ITAM-1.2.8.2 Refine Network Design

Note: The following activities are completed concurrently:

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional LAN Teams, Regional Acquisition Teams, National Content Delivery Teams and Regional Telecommunications Business Office to refine the order for the Data Network to include: wireless network, telephone systems, servers, personal computers, laptops, printers and scanners, content delivery engine, and telecommunications requirements to include lead time information.

Artifacts Used

Floor Plans
Full Time Equivalent Employee Info
IFCAP 2237 - Request, Turn-in and Request for Property or Services
Statement of Work

Artifacts Created

Refined Network Design

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facility Chief Information Officer refines orders based on changes to the workforce in the region. Note: The Refined Network Design includes updated network equipment lists.

Process Activity Name: ITAM-1.2.8.3 Refine Wireless Network

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional LAN Team to refine the order for the wireless network equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Full Time Equivalent Employee Info
Regional LAN Template
Statement of Work

Artifacts Created

Refined Wireless Network Equipment Order (if applicable)

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.4 Refine Telephone System

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional LAN Team to refine the order for the telephone system equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Full Time Equivalent Employee Info
Regional VoIP Planning Form
Statement of Work

Artifacts Created

Refined Telephone System Equipment Order (if applicable)

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.5 Refine Server Order

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional LAN Team to refine the order for the server equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Full Time Equivalent Employee Info
Statement of Work

Artifacts Created

Refined Server Equipment List Order

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.6 Refine PC Order

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional LAN Team and the VA Points of Contacts to refine the order for the Personnel Computer (PC) equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Statement of Work

Artifacts Created

Refined Personnel Computer Equipment Order

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.7 Refine Printer & Scanner Order

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional Acquisition Team to refine the order for the printer and scanner equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Statement of Work

Artifacts Created

Refined Printer and Scanner Equipment Order

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.8 Refine Laptop Order

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional Acquisition Team to refine the order for the laptop equipment based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Statement of Work

Artifacts Created

Refined Laptop Equipment Needs Order

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.9 Refine Content Delivery Engine

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.10 Refine Telecommunication Requirements

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional Acquisition Team and sends an email request to the Content Delivery Network (CDN) approximately six months before the activation. The Content Delivery Network Team works with the FCIO and Acquisitions Group on configuring and shipping the device to meet the needs of the location.

Artifacts Used

Floor Plans
Statement of Work

Artifacts Created

Email to National CDN Team

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.8.10 Refine Telecommunication Requirements

Note: The following activities are completed concurrently:

- ITAM-1.2.8.2 Refine Network Design

- ITAM-1.2.8.3 Refine Wireless Network

- ITAM-1.2.8.4 Refine Telephone System

- ITAM-1.2.8.5 Refine Server Order

- ITAM-1.2.8.6 Refine PC Order

- ITAM-1.2.8.7 Refine Printer & Scanner Order

- ITAM-1.2.8.8 Refine Laptop Order

- ITAM-1.2.8.9 Refine Content Delivery Engine

Previous Process Activity

ITAM-1.2.8.1 Define Procurement / Delivery Requirements

Next Process Activity

ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Description

The Regional Acquisition Team works with the Regional Telecommunications Business Office (TBO) and Regional Integrated Product Team to refine the order for the Telecommunications Regional TBO Circuit Request based on employee changes and other technology changes in the region.

Artifacts Used

Floor Plans
Statement of Work

Artifacts Created

Refined Regional TBO Circuit Request Order

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The Facilities Chief Information Officer refines orders based on changes to the workforce in the region.

Process Activity Name: ITAM-1.2.9 Communicate Asset Management Purchase to the Field

Previous Process Activity

ITAM-1.2.8 Refine Order

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The Regional Acquisition Team, or designee, communicates to both OIT and Logistics the asset management component to any equipment buy by completing the IT Procurement Bulletin and sending to the field.

Artifacts Used

Award Document including Warranty Information
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Order

Artifacts Created

IT Procurement Bulletin

Responsible Role

Regional Acquisition Team

Tools and Websites

Information Technology Acquisition Request System (ITARS)

VA Receiving Tracking System Portal

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

The IT Procurement Bulletin Containing Asset Management Component of the IT Buy contain, at a minimum, the following information: description of the project, IFCAP Purchase Order listing unit prices for each Contract Line Item Number, Category Stock Number, Common Model Number, Equipment Category, delivery schedule including quantities and shipping time frames.

Process Activity Name: ITAM-1.3 Local Procurement Purchases

Previous Process Activity

ITAM-1-DEC02 Regional Buy?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1.3 Local Procurement Purchases cycles through the following dependent activities:

- ITAM-1.3.1 Gather Business Line Requirements

- ITAM-1.3.2 Execute Special Funding

- ITAM-1.3.3 Execute Break - Fix

- ITAM-1.3.4 Develop Activation Projects

Process Activity Name: ITAM-1.3.1 Gather Business Line Requirements

Previous Process Activity

ITAM-1-DEC02 Regional Buy?

Next Process Activity

ITAM-1.3.1-DEC01 Special Funding?

Description

The Facility Chief Information Officer gathers business line requirements from customer interactions and local facility meetings using the Facility Strategic Plan, Equipment Requests, Move Requests, and Service Requests from the Local VA Leadership and IT Asset Manager. The outcome is a data call for local procurement needs for the facility.

Artifacts Used

Equipment Requests
Facility Strategic Plan
Local Tracking List
Move Requests
Service Requests

Artifacts Created

Spend Plan
Submission to Region - Data Call
Updated Local Tracking List

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.1-DEC01 Special Funding?

Previous Process Activity

ITAM-1.3.1 Gather Business Line Requirements

Next Process Activity

If yes, ITAM-1.3.2 Execute Special Funding

Or

If no, ITAM-1.3.1-DEC02 Activation?

Description

There is a decision dependency that determines the next activity to complete.

If this is Special Funding purchase the next activity to complete is ITAM-1.3.2 Execute Special Funding.

If this is not a Special Funding purchase proceed to the next decision diamond to determine the next activity to complete.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.3.1-DEC02 Activation?

Previous Process Activity

ITAM-1.3.1-DEC01 Special Funding?

Next Process Activity

If yes, ITAM-1.3.4 Develop Activation Projects

Or

If no, ITAM-1.3.3 Execute Break - Fix

Description

There is a decision dependency that determines the next activity to complete.

If this is an activation purchase the next activity to complete is ITAM-1.3.4 Develop Activation Projects.

If this is not an activation purchase the next activity to complete is ITAM-1.3.3 Execute Break - Fix.

Responsible Role

Facility Chief Information Officer

Process Activity Name: ITAM-1.3.2 Execute Special Funding

Previous Process Activity

ITAM-1.3-DEC01 Special Funding?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1.3.2 Execute Special Funding cycles through the following dependent activities.

- ITAM-1.3.2.1 Prioritize Projects

- ITAM-1.3.2.2 Determine Procurement Plan

- ITAM-1.3.2.3 Identify Funded Facility Requirements

- ITAM-1.3.2.4 Identify Funded SLM Requirements

- ITAM-1.3.2.5 Submit ITARS Request

- ITAM-1.3.2.6 Create and Submit IFCAP Form 2237

- ITAM-1.3.2.7 Approve IFCAP 2237

- ITAM-1.3.2.8 Submit VA Form 2237 to Purchasing

Process Activity Name: ITAM-1.3.2.1 Prioritize Projects

Previous Process Activity

ITAM-1.3.1-DEC01 Special Funding?

Next Process Activity

ITAM-1.3.2.2 Determine Procurement Plan

Description

If discretionary money is available, the Facility Chief Information Officer works with the Facility Director to prioritize and validate established needs.

Artifacts Used

Business Line Needs
Strategic Plans

Artifacts Created

Prioritized Project Requirements
Prioritized Projects

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.2.2 Determine Procurement Plan

Previous Process Activity

ITAM-1.3.2.1 Prioritize Projects

Next Process Activity

ITAM-1.3.2.2-DEC01 Facility Buy?

Description

The Regional Director (RD) works with the Network and Facility Chief Information Officer (FCIO) to determine the procurement spending plan based on facility requirements or service line management requirements. If this is a facility funded requirement, the Regional Directors works with the FCIO to break out the facility procurement dollars. If this is not a facility buy, the RD works with the FCIO to break out the Service Line Requirements.

