Department of Veterans Affairs

VA Pittsburgh Healthcare System

PADMD Program Proposal

Nonexpendable Equipment Oversight, Compliance, and Innovation

VA

U.S. Department of Veterans Affairs

Veterans Health Administration

VA Pittsburgh Healthcare System

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PADMD

Transitioning from ‘file chasing’ to true NX Program Management

OIG Findings

The September 2025 OIG audit report underscored a critical concept: national NX accountability is fundamentally compromised. The OIG reported that VHA could not account for 75,500 items valued at $210.9M, about 537,000 items (33%) were in the wrong place, and 62,500 items may not even have been needed. Facilities stretched inventories out as long as 20 months, and from FY22–24, 76,800 items worth $262M were reported missing or damaged, with 915 Reports of Survey (ROS) worth $31.2M left unfinished. Oversight broke down from VA to VISN to the facility level.

Pittsburgh is emblematic of those findings. The same systemic flaws surface daily: ROS buried in emails, turn-ins loosely tracked, disposition logged in spreadsheets, and inventories captured inconsistently. Compliance hinges on inbox traffic and memory, not structure.

PADMD Framework

I propose we take the Equipment Life Cycle Management framework and use it effectively. I’ve reframed it as PADMD — Planning, Acquisition, Deployment, Maintenance, Disposition — because it makes the lifecycle clear, and because it works.

The principle is simple:

Control the information → Control the inventory → Control compliance.

Moving Beyond the Jacket File Tabs

The current/previous model of compliance relied on the jacket file’s tab structure — Tab A (CO delegation), Tab B (delegate), Tab C (training), Tab D (inventories), Tab E (meeting notes, concurrence documentation, saved emails, etc). We’ve already digitized several of these in SharePoint forms and lists, but the tab notion itself is outdated.

The stronger, leaner architecture is to organize everything by function and process into the five PADMD buckets:

- Planning - Acquisition - Deployment - Maintenance - Disposition (DS)

Every document, workflow, and data point belongs in one of these buckets. “This ‘bucket’ is where Pittsburgh’s Planning records are/ this ‘bucket’ is where Pittsburgh’s Acquisition records are/ this ‘bucket is where Pittsburgh’s Deployment records are…etc.” Each file will consist of Metadata (EIL, SL, CO, IMS, etc.). This metadata allows us to view the information in any format we need — by lifecycle stage, by jacket file tab, by compliance requirement, or by EIL (or PO, or tracking number, or SEPG ID or…). We will purge and archive lists to Excel, still searchable in the document library, and deleting them from the active list to keep operations lean without losing history.

This structure makes the “jacket file” look just one of many possible views, powered by metadata. The result is a system that is scalable, auditable, and flexible.

Current Implementations

This isn't theoretical. Pittsburgh has several pieces of PADMD already live:

- Jacket File (Tabs A–C): Active SharePoint form/list captures Custodial Official and Delegate training (Tab C), and holds Delegation of Authority docs (Tabs A and B). Tabs A/B are one-time unless an EIL or personnel change occurs, and the list holds all three tabs in one record.
- Jacket File (Tab D – Inventories): A 'Record Inventory' form/list is live. IMS use either the form directly or a mirrored spreadsheet template. Every result is logged, with the signed inventory report attached on intake. This gives a full digital record of Tab D. It functions now as a supervisor tool, but is ready to automate training due dates and push inventory results outward — something we've never done before.
- Disposition Log: Already running in SharePoint, logging every warehouse intake and categorizing items as Unicor, Scrap, Excess, or Transfer. While the Excess Portal isn't live yet, the log itself is functional and producing reports.
- EE Request Tracker (1.0 → 2.0): Version 1.0 resolved email disputes, tagging delays, and poor recordkeeping. Version 2.0 is being built to strengthen OIT-EIL approvals and provide better MH/IMS interfaces.
- MH Receiving Flow: Built to improve daily operations, functioning successfully at UD campus, it has since been cited nationally as a best practice for implant process improvement.

Next Steps

The foundation is here, but the build must be finished:

- Finish the SharePoint overlay: Complete DS-1 (Turn-In Submission), D-4 (MH delivery checklist), and D-5 (VistA print-line capture) from the PADMD_Flowchart_Key.
- Codify custody transfer: Automate the MH driver checklist so we can finally prove chain-of-custody. This area of operation has been provably broken for years. All it requires is their already-issued-GFE smartphone..
- Harden intake points: Move 0751s, ROS, work orders, and bills of health for excess into structured intake, eliminating email as the "system of record."
- Automate dashboards & notifications: Training due dates, inventory cycles, ROS deadlines — surfaced automatically instead of hidden in inboxes or spreadsheets.

Why This Will Work

Our Customers- the clinics, shops, offices, are professionals too, and they're equally invested in safeguarding documents. Submitting 0751s, ROS, work orders, or bills of health through structured intake isn't an unreasonable burden — it's the natural way. These records always belonged with asset management. This approach simplifies how those records flow to our team.

