■ Planning

ID	Description	Requirement/Compliance
P-1	PPM should maintain a record of each SEPG entry, with the intended EIL as a required field. A SharePoint list (e.g., Planning-SEPG Tracker) or an Excel export from the SEPG portal can serve as the record.	SEPG accountability, planning transparency, EIL assignment requirement

■ Acquisition (Future Process)

ID	Description	Requirement/Compliance
A-1	A SharePoint list should connect SEPG/EER IDs with new purchase orders. The same list could also track 2237s and other request types.	Procurement traceability, purchase request linkage
A-2	Relevant documents should be attached directly or stored in a dropbox, with links back to the Planning-SEPG Tracker. PPM would then monitor items as they progress.	Contract file completeness, document retention

■ Deployment

ID	Description	Requirement/Compliance
D-1	The MH Flow was created to improve daily process management, not just implants. It has since been used as a national example for implant process improvement. This workflow should now be transitioned into SharePoint lists.	Standardized receiving, national best practice reference
D-2	The EE Request Tracker 1.0 improved OIT-EIL approval handling, reduced email disputes, and streamlined tagging. Over time, reliability declined, prompting the 2.0 overhaul. EE Request Tracker 2.0 will provide stronger OIT-EIL approval tracking and better MH/IMS interfaces.	Approval chain accountability, system reliability
D-3	Within the EE Request Tracker, PPM updates tag status (Created, Applied, Delivered). MH delivers most equipment and should mark it delivered. PPM follows up to ensure completeness of records and updated locations. All parties can log issues in the Comments/Notes field.	Tag traceability, delivery confirmation
D-4	Future: Add a simple automated checklist process for MH to confirm delivery. When tags are marked Applied, items automatically appear in a delivery task list (e.g., MS Planner) for confirmation. If MH intake is SharePoint-based, PO numbers from EE Requests could be matched to MH Intake and linked to Planner tasks.	Delivery accountability, MH confirmation of custody
D-5	Future: Receiving reports should be digitized and uploaded to a Deployment folder. As a short-term solution, MH can forward reports from the print report line in VistA to a dedicated capture email. Automation can convert these into files. These may not be signed, but still provide a semi-automated live record.	Receiving documentation, digital audit trail

■ Maintenance

ID	Description	Requirement/Compliance
M-0*	Upload or drop any produced/received documents into the appropriate dedicated dropbox. Separate dropboxes ensure metadata can be captured automatically.	Document control, metadata capture
M-1	Future: Develop an EE Movement Tracker submission form for customers to report permanent moves (new area, local-EIL, or cross-SL EIL).	Asset movement accountability

M-2	Document and retain all meetings. Use the dedicated dropbox to store the standardized PDF template (Tab E of the current jacket file).	Meeting documentation, compliance recordkeeping
M-3	IMS records inventory results into the Record Inventory tracker and attaches the signed EIL Inventory Report at intake.	Inventory accuracy, signed record retention
M-4	Future: Create a customer-facing ROS Submission form/list. This is only for document submission, not another ROS tracker for IMS to monitor. The form should include a Comments/Notes field for customer elaboration on the ROS as well as IMS notes.	ROS timeliness, audit compliance, dispute resolution
M-5	Future: Automate inventory announcements via list/form or standardized email templates. Track 15–20-day inventory windows and automatically generate Action Item requests.	Inventory cycle compliance, timely notifications
M-6	Use a SharePoint-based Disposition Log for all warehouse intake. Every item must be logged and categorized (Unicor, Scrap, Excess, Transfer). From this log, generate reports (Western Warehouse manifests, scrap poundage by CSN, available excess lists). The upcoming Excess Portal will allow VISN 4 to view items for reutilization.	Excess property visibility, warehouse accountability

■ Disposition (DS)

ID	Description	Requirement/Compliance
DS-0*	Upload or drop any produced/received documents into the appropriate dedicated dropbox. Separate dropboxes ensure metadata is captured automatically.	Document control, metadata capture
DS-1	Future: Create a Turn-In Request Submission form/list. After a customer submits in Vista and gets CMR approval, they also submit via SharePoint. This creates a task record with required details (Transaction #, EIL, Pickup Location, Comments). IMS can then initiate pickup, which places the task into MS Planner for MH drivers as a checklist. Currently, there is no accountability or transfer of custody for MH drivers. This will be the first such process and is designed to be as simple as possible for them.	Custody transfer accountability, turn-in transparency
DS-2	Use a SharePoint-based Disposition Log for all retrieved or delivered turn-ins, ensuring full visibility and traceability.	Final disposition audit trail, property accountability