Artifacts Used

Prioritized Project Requirements
Prioritized Projects

Artifacts Created

Procurement Plan

Responsible Role

Regional Director

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.2.2-DEC01 Facility Buy?

Previous Process Activity

ITAM-1.3.2.2 Determine Procurement Plan

Next Process Activity

If yes, ITAM-1.3.2.3 Identify Funded Facility Requirements

Or

If no, ITAM-1.3.2.4 Identify Funded SLM Requirements

Description

There is a decision dependency that determines the next activity to complete.

If this is a Facility Buy the next activity to complete is ITAM-1.3.2.3 Identify Funded Facility Requirements.

If this is not a Facility Buy the next activity to complete is ITAM-1.3.2.4 Identify Funded SLM Requirements.

Responsible Role

Regional Director

Process Activity Name: ITAM-1.3.2.3 Identify Funded Facility Requirements

Previous Process Activity

ITAM-1.3.2.2-DEC01 Facility Buy?

Next Process Activity

ITAM-1.3.2.5 Submit ITARS Request

Description

The Regional Director works with the Network and Facility Chief Information Officer to break out the funded VA Facility Requirements from the Procurement Plan.

Artifacts Used

Procurement Plan

Artifacts Created

VA Facility Requirements

Responsible Role

Regional Director

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.2.4 Identify Funded SLM Requirements

Previous Process Activity

ITAM-1.3.2.2-DEC01 Facility Buy?

Next Process Activity

ITAM-1.3.2.5 Submit ITARS Request

Description

The Regional Director works with the Network and Facility Chief Information Officer to break out the funded Service Line Manager Requirements from the Procurement Plan.

Artifacts Used

Re-prioritized Project Requirements
Re-prioritized Projects

Artifacts Created

Service Line Manager Requirements

Responsible Role

Regional Director

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.2.5 Submit ITARS Request

Previous Process Activity

ITAM-1.3.2.3 Identify Funded Facility Requirements

Or

ITAM-1.3.2.4 Identify Funded SLM Requirements

Next Process Activity

Information Technology Acquisition Request System

Description

The Facility Chief Information Officer (FCIO) submits the Information Technology Acquisition Request System (ITARS) request.

Artifacts Used

Budget
Service Line Manager Requirements
VA Facility Requirements

Artifacts Created

ITARS Request

Responsible Role

Facility Chief Information Officer

Tools and Websites

Information Technology Acquisition Request System (ITARS)

One-VA Technical Reference Model

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The FCIO uses the One-VA Technical Reference Model for key equipment specifications for the ITARS Request.

Process Activity Name: ITAM-1.3.2.5-DEC01 ITARS Approved?

Previous Process Activity

There is a flow from Information Technology Acquisition Request System into ITAM

Next Process Activity

If yes, ITAM-1.3.2.6 Create

Or

If no, ITAM-2 Deploy and Manage IT Assets

Description

There is a decisions diamond that determines the next activity to complete;

- If the ITARS is approved the next activity to complete is ITAM-1.3.2.6 Create and Submit IFCAP 2237

- If the ITARS is not approved the activity ends.

Responsible Role

Regional Acquisition Team

Process Activity Name: ITAM-1.3.2.6 Create and Submit IFCAP 2237

Previous Process Activity

ITAM-1.3.2.5-DEC01 ITARS Approved?

Or

ITAM-1.3.2.7-DEC01 Approve?

Next Process Activity

ITAM-1.3.2.7 Approve ICAP 2237

Description

The Regional Acquisition Team, after reviewing the Technical Acquisition Center Proposal from the Statement of Work, electronically prepares the purchase order using the Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) site to generate the 2237 - Request, Turn-in and Request for Property or Services

When preparing the IFCAP 2237 ensure the proper Budget Object Code (BOC) is assigned in the Budget Tracking Tool per the Contract Line Item Number (CLIN).

Artifacts Used

Statement of Work and/or Performance Work Statement
Technical Acquisition Center Proposal

Artifacts Created

IFCAP 2237 - Request, Turn-in and Request for Property or Services

Responsible Role

Regional Acquisition Team

Tools and Websites

Budget Tracking Tool (BTT)

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The IFCAP 2237 must be in enough detail for logistics to determine if the acquisition includes equipment, services, or software. The 2237 becomes the IFCAP Purchase order and is used by Logistics to properly receive and catalog equipment within the VA system of records.

The IFCAP 2237 - Request, Turn-in and Request for Property or Services artifact is located in the IFCAP Portal in Tools and Websites.

Process Activity Name: ITAM-1.3.2.7 Approve ICAP 2237

Previous Process Activity

ITAM-1.3.2.6 Create and Submit IFCAP 2237

Next Process Activity

ITAM-1.3.2.7-DEC01 Approve?

Description

The Approving Official reviews the IFCAP 2237 - Request, Turn-in and Request for Property or Services and if approved returns the approved 2237 to the Regional Acquisition Team for submission to Purchasing. If not approved the 2237 is return to the Regional Acquisition Team for revisions.

Artifacts Used

IFCAP 2237 - Request, Turn-in and Request for Property or Services

Artifacts Created

Approved IFCAP 2237 - Request, Turn-in and Request for Property or Services

Responsible Role

Approving Official

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

The IFCAP 2237 - Request, Turn-in and Request for Property or Services artifact is location in the IFCAP Portal in Tools and Websites.

Process Activity Name: ITAM-1.3.2.7-DEC01 Approve?

Previous Process Activity

ITAM-1.3.2.7 Approve ICAP 2237

Next Process Activity

If yes, ITAM-1.3.2.8 Submit IFCAP 2237 to Purchasing

Or

If no, ITAM-1.3.2.6 Create and Submit IFCAP 2237

Description

There is a decision dependency that determines the next activity to complete.

- If the Approving Official approves the IFCAP 2237 the next activity to complete is ITAM-1.3.2.8 Submit IFCAP 2237 to Purchasing

- If the Approving Official does not approve the IFCAP 2237 the next activity to complete is ITAM-1.3.2.6 Create and Submit IFCAP 2237

Responsible Role

Approving Official

Process Activity Name: ITAM-1.3.2.8 Submit IFCAP 2237 to Purchasing

Previous Process Activity

ITAM-1.3.2.7-DEC01 Approve?

Next Process Activity

PUR-1 Receive Approved Funding Requirement

Description

The Regional Acquisition Team submits the approved Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) 2237 Request, Turn-in and Request for Property or Services to Purchasing.

Artifacts Used

IFCAP 2237 - Request, Turn-in and Request for Property or Services

Artifacts Created

Approved IFCAP 2237 - Request, Turn-in and Request for Property or Services

Responsible Role

Regional Acquisition Team

Tools and Websites

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.3 Execute Break - Fix

Previous Process Activity

ITAM-1.3.1-DEC02 Activations?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The Facility Chief Information Officer executes a break - fix local procurement for any items that has been damaged and requires repairs following local procurement guidelines.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Local Procurement

Responsible Role

Facility Chief Information Officer

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Acquisition Regulation (VAAR)

More Info

When completed in a future ProPath release, this sub-process, Execute Break - Fix, is to consist of additional activities with associated artifacts, tools, and standards. This process varies across the pillars based on local procurement Break - Fix processes.

Process Activity Name: ITAM-1.3.4 Develop Activation Projects

Previous Process Activity

ITAM-1.3.1-DEC02 Activation?

Next Process Activity

ITAM-2 Deploy and Manage IT Assets

Description

The sub-process ITAM-1.3.4 Develop Activation Projects cycles through the following dependent activities.

- ITAM-1.3.4.1 Identify Local Projects

- ITAM-1.3.4.2 Solicit Local VA Leadership Input

- ITAM-1.3.4.3 Provide Feedback

- ITAM-1.3.4.4 Determine Activation Meets Requirements Definition

Process Activity Name: ITAM-1.3.4.1 Identify Local Projects

Previous Process Activity

ITAM-1.3.1-DEC02 Activation?

Next Process Activity

ITAM-1.3.4.2 Solicit Local VA Leadership Input

Description

The Facility Chief Information Officer works with the IT Asset Manager and Local VA Leadership to identify local projects for activations that meet budget requirements.