PADMD provides the structure. SharePoint provides the tool. Metadata provides the flexibility. With this model:

- Every intake point is a form or dropbox, trackable, indexable, archivable, searchable— not an email.
- Every transfer is logged, not assumed.
- Every compliance requirement is tied to a lifecycle checkpoint, not buried in a nest of network driver folders.

This extends beyond Pittsburgh. When we complete the build here, we can demonstrate it VISN-wide and show OIG that NX accountability doesn't have to be an endless cycle of missing files and unfinished surveys.

We can move beyond circular efforts and chasing files, and begin operating a true NX program.

Current State: How PPM Information Flow Works Currently

1. Requests & Communications

- Source: Requests come in primarily by email (Outlook).
- Format: Free-form messages, sometimes with attachments, sometimes just instructions.
- Tracking: Once in the inbox, the request is managed manually by whoever received it.
- Status: No built-in task tracking; completion status must be inferred from follow-up emails or memory.

2. Documentation Flow

- Sources of required documentation:
  - Biomed → sanitation forms, repair/service confirmations.
  - OIT → wipe/clean certs, return-to-service docs.
  - FMS shops → facility-related property docs (repairs, mods, turn-ins).
- Submission method: No current process. Sent as email attachments when requested (if sent at all).
- Storage: Saved by staff into personal or shared folders, often inconsistently.
- Risk: Documentation can be delayed, lost, or never sent.

3. Equipment Lifecycle Tracking

- Tagging: Scan team applies EE tags, confirms assignment.
- EILs: IMS staff update Equipment Inventory Listings manually, often based on paper/email
- confirmations.
- Inventories: Annual/cyclic inventories require pulling together data from multiple disconnected sources (inbox, shared folders, local spreadsheets).
- Disposition:
  - Warehouse/IMS staff process turn-ins.
  - Excess/Unicor/Surplus paperwork (e.g., 0751s, photos) are gathered ad hoc.
  - Final docs are emailed in, sometimes after the fact, and must be chased down.

4. Oversight & Compliance Touchpoints

- QCR: Staff must prepare quarterly compliance packets, manually gathering jacket file materials from
- emails, folders, and spreadsheets.
- OIG: Auditors request cradle-to-grave proof; IMS/supervisors must reconstruct trails from fragmented
- records.
- TG-90: Material handlers rely on training and SOPs, but NX accountability while “in motion” is not
- consistently visible.
- 7002: Requires tagging, inventories, and disposition documents, but in practice compliance depends on staff diligence and follow-through, not system enforcement.

5. Role of Supervisor

The supervisor role under the current state is defined less by oversight and more by gap-filling and firefighting. In lieu of managing to a structured system, the supervisor is forced into constant reaction:

- File Chasing: The supervisor becomes the primary chaser of missing records. When Biomed, OIT, or FMS do not forward required documents, the responsibility to track them down falls on the supervisor. This equates to endless follow-ups, reminder emails, and sometimes manual collection of forms that should have flowed automatically. Compliance hinges on persistence rather than process.
- Inbox Triage: Requests and documents arrive by email with inconsistent formats. The supervisor is left to sift through the inbox, decide what matters, and reassign tasks, (often by forwarding emails or issuing verbal instructions). This causes duplication, dropped handoffs, and little visibility into whether an item was completed. Accountability is fragmented because the inbox, not the system, dictates the work.
- Multi-Role Load: While managing the responsibilities above, the supervisor is concurrently expected to be physically present with IMS staff conducting inventories, while simultaneously overseeing mailroom operations and a reproduction center. The result is a divided role where strategic oversight is traded for reactive juggling. Critical tasks compete for attention, and NX accountability suffers because it is treated as “extra” rather than as the core mission.
- The supervisor’s role has been stretched beyond sustainable limits: half administrator, half field staff, half triage desk. This model may maintain day to day operations, but it fails to establish accountability, sustainability, or compliance.

Future State: Data-Centric, Platform-Agnostic Information Flow

1. Core Principle

Every interaction with an equipment item (NX property) creates data that must flow to PPM.

- 7002 sets the hard requirements for what must be captured.
- TG-90 enforces accountability for "supplies in motion."
- PADMD provides the operational lifecycle language.
- PPM is the central receiving hub.
- QCR and OIG compliance tracking ensures that the system produces complete, cradle-to-grave no gap accountability.

The tool could be SharePoint, another database, or even a custom app — the design is software-agnostic. The underlying structure is what matters.

2. Lifecycle Data Flow (PADMD Lens + Oversight)

PADMD Stage	What Happens	What To Be Captured	7002 Requirement	TG-90 Accountability	QCR / OIG Oversight
Planning	SEPG requests, Delegation of Authority, CO/delegate training	SEPG entries with EIL, delegation docs (Tabs A–C), training records	7002 requires accurate custodian assignment and authority	CO assignment, delegate approval, EIL linkage	Planning accountability, custodian documentation
Acquisition	Requests approved, funding and POs issued	SEPG/EER IDs linked to PO, 2237s, requisitions, supporting docs	7002 requires linkage of requests to accountable items	Approvals logged, procurement traceable to requests	Contract file completeness, acquisition documentation
Deployment	Equipment tagged, delivered, and received	EE Request Tracker status updates, delivery receipts, receiving reports	7002 requires tagging and record updates at deployment	Custody transfer, delivery confirmation	Receiving documentation, delivery audit trail
Maintenance	Inventory, ROS, movement requests, training refresh	Inventory Tracker results, signed EIL reports, ROS submissions, meeting notes	7002 requires annual inventory and reporting	Inventory accuracy, ROS initiation, issue resolution	ROS timeliness, inventory compliance, audit readiness
Disposition (DS)	Turn-in, warehouse intake, disposal, excess reporting	Turn-In Requests, 0751s, bills of health, disposition log entries	7002 requires documentation of disposition and ROS	Custody release, chain-of-custody for MH drivers	Final disposition audit trail, excess visibility

3. Structural Requirements (Platform-Agnostic)

Any system implementing this must provide:

1. Capture – Record lifecycle data at each point of action.
2. Flow – Data must route automatically to PPM, not rely on email hand-offs.
3. Storage – A secure repository (the "jacket file") that ties all lifecycle docs/data to the asset.
4. Visibility – Dashboards/reports that show current PADMD stage, open tasks, and compliance status.
5. Traceability – Cradle-to-grave audit trails available on demand.

4. Oversight Alignment

- 7002: This structure guarantees all required records exist, tied to the asset, from requisition through disposal.
- TG-90: Ensures material handlers account for NX while "in motion" — the system tracks not just where it is but what stage it's in.
- QCR: Quarterly reviews become a matter of pulling reports, not chasing emails — stage completeness is visible.
- OIG: Auditors can be shown a complete, chronological jacket file at each PADMD stage, proving cradle-to-grave compliance.

5. Role of PPM in Future State

- Central collector and owner of data. Every department (Biomed, OIT, FMS) feeds their required documentation into the system, not into an inbox.
- Supervisors and IMSs focus on validation, oversight, and inventories — eliminating inefficient uses of time and payroll hours.
- PPM defines the standard flow; the platform enforces it.

Future State: Data-Centric, SharePoint-Platform Information Flow

1. Core Principle

Every interaction with a nonexpendable (NX) item creates data that must flow into SharePoint.

- 7002 sets the hard requirements for what must be captured.
- TG-90 enforces accountability for “supplies in motion.”
- PADMD provides the lifecycle framework (Planning, Acquisition, Deployment, Maintenance, Disposition).
- PPM is the central hub — not an inbox, but a SharePoint environment of lists, libraries, and Power Automate flows.
- QCR and OIG oversight is satisfied because SharePoint maintains a full audit trail, complete with metadata, timestamps, and cradle-to-grave linkage.

This is not platform-agnostic. The platform is Microsoft SharePoint Online, with supporting automation in Power Automate and reporting in Power BI.

2. Lifecycle Data Flow (PADMD Lens + Oversight in SharePoint)

PADMD Stage	What Happens	What Must Be Captured	SharePoint Implementation	Oversight
Planning (P)	SEPG requests, Delegations of Authority, CO/ delegate training	SEPG entries with required EIL, delegation docs (Tabs A–C), training records	SharePoint list (Planning-SEPG Tracker) with required metadata fields and file attachments	7002 custodian assignment; TG-90 EIL linkage; QCR planning accountability
Acquisition (A)	Requests approved, funding and POs issued	SEPG/EER IDs linked to PO, 2237s, requisitions, supporting docs	Acquisition Tracker list with lookup to Planning list; dropbox libraries for PO docs	7002 procurement linkage; TG-90 approvals; contract completeness
Deployment (D)	Equipment tagged, delivered, and received	EE Request Tracker status (Created, Applied, Delivered), delivery receipts, receiving reports	EE Request Tracker 2.0 in SharePoint, linked to Planner checklists; capture email auto-loads VistA reports into a deployment library	7002 tagging; TG-90 custody confirmation; OIG receiving audit trail
Maintenance (M)	Inventory, ROS, movement requests, training refresh	Record Inventory results, signed EIL reports, ROS submissions, meeting notes	Record Inventory Tracker list with file upload; ROS Submission form; automated notifications for training due dates	7002 annual inventory; TG-90 accuracy; ROS timeliness; audit readiness
Disposition (DS)	Turn-in, warehouse intake, disposal, excess reporting	Turn-In Requests, 0751s, bills of health, disposition log entries	Disposition Log SharePoint list; Power Automate routes submissions to Planner for MH drivers; Excess Portal library (in development)	7002 disposition documentation; TG-90 custody release; OIG final audit trail