Artifacts Used

Facility Strategic Plan
IT Tactical Plan
Local Tracking List

Artifacts Created

Budget Requirements List
Updated IT Tactical Plan

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.4.2 Solicit Local VA Leadership Input

Previous Process Activity

ITAM-1.3.4.1 Identify Local Projects

Next Process Activity

ITAM-1.3.4.3 Provide Feedback

Description

The Facility Chief Information Officer (FCIO) solicits input from the IT Asset Manager and VA Local Leadership including the Fiscal Officer or Local Facilities Management on specific IT requirements. The FCIO is actively participating in Local Strategic Planning Process.

Artifacts Used

Budget Requirements List
Local Tracking List
Submission to Region - Data Call
Workforce Planning Projections (Hoteling and Telework Projections)

Artifacts Created

Verbal and Formal Input

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

None Listed

Process Activity Name: ITAM-1.3.4.3 Provide Feedback

Previous Process Activity

ITAM-1.3.4.2 Solicit Local VA Leadership Input

Next Process Activity

ITAM-1.3.4.4 Determine Activation Meets Requirements Definition

Description

The Local VA Leadership provides feedback to the Facility Chief Information Officer concerning specific IT needs.

Artifacts Used

Budget Requirements List
Local Tracking List
Verbal and Formal Input (Email or other formal communication means)

Artifacts Created

Feedback on IT Needs

Responsible Role

Local VA Leadership

Tools and Websites

None Listed

Standards

Federal Acquisition Regulation (FAR)

IFCAP Requirements Analysts User's Guide

VA Acquisition Regulation (VAAR)

More Info

There are various methods for how the VA Leadership provides feedback on specific IT needs.

Process Activity Name: ITAM-1.3.4.4 Determine Activation Meets Requirements Definition

Previous Process Activity

ITAM-1.3.4.3 Provide Feedback

Next Process Activity

ITAM-1.3.4.4=DEC01 Activations?

Description

The Facility Chief Information Officer works with both the IT Asset Management Division (or designee) and the VA Local Leadership to determine the procurement meets the current definition of an activation.

Activation Requests serve as a vehicle for OI&T to obtain approval and begin procurement stages which includes endpoint devices and infrastructure to support new staff. OI&T Activation Requests are defined as the method in which administrations work with OI&T field managers to

provide IT support to the opening of new clinics, remodeling non-clinical to clinical space (i.e.: new exam rooms), expanded services and Full-Time Equivalent Employee (FTEE) growth. An approved VHA activation number is required for major and minor construction projects.

Artifacts Used

Approved VHA activation number for major and minor construction projects.
Cost Estimate
Verbal and Formal Input

Artifacts Created

New Record of Activation For Quarterly Activation Data Call

Responsible Role

Facility Chief Information Officer

Tools and Websites

Systems Engineering and Design Review

Information Technology Acquisition Request System (ITARS)

Standards

Federal Acquisition Regulation (FAR)

VA Acquisition Regulation (VAAR)

More Info

Examples of what is not an activation include:

- Remodeling with no increase in FTEE or usable square footage

- Replacement of equipment

- Innovation projects

- Moving from one location to another

- Creating a pool of spare equipment

Process Activity Name: ITAM-1.3.4.4-DEC01 Activations?

Previous Process Activity

ITAM-1.3.4.4 Determine Activation Meets Requirements Definition

Next Process Activity

If yes, ITAM 1.2 Regional Buys (Activations)

Or

If no, ITAM 1.3.2 Execute Special Funding

Description

There is a decision dependency that determines the next activity to complete.

If the purchase is an Activations acquisition the next activity to complete is ITAM 1.2 Regional Buys (Activations)

If the purchase is not an Activations acquisition the next activity to complete is ITAM 1.3.2 Execute Special Funding

Responsible Role

IT Asset Manager

Process Activity Name: ITAM-2 Deploy and Manage IT Assets

Previous Process Activity

ITAM-1 Acquire IT Assets

Next Process Activity

ITAM-3 Monitor IT Assets

Description

The sub-process ITAM-2 Deploy and Manage IT Assets cycles through the following dependent activities.

- ITAM-2.1 Receive Notification of Incoming Shipments

- ITAM-2.2 Manage Receipt of Assets in Logistics

- ITAM-2.3 Manage Assets in Storage

- ITAM-2.4 Prepare Assets for Deployment

- ITAM-2.5 Manage Deployed Assets

Process Activity Name: ITAM-2.1 Receive Notification of Incoming Shipment

Previous Process Activity

ITAM-1 Acquire IT Assets

Next Process Activity

ITAM-2.2 Manage Receipt of Assets in Logistics

Description

The sub-process ITAM-2.1 Receive Notification of Incoming Shipment cycles through the following dependent activities.

- ITAM-2.1.1 Notify Logistics of Pending Shipments

- ITAM-2.1.2 Resolve Split Delivery Dates

Process Activity Name: ITAM-2.1.1 Notify Logistics of Pending Shipments

Previous Process Activity

ITAM-1 Acquire IT Assets

Next Process Activity

ITAM-2.1.2 Resolve Split Delivery Dates

Description

The Facility Chief Information Officer (FCIO) notifies Logistics The Facility Chief Information Officer (FCIO), or designee notifies Logistics Staff of pending incoming shipments. The FCIO provides Logistics with information regarding incoming shipments of equipment. For local procurements this information is extracted from Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) system. For national procurements shipment and tracking information is available on the Information Technology Receiving Support System (ITRSS) portal. In addition, national procurements have a requirement for the vendor to make positive contact with local sites prior to delivery to ensure space availability.

Artifacts Used

Delivery Spreadsheets
IT Procurement Bulletin
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement Purchase Orders
Procurement and Delivery Details

Artifacts Created

Delivery Notification (See More Information)

Responsible Role

Facility Chief Information Officer

Tools and Websites

Field Operations WIKI Knowledge Repository

VA Receiving Tracking System Portal

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

Notifying Logistics of pending shipments is a collaborative effort involving Logistics/Property Management and the FCIO or the IT Custodial Officer.

Communication through the facility locations occurs via emails and Excel spreadsheets as well as delivery notifications (automated emails) listed in Artifacts Created.

Process Activity Name: ITAM-2.1.2 Resolve Split Delivery Dates

Previous Process Activity

ITAM-2.1.1 Notify Logistics of Pending Shipments

Next Process Activity

ITAM-2.2 Manage Receipt of Assets in Logistics

Description

The IT Asset Manager or designee resolves issues arising from split delivery dates. The IT Asset Manager identifies overlapping dates, staffing shortages, and storage problems and resolves these with the Facility Chief Information Officer. The IT Asset Manager interacts directly with the shipping company to resolve issues or problems with incoming shipments.

Artifacts Used

Delivery Notification
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) Purchase Orders

Artifacts Created

Multiple Delivery Appointments/Announcements (Detailed)

Responsible Role

IT Asset Manager

Tools and Websites

None Listed

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

All packing slips must reference the IFCAP Purchase Order.

The delivery appointments/announcements must contain quantities, dates, schedules, purchase order number, point of contact, and, if needed, special delivery instructions.

The delivery appointments/announcements must be affixed on all boxes of an order.

Requirements have been built into awards for all National Buys for vendors to contact VA sites before delivery.

The IT Asset Manager uses emails, calendars, and phone calls to resolve problems associated with split delivery dates.

Process Activity Name: ITAM-2.2 Manage Receipt of Assets in Logistics

Previous Process Activity

ITAM-2.1 Receive Notification of Incoming Shipments

Next Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Description

The sub-process ITAM-2.2 Manage Receipt of Assets in Logistics cycles through the following dependent activities.

- ITAM-2.2.1 Verify Invoice and Equipment

- ITAM-2.2.2 Identify Components

- ITAM-2.2.3 Identify and Record Serial Numbers

- ITAM-2.2.4 Produce NX Catalog Validation Report

- ITAM-2.2.5 Count Assets to Match Receiving Documents

- ITAM-2.2.6 Notify GIP of Consumables

- ITAM-2.2.7 Prepare Barcode Label

- ITAM-2.2.8 Validate Barcode Label

- ITAM-2.2.9 Crosscheck Barcode Label to Equipment

Process Activity Name: ITAM-2.2-DEC01 Hold in Logistics

Previous Process Activity

ITAM-2.2 Manage Receipt of Assets in Logistics

Next Process Activity

If yes, ITAM-2.4 Prepare Assets for Deployment

Or

If no, ITAM-2.3 Manage Assets in Storage

Description

There is a decision dependency that determines the next activity to complete.