3. Structural Requirements (in SharePoint)

Any SharePoint-based implementation must provide:

1. Capture – Every PADMD stage has a SharePoint list/form for intake, with required metadata (EIL, SL, CO, stage, date).
2. Flow – Power Automate ensures documents flow to PPM automatically. No reliance on email forwarding.
3. Storage – Jacket file = SharePoint libraries tied to each list item. Metadata replaces tabs (P/A/D/M/DS). Old records are archived to Excel/CSV automatically.
4. Visibility – Power BI dashboards connected to SharePoint show PADMD stage, open tasks, and compliance status.
5. Traceability – SharePoint versioning, permissions, and audit logs provide cradle-to-grave history. Every file and record has a permanent trace.

4. Oversight Alignment (with SharePoint functions)

- 7002: Required records are enforced by mandatory metadata fields in SharePoint forms. No record can move forward without EIL, custodian, or disposition type filled in.
- TG-90: SharePoint workflows and Planner checklists ensure supplies in motion (delivery, pickup, transfer) are confirmed by the responsible handler.
- QCR: Quarterly reviews pull directly from SharePoint dashboards. Supervisors don't chase emails; they export compliance reports with one click.
- OIG: At any point, auditors can be shown a complete, chronological jacket file in SharePoint filtered by asset, EIL, or PADMD stage.

5. Role of PPM in Future State (with SharePoint)

- Central Collector: Every department (Biomed, OIT, FMS, customer services) submits directly into SharePoint forms/lists. The inbox is eliminated from the process.
- Supervisors: Move from file chasers to oversight managers. They utilize dashboards to see what's late, what's missing, and what's complete. Exception management replaces inbox triage.
- IMS: Focus on field inventories and data validation, not paper handling. Inventory results are submitted directly through SharePoint forms, attaching signed reports on intake.
- PPM Standardization: PPM defines the flow once in SharePoint. The system consistently enforces compliance.

A Unified Lifecycle System for Non-Expendable (NX) Property

Planning through Disposition (PADMD), Anchored in TG-90 and 7002 Principles

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Executive Summary

The Veterans Health Administration manages thousands of pieces of non-expendable (NX) property each year. Each item represents a clinical, financial, and compliance responsibility that extends from the moment it is conceived as a need to the point it is finally retired.

Currently, fragmented workflows, scattered documents, and inconsistent information capture force PPM staff to spend valuable time chasing paper and reconciling gaps. This creates compliance risk under QCR and OIG review, and it distracts from the mission of stewardship.

This white paper presents a unified lifecycle system for NX assets. Built on the **PADMD framework—Planning, Acquisition, Deployment, Maintenance, and Disposition**—the system integrates **TG-90 material handling principles** with PPM information governance. It ensures every handoff is documented, every scan point is captured, and every record flows into a single, auditable asset file.

The result is a lifecycle system that:
- **Eliminates chasing documents** by ensuring all flows point to PPM.
- **Establishes continuous accountability** through custody sheets and scan checkpoints.
- **Creates audit-ready Jacket Files** that satisfy QCR and OIG requirements.
- **Aligns with modern platforms** (SharePoint, Power Automate, SQL) while remaining technology-agnostic in concept.

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1. Foundations of the System

PADMD Lifecycle

- **Planning → Acquisition → Deployment → Maintenance → Disposition**.
- Each phase has a defined set of actions, documents, and accountability measures.
- Together they form a closed loop that leaves no asset undocumented.

TG-90 and 7002 as Baseline

TG-90 and 7002 provide the baseline for accountability. TG-90, though dated, establishes enduring custody and documentation principles. VA Handbook 7002 codifies these into policy, requiring accurate records at every lifecycle stage. The proposed system embeds TG-90's custody standards and 7002's accountability rules within PADMD, creating a structured, auditable process. This not only ensures local compliance, but also provides VISN and OIG with a clear, standardized view of NX accountability.

The Jacket File

Each NX asset has a **Jacket File**—a digital folder or container that travels with it through the entire lifecycle. Every action, document, and scan checkpoint attaches here. When an asset is archived, the Jacket File tells the complete story: who planned it, who received it, who used it, how it was maintained, and how it was finally disposed.

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2. Planning

Planning establishes accountability before an asset even arrives.

- **SEPG (Strategic Equipment Planning Guide):** Ensures alignment between clinical priorities and equipment strategies.
- **EER (Equipment Evaluation Request):** The tactical entry point for a new asset. It justifies need, ties the asset to an EIL, names a custodian, and routes for approval.

Outputs of Planning:

- Approved EER package.
- Funding authorization.
- Assigned EIL and custodian required.

Information Flow:

- All SEPG analyses, EERs, and approvals populate the Planning bucket of the Jacket File.
- By the time an item is ordered, it already has a digital footprint anchored in Planning.