If the assets are to be held in logistics the next activity to complete is ITAM-2.4 Prepare Assets for Deployment.

If the assets are not to be held in logistics the next activity to complete is ITAM-2.3 Manage Assets in Storage.

Responsible Role

Logistics Staff

Process Activity Name: ITAM-2.2.1 Verify Invoice and Equipment

Previous Process Activity

ITAM-2.1 Receive Notification of Incoming Shipment

Next Process Activity

ITAM-2.2.2 Identify Components

Description

The Logistics Staff conducts receiving verification and equipment identification. The Logistics Staff reviews purchase orders and shipping documents to match up with actual assets received.

Artifacts Used

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement Purchase Orders
Shipping Documents (Packing Slips)

Artifacts Created

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System Receiving Report

Responsible Role

Logistics Staff

Tools and Websites

None Listed

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

Use electronic means (i.e. barcode scanners and advance importable spreadsheets) when possible to capture asset information such as serial numbers, purchase order numbers, and if applicable, the Nation Project number.

Process Activity Name: ITAM-2.2.2 Identify Components

Previous Process Activity

ITAM-2.2.1 Verify Invoice and Equipment

Next Process Activity

ITAM-2.2.3 Identify and Record Serial Numbers

Description

The Logistics Staff works with the IT Asset Manager to identify and validate the receipt of the asset and related components. This is a manual process of reconciling the components/consumables to the purchase order.

The Logistics Staff is responsible for confirming the accuracy of incoming receipts so payment can be approved for the vendors.

If the acquisition is a national procurement the Logistics Staff must notify the OIT Inventory Management Officer that the material has been received in order for payment to be made.

Artifacts Used

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement Purchase Orders
Shipping Documents (Packing Slips)

Artifacts Created

List of consumables for entry to Generic Inventory Package
Validated Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System Receiving Report

Responsible Role

Logistics Staff

Tools and Websites

VA IT Inventory Compliance (IIC) Portal

VA Receiving Tracking System Portal

Vendor(s) Internet Portal Entry

Standards

IFCAP Delivery Order Users Guide

VA Handbook 7002, Logistics Management Procedures

VHA Directive 1761.1, Standardization of Supplies and Equipment

More Info

Additional information used for consumables can be found in "Contract Award Documents" and "Vendor Product Manuals" supplied by the IT Asset Manager.

Process Activity Name: ITAM-2.2.3 Identify and Record Serial Numbers

Previous Process Activity

ITAM-2.2.2 Identify Components

Next Process Activity

ITAM-2.2.4 Produce NX Catalog Validation Report

Description

The Logistics Staff identifies and records serial numbers. The Logistics Staff collects the needed information from the equipment to populate the Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) record for each of the thirty-five required fields. Any questions related to serial numbers and other required fields are addressed with the IT Asset Manager.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Record
Delivery Order
Equipment Inventory List
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System
Receiving Report
Shipping Documents (Packing Slips)
Vendor Equipment Tags/Labels
Vendor Spreadsheets

Artifacts Created

Receiving Report
Updated Automated Engineering Management System/Medical Equipment Report System Record
Updated Equipment Inventory List

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Printer

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

Some locations use Excel spreadsheets to upload batches of serial numbers if the vendor provides this detail. Vendor spreadsheets containing serial numbers provided in national buys are available from National Inventory Management Officer. Required Fields are highlighted on pages 47 and 48 of the VA Handbook 7002, Logistics Management Procedures.

Process Activity Name: ITAM-2.2.4 Produce NX Catalog Validation Report

Previous Process Activity

ITAM-2.2.3 Identify and Record Serial Numbers

Next Process Activity

ITAM-2.2.5 Count Assets to Match Receiving Documents

Description

The Logistics Staff produces a NX Catalog Validation Report showing new assets added to the Equipment Inventory Listing (EIL) from Automated Engineering Management System /Medical Equipment Report System (AEMS/MERS) Report.

Artifacts Used

AEMS/MERS Record
Delivery Order
Equipment Inventory List
Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System

Receiving Report
Shipping Documents (Packing Slips)
Vendor Equipment Tags/Labels
Vendor Spreadsheets

Artifacts Created

NX Catalog Validation Report

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Printer

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

Some locations use internal notification systems to show new assets added to the EIL.

The NX Catalog Validation Report is to be run in AEMS/MERS and taken to the Facility Chief
Information Officer for verification.

Process Activity Name: ITAM-2.2.5 Count Assets to Match Receiving Documents

Previous Process Activity

ITAM-2.2.4 Produce NX Catalog Validation Report

Next Process Activity

ITAM-2.2.6 Notify GIP of Consumables

Description

The Logistics Staff counts assets and matches them to the receiving documents. The Logistics
Staff identifies accountable versus expendable items and assigns the correct Category Stock
Number (CSN).

The Logistics Staff also verifies the assets match receiving documents and records the results in
Automated Engineering Management System/Medical Equipment Report System
(AEMS/MERS). For national buys the Logistics Staff records the quantities received in the

Information Technology Receiving Support System (ITRSS) portal. Locations not on ITRSS portal must confirm receipt of national buys to the OIT Inventory Management Officer.

Artifacts Used

Automated Engineering Management System/ Medical Equipment Report System Property Records
Information Technology Receiving Support System Portal Records
VA Catalog #3 Supply Catalog
Vendor Shipping/Receiving Documents

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Property Records
Updated Information Technology Receiving Support System Portal Records

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA Receiving Tracking System Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The ITRSS Portal provides the correct CSN and also has links to common Information Technology CSN's.

Process Activity Name: ITAM-2.2.6 Notify GIP of Consumables

Previous Process Activity

ITAM-2.2.5 Count Assets to Match Receiving Documents

Next Process Activity

ITAM-2.2.7 Prepare Barcode Label

Description

The IT Asset Manager, or designee, notifies the Logistics Manager or Item Manager of the Generic Inventory Package (GIP) of consumables that need to be stocked for future end-user requests.

Artifacts Used

Vendor Documentation

Artifacts Created

Inventory Request for Generic Inventory Package to Stock

Responsible Role

IT Asset Manager

Tools and Websites

Vendor web sites

Standards

IFCAP Requirements Analysts User's Guide

More Info

None Listed

Process Activity Name: ITAM-2.2.7 Prepare Barcode Label

Previous Process Activity

ITAM-2.2.6 Notify GIP of Consumables

Next Process Activity

ITAM-2.2.8 Validate Barcode Label

Description

The Logistics Staff produces and prints barcode labels for all received non-expendable assets by ensuring all printed fields of Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) records are completed.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Barcode Label
Companion List to Barcode Labels

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The Equipment Category Barcode Label contains the equipment entry number, serial number, station number, and asset description.

Process Activity Name: ITAM-2.2.8 Validate Barcode Label

Previous Process Activity

ITAM-2.2.7 Prepare Barcode Label

Next Process Activity

ITAM-2.2.9 Crosscheck Barcode Label to Equipment

Description

The Logistics Staff validates barcode labels. The Logistics Staff ensures the barcode labels are affixed to the asset or are provided to the IT Asset Manager. The IT Asset Manager or designee verifies the information on the label matches the information on the asset.

No equipment is placed "in use" without a proper barcode label affixed.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Barcode Labels
Companion List to Barcode Labels

Artifacts Created

Replacement Automated Engineering Management System/Medical Equipment Report System Barcode Labels

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

This step tests and verifies that the barcode label was affixed to the asset properly (i.e. not printed poorly or attached with creases, tears, hard to read location, etc.) and can be read by a scanner. When uploaded back to AEMS/MERS it provides an initial Physical Inventory Date that is used on the Information Technology Inventory Compliance portal calculations.

The Companion List is from AEMS/MERS.

Process Activity Name: ITAM-2.2.9 Crosscheck Barcode Label to Equipment

Previous Process Activity

ITAM-2.2.8 Validate Barcode Label

Next Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Description

The IT Asset Manager, or designee, crosscheck's barcode labels to equipment. The IT Asset Manager has a third party (an entity other than the Logistics Staff) conduct a manual/physical crosscheck of equipment entry numbers, equipment description, and serial numbers to ensure they match to the barcode labels.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Barcode Labels
NX Catalog Validation Report

Artifacts Created

Replacement Barcode Labels (if needed)

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

Internal Quality Control checks are conducted by the IT Asset Manager to ensure the barcode label being printed can be read by the barcode scanner.

This activity is a Best Practice to help with General Accounting Office recommendations.

Process Activity Name: ITAM-2.3 Manage Assets in Storage

Previous Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Next Process Activity

ITAM-2.4 Prepare Assets for Deployment

Description

The sub-process ITAM-2.3 Manage Assets in Storage cycles through the following dependent activities.

- ITAM-2.3.1 Receive Equipment from Logistics

- ITAM-2.3.2 Obtain Secure Storage Space

- ITAM-2.3.3 Limit Access to Storerooms

- ITAM-2.3.4 Scan Equipment Into Storage

- ITAM-2.3.5 Perform Periodic Inventory Scans

- ITAM-2.3.6 Prepare Deployment Plan

Process Activity Name: ITAM-2.3.1 Receive Equipment from Logistics

Previous Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Next Process Activity

ITAM-2.3.2 Obtain Secure Storage Space

Description

The Information Technology (IT) Staff receives equipment from Logistics. The IT Staff takes receipt of the equipment from Logistics. A copy of the Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System (IFCAP) Receiving Report is presented for signature by the IT Staff at transfer.

Artifacts Used

Integrated Funds Distribution, Control Point Activity, Accounting and Procurement (IFCAP) System Receiving Report

Artifacts Created

Signed Integrated Funds Distribution, Control Point Activity, Accounting and Procurement System Receiving Report

Responsible Role

IT Staff

Tools and Websites

None Listed

Standards

IFCAP Requirements Analysts User's Guide

VA Handbook 7002, Logistics Management Procedures

More Info

The VA standard is 95% of all assets must be deployed with 90 days of receipt into storage. Only certain authorized Information Technology personnel can sign for equipment per the VA Handbook 7002, Logistics Management Procedures. Written authorization comes from Facility Chief Information Officer. Copies of the Signed Receiving Report are sent to Logistics and the IT Asset Manager.

Process Activity Name: ITAM-2.3.2 Obtain Secure Storage Space

Previous Process Activity

ITAM-2.3.1 Receive Equipment from Logistics

Next Process Activity

ITAM-2.3.3 Limit Access to Storerooms

Description

The Facility Chief Information Officer (FCIO) obtains secure storage space for equipment. The FCIO working with Information Technology (IT) Staff (Custodial Official) identifies storage space and oversees needed modifications to secure the space such as re-keying access doors. The FCIO makes arrangements with security, law enforcement management and engineering management limiting access to IT Staff.

If any staging, informal or temporary storage space is required the FCIO or delegate will abide by the physical security requirements for these spaces as outlined in VA Handbook 0730/4, Appendix B. These requirements include re-keying, access control, and no overall access; refer to VA Directive 0730/4 for additional requirements on security of temporary, informal, and staging area space. Install a suitable partition in the interstitial space which prevents "up and over" access. The FCIO or delegate will notify police and security of the newly created space so that these areas are included in the routine security checks.

Artifacts Used

Floor Plan (Temporary Storage)
Lock Inventory

Physical Security Space List

Artifacts Created

Updated Floor Plan (Temporary Storage)
Updated Lock Inventory
Updated Physical Security Space List

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

VA Handbook 0730/4, Security and Law Enforcement

VA Handbook 7002, Logistics Management Procedures

More Info

The VA standard is 95% of all assets must be deployed with 90 days of receipt into storage.

Space Committees are in place to help identify secure storage locations. In many cases no artifacts are created as suitable storage space already exists.

Process Activity Name: ITAM-2.3.3 Limit Access to Storerooms

Previous Process Activity

ITAM-2.3.2 Obtain Secure Storage Space

Next Process Activity

ITAM-2.3.4 Scan Equipment Into Storage

Description

The IT Asset Manager limits access to storerooms used for storing equipment prior to deployment. The IT Asset Manager provides security during the workday for these locations and works with VA Police to ensure after hours security at these locations.

Artifacts Used

Updated Floor Plan (Temporary Storage)
Updated Lock Inventory
Updated Physical Security Space List

Artifacts Created

Security Logs

Responsible Role

IT Asset Manager

Tools and Websites

None Listed

Standards

VA Handbook 0730/4, Security and Law Enforcement

VA Handbook 7002, Logistics Management Procedures

More Info

IT Asset Management Council was established to develop the security measures in VA Handbook 0730/4, Security and Law Enforcement.

Process Activity Name: ITAM-2.3.4 Scan Equipment Into Storage

Previous Process Activity

ITAM-2.3.3 Limit Access to Storerooms

Next Process Activity

ITAM-2.3.5 Perform Periodic Inventory Scans

Description

The Information Technology (IT) Staff scans and moves equipment into storage locations. The IT Staff scans the barcode labels, changes the physical location to the IT storage location, and uploads the information to the Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS).

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

AEMS/MERS Equipment Barcode and Location Space Labels are updated with physical inventory date and location fields in the records.

Process Activity Name: ITAM-2.3.5 Perform Periodic Inventory Scans

Previous Process Activity

ITAM-2.3.4 Scan Equipment Into Storage

Next Process Activity

ITAM-2.3.6 Prepare Deployment Plan

Description

The IT Asset Manager, or designee, performs periodic inventory scans of equipment in secured storage locations to maintain inventory accuracy. The IT Asset Manager performs periodic and annual inventory scans of the storeroom locations updating the date and location fields per the General Accountability Office (GAO) audit informal recommendations.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

None Listed

More Info

Performing periodic inventory scans is considered a Best Practice.

Process Activity Name: ITAM-2.3.6 Prepare Deployment Plan

Previous Process Activity

ITAM-2.3.5 Perform Periodic Inventory Scans

Next Process Activity

ITAM-2.4 Prepare Assets for Deployment

Description

The Facility Chief Information Officer (FCIO) or designee reviews the Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) records and prepares a deployment plan based on facility requirements.

Artifacts Used

Facility Requirements

Artifacts Created

Deployment Plan

Responsible Role

Facility Chief Information Officer

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Field Operations WIKI Knowledge Repository

Region 1 Activations, Expansions, Upgrades and Refresh Portal

VA IT Inventory Control Knowledge Center

Standards

None Listed

More Info

To access other Activation Portals contact the Region's ITAM Division Chiefs or RILO's. The contact information is available using the VA IT Inventory Control Knowledge Center listed in Tools.

Process Activity Name: ITAM-2.4 Prepare Assets for Deployment

Previous Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Or

ITAM-2.3 Manage Assets in Storage

Next Process Activity

ITAM-2.5 Manage Deployed Assets

Description

The sub-process ITAM-2.4 Prepare Assets for Deployment cycles through the following dependent activities.

- ITAM-2.4.1 Scan for Deployment to Staging Area

- ITAM-2.4.2 Validate Updated Location

Process Activity Name: ITAM-2.4.1 Scan for Deployment to Staging Area

Previous Process Activity

ITAM-2.2-DEC01 Hold in Logistics?

Or

ITAM-2.3 Manage Assets in Storage

Next Process Activity

ITAM-2.4.2 Validate Updated Location

Description

The IT Asset Manager, or designee, scans all equipment removed from storage and placed into the staging area for deployment, as applicable.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Barcode Labels
Deployment Plan
Location Door Tags

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Directive 6500, Managing Information Security Risk: VA Information Security Program

VA Handbook 0730/4, Security and Law Enforcement

VA Handbook 7002, Logistics Management Procedures

More Info

None Listed

Process Activity Name: ITAM-2.4.2 Validate Updated Location

Previous Process Activity

ITAM-2.4.1 Scan for Deployment to Staging Area

Next Process Activity

ITAM-2.5 Manage Deployed Assets

Description

The IT Asset Manager, or designee, validates the locations of assets deployed to staging areas are updated successfully in Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS). The Asset Manager physically delivers the assets to staging areas.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Barcode Labels

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

This is a Best Practice Quality Check step to ensure accurate AEMS/MERS Physical Inventory Date and Location Field Data.

Process Activity Name: ITAM-2.5 Manage Deployed Assets

Previous Process Activity

ITAM-2.4 Prepare Assets for Deployment

Next Process Activity

ITAM-3 Monitor IT Assets

Description

The sub-process ITAM-2.5 Manage Deployed Assets cycles through the following dependent activities.