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3. Acquisition

Acquisition bridges the plan to the physical asset.

- **Ordering:** Purchasing executes the approved EER.
- **Receiving at Dock:**
  - Carrier delivery is logged with carrier name, tracking number, dock location, and timestamp.
  - Every package is scanned to create a digital trail (“DeliveryScans”).
- **Custody:**
  - Clean PO: Received in VistA with a three-way check; custody report generated in duplicate.
  - Invalid PO: Escalated to Purchasing and held until resolved.
  - Implants: Recorded in TrackCore, shipment ID attached to custody sheet.
  - Prosthetics: Routed per prosthetics procedures; often batch processed.
  - No PO: Documented with an alternate custody sheet, signed by the recipient.

Outputs of Acquisition:

- Purchase orders, invoices, and receiving reports.
- Custody sheets for all deliveries, whether standard or alternate.
- Tracking data from scans and logs.

Information Flow:

- Acquisition documents and scan records enter the Jacket File.
- Each item’s record now connects back to its Planning phase and forward to its custodian.

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4. Deployment

Deployment is the point of transfer from storage into service.

- **Custody at Delivery:** Assets are delivered to their assigned custodian or service. Custody sheets document the transfer (ink or electronic signature).
- **Tagging:** Each asset receives an EE number and is officially tied to its assigned EIL.
- **Acceptance:** Custodians acknowledge responsibility by signing custody documentation.

Outputs of Deployment:
- Custody sheet showing the transfer to custodian.
- EE tag record linking the asset to its EIL and custodian.
- Tracking confirmation of final delivery.

Information Flow:
- All deployment records flow into the Deployment bucket of the Jacket File.
- The system now shows a full chain: from justification (Planning) through physical delivery to a responsible party.

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5. Maintenance

Maintenance sustains the asset during its service life.
- **Biomed & OIT:** Provide preventive maintenance, calibrations, repairs, and sanitation.
- **FMS Shops:** Electronics, plumbing, carpentry, refrigeration, and other trades handle facility-side work orders involving NX assets.

Requirement:
- **All completed work orders on NX assets must be deposited into the PPM Dropbox.** This ensures a single intake point for records, eliminating silos across Biomed, OIT, and FMS.

Outputs of Maintenance:
- Work orders (all shops).
- Preventive maintenance logs.
- Calibration certificates.
- Sanitation forms (e.g., 0751s).

Information Flow:
- All records and completed work orders are captured in the Maintenance bucket of the Jacket File.
- PPM ensures continuous history is available for compliance and audit.

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6. Disposition

Disposition is the formal close of the asset's lifecycle.
- **Turn-In Initiation:** Custodian submits a turn-in request.
- **Pickup & Custody:** Custody sheets record the return; assets are scanned and logged as they leave service, creating the same digital footprint as at intake.
- **Final Routing:** Assets move to warehouse, Unicor, or excess. Sanitation forms and photos confirm proper processing.

Outputs of Disposition:
- Custody sheets at pickup.
- Scan logs of turned-in assets.
- Sanitation documents and final photos.

Information Flow:
- All disposition documentation populates the Disposition bucket.
- Once verified, the Jacket File is closed and archived, leaving a complete, auditable lifecycle.

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7. The Information Backbone

At every stage, two things are captured:

1. **Documents:** Custody sheets, approvals, orders, work orders, sanitation forms.
2. **Scan/Tracking Data:** Delivery scans at receipt, tracking logs at turn-in.

Together, they provide both **physical custody** and **digital custody;** 100% digitization is possible.

The **Jacket File** is the central archive:

- Planning: SEPG, EER, approvals.
- Acquisition: Orders, invoices, custody sheets, scan records.
- Deployment: Custody transfers, EE tags.
- Maintenance: All work orders (via PPM Dropbox), sanitation forms, service records.
- Disposition: Turn-in custody, final scans, sanitation, photos.

This approach ensures that every stage of the lifecycle is documented and tracked.

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8. Compliance and Oversight

This system meets or exceeds oversight expectations by:

- Embedding **TG-90 custody principles** at every handoff.
- Documenting **Planning discipline** through SEPG and EER.
- Capturing both **documents and scan checkpoints** at receipt and turn-in.
- Requiring **all work orders** to be centrally filed in the PPM Dropbox.
- Ensuring **QCR and OIG readiness** with a continuous, auditable chain of accountability.

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Conclusion

This unified NX lifecycle system creates one continuous thread of accountability. From initial planning through final disposition, every action is documented, every transfer has a custody sheet, every movement is scanned, and every record flows into a single Jacket File owned by PPM.

The system is technology-agnostic: today's spreadsheets, tomorrow's SharePoint lists, or a future SQL database all serve the same flow. The process itself does not change, only the tools used to support it.

The result is a **compliant, efficient, and audit-ready system** that effectively eliminates the practice of document chasing, fosters and strengthens inter-department stewardship, and ensures the integrity of NX property management across the enterprise.