- ITAM-2.5.1 Remove Assets from Storage

- ITAM-2.5.2 Update Location Records

- ITAM-2.5.3 Obtain End-User Signature

- ITAM-2.5.4 Deploy Asset

Process Activity Name: ITAM-2.5.1 Remove Assets from Storage

Previous Process Activity

ITAM-2.4 Prepare Assets for Deployment

Next Process Activity

ITAM-2.5.2 Update Location Records

Description

The Logistics Staff moves all items, in collaboration with Information Technology Staff, from secured storage into staging areas for deployment.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Staged Information Technology Equipment

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

Logistics is not required to maintain a running inventory at this stage.

Process Activity Name: ITAM-2.5.2 Update Location Records

Previous Process Activity

ITAM-2.5.1 Remove Assets from Storage

Next Process Activity

ITAM-2.5.2-DEC01 Mobile / Loaned Equipment?

Description

Information Technology (IT) Staff tracks and updates locations when assets are moved from secure storage. The IT Staff uploads new Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) location records.

Assets not physically located within a VA supported facility (i.e. laptops, telecommuter equipment, etc.) need to reflect the offsite location using the IT REMOTE LOCATION, LOCATION, and COMMENTS field in AEMS/MERS.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

Changing AEMS/MERS location by the IT Staff is part of the new IT options in AEMS/MERS. The IT Staff uses the AEMS/MERS IT Owner Menu to update the Inventory Edit fields. Inventory Edit Options allows OIT to edit the record for existing piece of equipment. Only equipment that has a CMR/EIL with IT TRACKING set to YES is to be updated. This option is locked with the EN IT INVENTORY Security Key.

Process Activity Name: ITAM-2.5.2-DEC01 Mobile / Loaned Equipment?

Previous Process Activity

ITAM-2.5.2 Update Location Records

Next Process Activity

If yes, ITAM-2.5.3 Obtain End-User Signature.

Or

If no, ITAM-2.5.4 Deploy Asset

Description

Note: There is a decision dependency that determines the next activity to complete:

If the equipment is mobile / loaned equipment the next activity to complete is ITAM-2.5.3 Obtain End-User Signature.

If the equipment is not mobile / loaned equipment the next activity to complete is ITAM-2.5.4 Deploy Asset

Responsible Role

IT Staff

Process Activity Name: ITAM-2.5.3 Obtain End-User Signature

Previous Process Activity

ITAM-2.5.2-DEC01 Mobile / Loaned Equipment?

Next Process Activity

ITAM-2.5.4 Deploy Asset

Description

The Information Technology (IT) Staff obtains end-user signature electronically or physically for mobile / loaned equipment. There are two methods for collection signatures, one is with the VistA account and the second is printing a hard copy of the receipt from Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) for signature by the end-user.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records
VA Form 0887, VA Property Loan Form

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

IT Equipment Module

More Info

The form generated from AEMS/MERS may be used in lieu of VA Form 0887, VA Property Loan Form.

IT Staff uses AEMS/MERS menu to assign responsibilities.

Changing AEMS/MERS location by the IT Staff is part of the new IT options in AEMS/MERS. The IT Staff uses the AEMS/MERS IT Owner Menu to update the Inventory Edit fields.

Best practice is to create a "Mobile Use" location and assign all portable assets that are used in a telework or issued to an individual to this mobile use location.

Process Activity Name: ITAM-2.5.4 Deploy Asset

Previous Process Activity

ITAM-2.5.2-DEC01 Mobile / Loaned Equipment?

Or

ITAM-2.5.3 Obtain End-User Signature

Next Process Activity

ITAM-3 Monitor IT Assets

Description

The Information Technology (IT) Staff deploys the asset. All movement of IT Equipment is scanned into Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS). Assets issued to individuals such as laptops, BlackBerrys ®, cell phones, and other portable assets are to be moved to an IT tracked equipment inventory listing and assigned at the user level.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records
Updated Equipment Inventory Listing (See more information)

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

IT Equipment Module

More Info

The automated hand receipt generated from the Equipment Inventory Listing is used in lieu of VA Form 0887, Property Pass.

Process Activity Name: ITAM-3 Monitor IT Assets

Previous Process Activity

ITAM-2 Deploy and Manage IT Assets

Next Process Activity

ITAM-4 Dispose IT Assets

Description

The sub-process ITAM-3 Monitor IT Assets cycles through the following dependent activities.

- ITAM-3.1 Verify Inventory Data Records

- ITAM-3.2 Monitor Inventory Process

- ITAM-3.3 Track Movement of Non-Expendable Asset

- ITAM-3.4 Receive Notification of Annual Inventory

- ITAM-3.5 Perform Annual Inventory Reconciliation

- ITAM-3.6 Monitor Perpetual Inventory Process

Process Activity Name: ITAM-3.1 Verify Inventory Data Records

Previous Process Activity

ITAM-2.5 Manage Deployed Assets

Next Process Activity

ITAM-3.2 Monitor Inventory Process

Description

The Logistics Staff verifies all required fields within Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) records are complete. This process is completed jointly with IT Asset Manager and IT Staff.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
VA IT Inventory Compliance Portal Records

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records
Updated VA IT Inventory Compliance Portal Records

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

IT Performance Dashboard

Standards

None Listed

More Info

The VA IT Inventory Compliance (IIC) Portal shows details of assets by location for reporting to Management. The IT Performance Dashboard contains key information for each region.

Process Activity Name: ITAM-3.2 Monitor Inventory Process

Previous Process Activity

ITAM-3.1 Verify Inventory Data Records

Next Process Activity

ITAM-3.3 Track Movement of Non-Expendable Assets

Description

The sub-process ITAM-3.2 Monitor Inventory Process cycles through the following dependent activities.

- ITAM-3.2.1 Prepare Inventory Schedule

- ITAM-3.2.2 Conduct Annual Inventory Scan

Process Activity Name: ITAM-3.2.1 Prepare Inventory Schedule

Previous Process Activity

ITAM-2.5 Manage Deployed Assets

Next Process Activity

ITAM-3.2.2 Conduct Annual Inventory Scans

Description

The IT Asset Manager, or designee, prepares a monthly inventory schedule per the perpetual inventory process.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records Floor Plans

Artifacts Created

Inventory Schedule

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The IT Asset Manager prepares a schedule for going floor by floor and building by building to count all inventory over the course of a year.

Process Activity Name: ITAM-3.2.2 Conduct Annual Inventory Scans

Previous Process Activity

ITAM-3.2.1 Prepare Inventory Schedule

Next Process Activity

ITAM-3.3 Track Movement of Non-Expendable Assets

Description

The IT Asset Manager, or designee, conducts an annual inventory scan. The IT Asset Manager ensures IT staff systematically scans all equipment in each building at least once per year per VA Standard 7002, Logistics Management Procedures.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Inventory Schedule

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The IT Inventory Compliance Portal is a dashboard display of current status and historical performance.

Process Activity Name: ITAM-3.3 Track Movement of Non-Expendable Assets

Previous Process Activity

ITAM-3.2 Monitor Inventory Process

Next Process Activity

ITAM-3.4 Receive Notification of Annual Inventory

Description

Information Technology (IT) Staff tracks the movement of non-expendable assets by scanning equipment and uploading the updated location information and physical inventory date into Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS). The AEMS/MERS Exception Report is an artifact used to identify equipment that has not been inventoried in the last twelve months.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
VA IT Inventory Compliance Portal - Exception Report

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records
Updated VA IT Inventory Compliance Portal - Exception Report

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

IT Performance Dashboard

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The IT Inventory Compliance Portal is a dashboard display of current status and historical performance.

The IT Performance Dashboard contains key information for each region.

Process Activity Name: ITAM-3.4 Receive Notification of Annual Inventory

Previous Process Activity

ITAM-3.3 Track Movement of Non-Expendable Assets

Next Process Activity

ITAM-3.5 Perform Annual Inventory Reconciliation

Description

The IT Custodial Officer or designee receives notification from Logistics to conduct the annual inventory based on the last inventory anniversary date. A reminder notification is provided ninety days prior to the Official Notification Memo for the annual inventory.

The IT Custodial Officer obtains a working copy of the Exception Report. Twenty working days prior to the anniversary month of the EIL or the annual reconciliation date, Logistics will prepare an exception report capturing any items on the EIL that have not been inventoried in the previous 365 days. Items inventoried within the preceding 365 days to the 1st day of the current anniversary month will be excluded from the current exception report.

Artifacts Used

Equipment Inventory Listing
Inventory by Exception Report
Official Notification Memo (Annual Inventory)

Artifacts Created

Update Equipment Inventory Listing

Responsible Role

IT Custodial Officer

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The preferred method of running an exception list is from the local vista system, however, the IT Inventory Compliance Portal, which is updated on a weekly basis, may be used by the custodial officer to identify those assets that have not been inventoried in the past 365 days.

Process Activity Name: ITAM-3.5 Perform Annual Inventory Reconciliation

Previous Process Activity

ITAM-3.4 Receive Notification of Annual Inventory

Next Process Activity

ITAM-3.6 Monitor Perpetual Inventory Process

Description

The sub-process ITAM-3.5 Perform Annual Inventory Reconciliation cycles through the following dependent activities.

- ITAM-3.5.1 Produce Exception Listing

- ITAM-3.5.2 Reconcile Exception Listing

- ITAM-3.5.3 Perform Annual Inventory

- ITAM-3.5.4 Generate Report of Survey Form

- ITAM-3.5.5 Submit EIL

- ITAM-3.5.6 Perform 5% Verification

Process Activity Name: ITAM-3.5.1 Produce Exception Listing

Previous Process Activity

ITAM-3.4 Receive Notification of Annual Inventory

Next Process Activity

ITAM-3.5.2 Reconcile Exception Listing

Description

The Logistics Staff produces the inventory exception lists for Equipment Inventory Listings. The Accountable Officer and the Facility Chief Information Officer agree on a date range for the creation of the exception listing.

Twenty working days prior to the anniversary month of the EIL or the annual reconciliation date, Logistics will prepare an exception report capturing any items on the EIL that have not been inventoried in the previous 365 days. Items inventoried within the preceding 365 days to the 1st day of the current anniversary month will be excluded from the current exception report.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Class 1 Exception Listing

Artifacts Created

Updated Class 1 Exception Listing

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The preferred method of running an exception list is from the local vista system, however, the IT Inventory Compliance Portal, which is updated on a weekly basis, may be used by the custodial officer to identify those assets that have not been inventoried in the past 365 days.

Process Activity Name: ITAM-3.5.2 Reconcile Exception Listing

Previous Process Activity

ITAM-3.5.1 Produce Exception Listing

Next Process Activity

ITAM-3.5.3 Perform Annual Inventory

Description

The IT Asset Manager, or designee, reconciles/locates all equipment included in the Class 1 Exception Listing and creates a Reconciled Exception Listing Report. Any assets appearing on the Reconciled Exception Listing Report with the last physical inventory date of greater than one year that cannot be located is added to VA Form 1217, Report of Survey.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Updated Class 1 Exception Listing

Artifacts Created

Reconciled Class 1 Exception Listing Report
VA Form 1217, Report of Survey

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

As locations become more proficient with the perpetual inventory process fewer items are anticipated to appear on the Exception Listing report.

All annual inventory reconciliation must be completed within ten working days for less than 100 items on the Equipment Inventory Listing (EIL) and within twenty working days for 100 or more items appearing on the EIL per the VA Handbook 7002, Logistics Management Procedures.

Process Activity Name: ITAM-3.5.3 Perform Annual Inventory

Previous Process Activity

ITAM-3.5.2 Reconcile Exception Listing

Next Process Activity

ITAM-3.5.3-DEC01 Missing Equipment?

Description

The IT Asset Manager, or designee, performs the annual inventory as required in VA Handbook 7002, Logistics Management Procedures. The IT Asset Manager locates all equipment with scan dates greater than one year.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Reconciled Class 1 Exception Listing Report

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Barcode Scanner

Standards

None Listed

More Info

As locations become more proficient with the perpetual inventory process fewer items are anticipated to appear on the Exception Listing report.   All annual Consolidated Memorandum of Receipt reconciliation must occur within ten working days for less than 100 items on the Equipment Inventory Listing (EIL) and within twenty working days for 100 or more items appearing on the EIL per the VA Handbook 7002, Logistics Management Procedures.

Process Activity Name: ITAM-3.5.3-DEC01 Missing Equipment?

Previous Process Activity

ITAM-3.5.3 Perform Annual Inventory

Next Process Activity

If yes, ITAM-3.5.4 Generate Report of Survey Form

Or

If no, ITAM-3.5.5 Submit EIL

Description

Note: There is a decision dependency that determines the next activity to complete:

If there is missing equipment the next activity to complete is ITAM-3.5.4 Generate Report of Survey Form.

If there is no missing equipment the next activity to complete is ITAM-3.5.5 Submit EIL.

Responsible Role

IT Asset Manager

Process Activity Name: ITAM-3.5.4 Generate Report of Survey Form

Previous Process Activity

ITAM-3.5.3-DEC01 Missing Equipment?

Next Process Activity

ITAM-3.5.5 Submit EIL

Description

The IT Asset Manager, or designee, generates VA Form 1217, Report of Survey form for all equipment not found during reconciliation and sends the form to the Facility Chief Information

Officer. The IT Asset Manager conducts a preliminary investigation and alerts the Information Security Officer and VA Police of any assets not found prior to generating the Report of Survey form. Findings from the preliminary investigation are submitted on VA Form 1217, Report of Survey.

Any assets appearing on the Exception Listing Report with the last physical inventory date greater than one year that cannot be located are added to VA Form 1217, Report of Survey.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records Reconciled Class 1 Exception Listing Report

Artifacts Created

VA Form 1217, Report of Survey

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

None Listed

Process Activity Name: ITAM-3.5.5 Submit EIL

Previous Process Activity

ITAM-3.5.3-DEC01 Missing Equipment?

Or

ITAM-3.5.4 Generate Report of Survey Form

Next Process Activity

ITAM-3.5.6 Perform 5% Verification

Description

The Facility Chief Information Officer (FCIO) submits a signed the Equipment Inventory List (EIL) upon completion of the inventory. If applicable, the FCIO submits a signed Report of Survey.

Artifacts Used

Equipment Inventory List
VA Form 1217, Report of Survey

Artifacts Created

Certified Equipment Inventory List
Updated VA Form 1217, Report of Survey (Signed)

Responsible Role

Facility Chief Information Officer

Tools and Websites

None Listed

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The FCIO signature certifies the EIL

Process Activity Name: ITAM-3.5.6 Perform 5% Verification

Previous Process Activity

ITAM-3.5.5 Submit EIL

Next Process Activity

ITAM-3.6 Monitor Perpetual Inventory Process

Description

The Logistics Staff coordinates and leads the 5% independent verification and validation inventory process. This a double check to the Equipment Inventory Listing reconciliation. The VA Handbook 7002, Logistics Management Procedures requires three parties be involved to include, Logistics Staff, IT Staff, and one disinterested party.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Extract/Listing
Certified Equipment Inventory List

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System
Records

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

Some locations have the 5% option listed as a menu item on the AEMS/MERS system. The 5%
independent verification is to be done within ten working days of the completion of the EIL
inventory. If the inventory reconciliation rate falls below 95%, then another physical inventory
must be completed within six months.

Process Activity Name: ITAM-3.6 Monitor Perpetual Inventory Process

Previous Process Activity

ITAM-3.5 Perform Annual Inventory Reconciliation

Next Process Activity

ITAM-4 Dispose IT Assets

Description

The IT Asset Manager, or designee, monitors the status of the perpetual inventory process and
monitors the compliance status of the assets per the VA Logistics Policy and the General
Accountability Office recommendations. There is a local requirement for the IT Staff to maintain
control of equipment in possession of IT for deployment and turn-in.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Compliance Portal Charts, Reports and Extracts

Artifacts Created

Input to Regional Director, FCIO and IT Staff Performance Plans via Annual Reviews
Updated Automated Engineering Management System/Medical Equipment Report System
Records

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

VA IT Inventory Compliance (IIC) Portal

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

When completed in a future ProPath release, this sub-process, Monitor Perpetual Inventory Process, is to consist of additional activities with associated artifacts, tools, and standards..

Process Activity Name: ITAM-4 Dispose IT Assets

Previous Process Activity

ITAM-3 Monitor IT Assets

Next Process Activity

None

Description

The sub-process ITAM-4 Dispose IT Assets cycles through the following dependent activities.

- ITAM-4.1 Prepare Equipment for Turn-In

- ITAM-4.2 Sanitize Equipment

- ITAM-4.3 Submit Electronic Turn-In Request

- ITAM-4.4 Validate Turn-In Date

- ITAM-4.5 Coordinate Transfer to Logistics

- ITAM-4.6 Remove Equipment from EIL

Process Activity Name: ITAM-4.1 Prepare Equipment for Turn-In

Previous Process Activity

ITAM-3 Monitor IT Assets

Next Process Activity

ITAM-4.1-DEC01 Electronic Media?