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NX Information Flow – Master Overview

PADMD-Based Information Control for Nonexpendable Equipment

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Purpose & Vision

We control the information → We control the inventory → We satisfy compliance.

This Master Overview establishes a data-first, platform-agnostic plan for managing nonexpendable equipment (NX) through PADMD (Planning, Acquisition, Deployment, Maintenance, Disposition). It eliminates file-chasing by enforcing information flow at every stage, aligning directly with OIG and QCR requirements for compliance, oversight, and accountability.

Core Principles

- Control the information, control the inventory, satisfy compliance.
- Every physical action produces a data event.
- Transparency: Any stakeholder can see status without chasing files.
- Compliance: VA Handbook 7002, Directive 1761, VISN QCR, and OIG findings baked into workflows.
- Adaptability: Platform-agnostic; dashboards and UI layers are windows, not the engine.
- Accountability: IMS, COs, Scan, and Material Handling carry defined roles in data integrity.

Stakeholders & Roles

- Internal NX: Supervisor, IMS, Scan Team, Material Handling.
- External: OIT, Biomed, FMS, clinical/admin services.
- Leadership: Facility Director, VISN, auditors.
- Oversight Anchors: Accountable Officer (AO), Custodial Officers (COs).
- Material Handling integrated at key custody points (receipts, moves, turn-ins).

PADMD Structure & Compliance Mapping

- Planning: SEPG prep, OA3, IMS assignments, strategic forecasts. Ensures EILs are set before acquisition.
- Acquisition: Requisitions, approvals, tagging at receipt. Prevents ghost assets.
- Deployment: IMS update all locations. COs/delegates must request changes through intake. MH logs moves.
- Maintenance: Annual inventories, no exceptions. <95% triggers 6-month re-check. BoH reports required for re-use; shops provide, NX does not chase.
- Disposition: Turn-ins, inspections, ROS, excess, Unicor, recycling. New tools unify processes; ROS closed within 60 days.
- Contingency: Outage-proof intake and tracking; reconciliation back into PADMD.

Governance & Oversight

- Quarterly governance reviews to update taxonomy and forms.
- EIL assignments validated through scheduled reviews.
- Annual review with AO, COs, and leadership on inventories, ROS, compliance performance.
- Facility Directors and AOs cannot defer oversight; accountability enforced.

Dashboards (Proof-of-Concept Windows)

- Dashboards are not the system; they are windows into the system.
- PPM monitors: Requests, inventories, dispositions by IMS/EIL.
- OIT counters: Simple in/out tallies.
- ROS view: Per-IMS snapshot tied to approval portal.
- Libraries/metadata can evolve into richer Service Line or EIL dashboards.
- SharePoint is just the UI. The real control is the enforced data flow.

OIG & QCR Alignment
- Lost Assets: Prevented through tagging + annual inventory.
- Wrong Locations: IMS update; CO requests required for changes.
- Idle/Unused Assets: Planning + Disposition pipelines force transfer, reuse, or disposal.
- Inventory by Exception: Eliminated. Annual, no exception; <95% = re-check.
- ROS: Centralized, tracked, closed within 60 days.
- Oversight: Facility Directors/AOs act on live compliance data.

Contingency Operations
- Trigger: System outage.
- Intake: Controlled templates + contingency tracker.
- Reconciliation: Post-outage migration back into PADMD.

Bottom Line
- Platform-agnostic, data-centric, compliance-driven system.
- Material Handling integrated logically at custody points.
- IMS own SEPG and EIL accountability.
- COs initiate all changes via intake; shops provide BoH for re-use/Excess.
- Dashboards remain proof-of-concept windows; enforced data flow is the system.
- We control the information → We control the inventory → We satisfy compliance.

Section I – Purpose & Vision

We control the information → We control the inventory → We satisfy compliance.

The purpose of this plan is to establish a clear, disciplined system for managing nonexpendable equipment (NX) at the Pittsburgh VA. This section defines the vision: moving away from fragmented, file-chasing practices into a structured, process-based flow of information. The PADMD lifecycle (Planning, Acquisition, Deployment, Maintenance, Disposition) provides the backbone, ensuring that every action generates a data record and every record ties back to compliance requirements.

Vision
Our vision is simple and direct: when we control the flow of information, we control the assets. When assets are under control, compliance follows naturally. This system is built to prevent the very failures that OIG and VISN QCR reviews have repeatedly identified — lost equipment, inaccurate locations, idle assets, incomplete Reports of Survey, and inconsistent custodial oversight.

Key Objectives
- Replace ad-hoc file structures with a lifecycle-driven PADMD framework.
- Ensure every physical action produces a corresponding data entry.
- Embed compliance into daily operations — not as an afterthought, but as the default.
- Provide transparency so stakeholders can see the status of assets and requests without chasing files.
- Position NX as the central authority for information flow, not a back-office afterthought.
- Maintain platform-agnostic design: dashboards and automation are windows, not engines.

Why Now
OIG's recent audit findings mirror the weaknesses highlighted in our QCR: equipment lost, records inaccurate, inventories skipped, and ROS left incomplete. These are not abstract failures — they affect patient care, facility readiness, and fiscal responsibility. By implementing now, we ensure Pittsburgh is not only compliant, but also leading in how NX is managed across the VA system.

Strategic Impact
This plan is not a software project or a SharePoint configuration. It is a structural, compliance-first approach to how Pittsburgh VA handles every piece of NX equipment. By embedding PADMD discipline, we remove the guesswork, enforce accountability, and eliminate the gaps OIG called out. Leadership gains visibility, IMS gain structure, Material Handling gains clarity, and compliance is satisfied.

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We control the information → We control the inventory → We satisfy compliance.

Section II – Core Principles

The foundation of the NX information flow model rests on a set of core principles. These principles are not abstract ideals — they are practical rules for how data, equipment, and compliance interconnect. Each principle drives behaviors across IMS, COs, Material Handling, and customer shops, ensuring accountability and eliminating blind spots.

Principle 1: Control the Information, Control the Inventory, Satisfy Compliance
Every action taken with an NX asset must generate a data record. This turns accountability from an afterthought into a built-in safeguard. By locking control to information flow, we ensure that compliance is a natural byproduct of operations — not a separate, manual task.

Principle 2: Every Physical Action Produces a Data Event
From receipt at Material Handling to deployment by IMS, to relocation requests from COs, to final disposition — each step must be logged. This ensures the asset lifecycle is transparent and auditable, closing the gaps that OIG identified in past audits.

Principle 3: Transparency Without Chasing Files
Stakeholders should never have to chase information. Whether through a dashboard, a report, or a filtered view, data must be available on demand. This principle builds trust across leadership, auditors, and operational staff.

Principle 4: Compliance Embedded in Operations
VA Handbook 7002, Directive 1761, and VISN QCR expectations are not external checklists. They are embedded directly into workflows. Inventories occur annually without exception. ROS cases close in 60 days. Custodial Officers validate all requests. Compliance is enforced by structure, not preference.

Principle 5: Platform-Agnostic, System-First Design
SharePoint, Power Automate, or any future tool is just a user interface. The enforced flow of information is the true system. This ensures longevity and flexibility — the structure survives even as platforms change.

Principle 6: Clear Roles and Accountability
IMS, COs, Material Handling, and customer shops all carry defined responsibilities. IMS manage records and locations, COs initiate changes, shops provide Bills of Health, and Material Handling ensures custody is documented. This clarity prevents overlap, excuses, and gaps in accountability.

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Core principles drive discipline. Discipline drives compliance.

Section III – Stakeholders & Roles

For the NX information flow system to function, responsibilities must be clear. Every stakeholder — internal, external, and leadership — has a defined role in the PADMD lifecycle. Clarity of roles eliminates gaps, prevents duplication of effort, and ensures accountability trails are unbroken.

Internal Stakeholders

• Supervisor – Oversees NX program execution, ensures compliance checkpoints are met, and enforces information flow discipline.
• Inventory Management Specialists (IMS) – Maintain PADMD records, update locations, execute inventories, and monitor requests. IMS are the primary operators of the system.
• Scan Team – Conducts equipment scans across facilities, verifying tagging, location accuracy, and reconciliation with system records.
• Material Handling (MH) – Handles physical custody at receipt, staging, transfers, and turn-ins. Each action by MH must generate a corresponding data record in the system.

External Stakeholders

• OIT – Provides technical clearance and inspection for IT equipment.
• Biomed – Provides technical clearance and inspection for medical equipment.
• FMS Trades (plumbing, electrical, electronics, etc.) – Provide Bills of Health for reusable equipment and support technical inspections.
• Clinical and Administrative Services – End users of equipment, responsible for initiating requests and complying with reporting requirements.

Leadership Stakeholders

• Facility Director – Holds ultimate accountability for NX compliance at the facility. Must review compliance metrics and cannot defer oversight.
• VISN Leadership – Provides regional oversight, ensuring Pittsburgh aligns with VISN and VA-wide requirements.
• Auditors (OIG, QCR, Internal) – External verification of compliance through data records, dashboards, and reports.

Oversight Anchors

• Accountable Officer (AO) – Assigned official responsible for NX oversight at the facility level.
• Custodial Officers (COs) – Assigned to each EIL, personally responsible for the equipment listed under their control. COs or their delegates must submit requests for changes (relocation, transfer, etc.) via intake forms, ensuring NX maintains authoritative control of the data.

Accountability Trail

The accountability trail is only complete when every role fulfills its responsibility: IMS manage and update the system, COs request changes, MH documents custody, shops provide Bills of Health, and leadership reviews compliance. Any missing link weakens compliance — therefore, accountability is enforced by structure, not choice.