Description

The IT Asset Manager, or designee, prepares equipment for turn-in. The IT Asset Manager scans equipment slated for removal from service and placed into a secured staging area.

Equipment is received from sources such as: Individuals being off-boarded, Supervisors/Contracting Officer Representative (COR)/IT Asset Manager, or other entities.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Equipment Barcode and Location Space Labels
Physical Inventory Date and Location

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Records
Updated Physical Inventory Date and Location

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

None Listed

Process Activity Name: ITAM-4.1-DEC01 Electronic Media

Previous Process Activity

ITAM-4.1 Prepare Equipment for Turn-In

Next Process Activity

If yes, ITAM-4.2 Sanitize Equipment

Or

If no, ITAM-4.3 Submit Electronic Turn-In Request

Description

Note: There is a decision dependency that determines the next activity to complete:

If the asset has an electronic media device the next activity to complete is ITAM-4.2 Sanitize Equipment.

If the asset does not have an electronic media device the next activity to complete is ITAM-4.3 Submit Electronic Turn-In Request

Responsible Role

IT Asset Manager

Process Activity Name: ITAM-4.2 Sanitize Equipment

Previous Process Activity

ITAM-4.1-DEC01 Electronic Media?

Next Process Activity

ITAM-4.3 Submit Electronic Turn-In Request

Description

The Information Technology (IT) Staff sanitizes equipment with onboard electronic media devices, such as computers, BlackBerrys ®, PDA's, cell phones, and other devices referenced in VA Handbook 6500.1, Electronic Media Sanitization prior to turn-in or transfer. The VA Handbook 6500.1 documents the sanitization procedures to follow for assets being disposed of as well as assets being transferred to other VA locations. The IT Staff documents the sanitization utilizing VA Form 0751, Sanitization Certificate, and if required, places the electronic media devices in a secure area. If the turned-in equipment is to be transferred, the IT Asset Manager ensures VA Form 134, Combination Requisition and Shipping Ticket, accompanies the asset. This process requires signatures from the Information Security Officer, the Facility Chief Information Officer, and IT staff person who performed the sanitization.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Records
Equipment Barcode Label

Artifacts Created

Equipment / Turn-In Request package in VistA
Sanitized Equipment
VA Form 0751, Information Technology Sanitization Certificate
VA Form 134, Combination Requisition and Shipping Ticket

Responsible Role

IT Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

MP-6 Electronic Media Sanitization SOP

VA Handbook 6500.1, Electronic Media Sanitization

VA Handbook 7002, Logistics Management Procedures

VA Handbook 0730/4, Security and Law Enforcement

VA Handbook 7348, Utilization and Disposal of Personal Property

More Info

All equipment items containing any form of media, including electronic storage, spent thermal printer ribbons, or any printed output, which, if released to the general public, could cause a breach in security or confidentiality for the Veteran or employee, are to be sanitized prior to turning in for disposal action. This sanitization process is to be documented on VA Form 0751, IT Equipment Sanitization Certificate accompanied by a turn in document, and furnished to Logistics Service by IT personnel once the process is complete.

If an asset uses any form of electronic media and is not being transferred, the hard drives or removable storage media must be labeled/marked (using indelible ink) with the Equipment Entry (EE) number of the equipment it was removed from taking care not to label/write over the serial number. If there are multiple drives, they should be labeled/marked 1/3, 2/3, 3/3, as appropriate to the associated quantity. All removed media is turned over to the Information Security Officer for secured storage and timely disposal. Electronic media devices awaiting sanitization are secured in a controlled environment per VA Handbooks 6500 and 6500.1 and VHA Handbook 0730/1, Security and Law Enforcement.

The VA Form 0751, Sanitization Certificate, (documented with the AEMS/MERS/ Equipment Barcode Label with Asset ID Number) accompanies all assets with electronic media devices to final disposal. (Must accompany the turn in documentation).

Process Activity Name: ITAM-4.3 Submit Electronic Turn-In Request

Previous Process Activity

ITAM-4.1-DEC01 Electronic Media?

Or

ITAM-4.2 Sanitize Equipment

Next Process Activity

ITAM-4.4 Validate Turn-In Date

Description

The IT Asset Manager, or designee, submits electronic turn-in requests. The IT Asset Manager uses Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) menu option [PRCN TURN ENTER] to submit items for turn-in. If the turned-in asset is to be transferred to another VA facility, the IT Asset Manager uses VA Form 134, Combination Requisition and Shipping Ticket, ensuring the all applicable asset data available from the VA IT Inventory Compliance (IIC) Portal is included on the form.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report Equipment System Status
Automated Engineering Management System/Medical Equipment Report System Equipment Barcode Labels
VA Form 0751, Sanitization Certificate
VA Form 134, Combination Requisition and Shipping Ticket

Artifacts Created

Electronic Turn-In Request Report
Updated Automated Engineering Management System/Medical Equipment Report System Status ("Turn-In Date")

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Barcode Scanner

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

VA Form 0751, Sanitization Certificate or if applicable, VA Form 134, Combination Requisition and Shipping Ticket, travels with the asset throughout the turn-in process.

Process Activity Name: ITAM-4.4 Validate Turn-In Date

Previous Process Activity

ITAM-4.3 Submit Electronic Turn-In Request

Next Process Activity

ITAM-4.5 Coordinate Transfer to Logistics

Description

The IT Asset Manager, or designee, validates that the Automated Engineering Management System/Medical Equipment Report System (AEMS/MERS) record(s) for items on the electronic turn-in have an entry in the "Turn-In Date" field corresponding to the date the electronic turn-in was approved.

Artifacts Used

Automated Engineering Management System/Medical Equipment Report System Equipment Barcode Labels
Electronic Turn-In Request Report
VA Form 0751, Sanitization Certificate
VA Form 134, Combination Requisition and Shipping Ticket

Artifacts Created

Updated Automated Engineering Management System/Medical Equipment Report System Status

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The IT Asset Manager validating the status has been updated in AEMS/MERS serves as a Quality Control Check.VA Form 0751, Sanitization Certificate or if applicable, VA Form 134, Combination Requisition and Shipping Ticket travels with the asset throughout the turn-in process.

Process Activity Name: ITAM-4.5 Coordinate Transfer to Logistics

Previous Process Activity

ITAM-4.4 Validate Turn-In Date

Next Process Activity

ITAM-4.6 Remove Equipment from EIL

Description

The IT Asset Manager, or designee, coordinates and controls the turn-in of all equipment staged for disposition with the Logistics Staff.

Artifacts Used

Electronic Turn-In Request Report
VA Form 0751, Sanitization Certificate
VA Form 134, Combination Requisition and Shipping Ticket

Artifacts Created

Updated Electronic Turn-In Request Report

Responsible Role

IT Asset Manager

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

The IT Asset Manager coordinates the transfer of assets to Logistics Staff via emails, outlook calendar events, and phone calls.VA form 0751, Sanitization Certificate or if applicable, VA Form 134, Combination Requisition and Shipping Ticket, travels with the asset throughout the turn-in process.

Process Activity Name: ITAM-4-6 Remove Equipment from EIL

Previous Process Activity

ITAM-4.5 Coordinate Transfer to Logistics

Next Process Activity

None

Description

The Logistics Staff removes equipment from the Information Technology operations Equipment Inventory List (EIL).

Logistics Staff moves the asset record from 78 series EIL to a Logistics EIL which transfers accountability to Logistics while disposition is pending.

Artifacts Used

Equipment Inventory Listing
Updated Electronic Turn-In Request Report
VA Form 0751, Sanitization Certificate

VA Form 134, Combination Requisition and Shipping Ticket

Artifacts Created

Updated Equipment Inventory Listing

Responsible Role

Logistics Staff

Tools and Websites

Automated Engineering Management System/Medical Equipment Report System Extract Report

Standards

VA Handbook 7002, Logistics Management Procedures

More Info

This activity is a quality check performed to verify that disposed equipment no longer appears on the EIL.VA Form 0751, Sanitization Certificate and if applicable, VA Form 134, Combination Requisition and Shipping Ticket, travels with the asset throughout the turn-in process.

END OF PROCESS