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Clear roles create clear accountability. Accountability creates compliance.

Section IV – PADMD Structure & Compliance Mapping

The PADMD lifecycle — Planning, Acquisition, Deployment, Maintenance, and Disposition — is the backbone of the NX information flow model. Each stage creates, captures, or updates data records that directly align with OIG and QCR compliance requirements. By enforcing PADMD discipline, every NX asset is accounted for from entry to final disposition.

Planning

Planning anchors the lifecycle. It includes SEPG preparation, OA3 readiness, IMS assignments, and strategic forecasting through the Equipment Committee. IMS are expected to be experts in SEPG, ensuring that equipment cannot progress without an assigned EIL. This closes the gap where assets historically entered the system with no custodial assignment. Planning also drives five-year replacement strategies and prevents overbuying that leads to idle assets.
Compliance tie: Ensures assets are tied to EILs early, prevents idle or untracked equipment, and satisfies QCR demands for forward planning.

Acquisition

Acquisition covers requisitions, approvals, and receiving. Every NX asset is EE-tagged by Material Handling before deployment. Emergency purchases are documented with the same rigor as planned acquisitions. All assets are linked to an EIL at the moment of tagging, eliminating the possibility of ghost assets.
Compliance tie: Guarantees tagging and accountability at entry, addressing OIG's findings of unaccounted equipment.

Deployment

Deployment is where assets are placed into service. IMS are responsible for updating locations in the system. Custodial Officers (or their delegates) are required to submit requests for any changes (relocations, transfers, loans, etc.) through controlled intake forms. Material Handling logs physical movements, ensuring every relocation is paired with a data entry.
Compliance tie: Eliminates OIG's identified problem where one-third of assets were not at their recorded location.

Maintenance

Maintenance enforces accountability throughout the asset's useful life. Annual inventories are mandatory, with no exceptions. Any EIL falling below 95% accuracy must undergo a re-check within six months. Loaned equipment is tracked through a formal loan registry. For equipment deemed reusable, Bills of Health are required from OIT, Biomed, or FMS shops. NX does not chase these reports — they must be submitted with the asset.
Compliance tie: Prevents idle or unsafe assets from circulating, addresses OIG concerns with incomplete inventories, and enforces accuracy standards.

Disposition

Disposition governs the retirement of assets. This includes turn-ins, inspections, ROS, Excess, Unicor, recycling, and final disposal confirmations. Pittsburgh's new tools unify previously scattered processes into a single, robust workflow. ROS cases are tracked through initiation, approval, and closure, with strict enforcement of 60-day completion. Excess postings require Bills of Health, ensuring only verified equipment moves forward.
Compliance tie: Resolves OIG findings of incomplete or missing ROS cases and prevents unverified assets from re-entering circulation.

Contingency

Contingency operations ensure accountability continues even during system outages. Controlled templates and a master contingency tracker (Uber-Tracker) capture intake during downtime. After restoration, records are migrated back into PADMD to maintain an unbroken chain of custody.

Compliance tie: Guarantees auditors see continuity of records and no accountability gaps, even during outages.

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PADMD turns scattered processes into a single lifecycle. Every stage enforces compliance.

Section V – Governance & Oversight

Governance is the structure that enforces compliance, ensures continuous improvement, and eliminates the possibility of oversight being treated as optional. Without structured governance, accountability erodes. This section defines the cadence and responsibilities for governance and oversight.

Quarterly Governance Reviews

Every quarter, the NX Supervisor and IMS team will review forms, metadata taxonomy, and process flows. The purpose is to identify outdated fields, compliance gaps, or new requirements from VISN or VA Central Office. Adjustments are logged, documented, and communicated to all stakeholders.

EIL Assignments Validation

Custodial Officer (CO) assignments must be validated on a scheduled basis. NX will maintain a master EIL list that ties each EIL to a CO and alternates. This ensures custodial responsibility is always current, preventing gaps caused by personnel turnover or unreported delegation changes.

Annual Leadership Review

Once a year, the Accountable Officer (AO), Facility Director, and COs will participate in a joint compliance review. This review covers:

- Inventory accuracy rates by EIL
- Reports of Survey status and closure timeliness
- Disposition case throughput
- Compliance with Bills of Health requirements
- Any exceptions identified during VISN or OIG audits

The annual review provides leadership with a clear, data-backed picture of compliance.

Oversight Enforcement

Oversight is not optional. Facility Directors and AOs are expected to actively review and act on compliance data. The system enforces this by surfacing metrics directly tied to OIG findings — missed inventories, incomplete ROS, idle equipment, and inaccurate locations. By making oversight visible and unavoidable, leadership accountability is preserved.

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Governance ensures discipline. Discipline ensures compliance.

Section VI – Dashboards (Proof-of-Concept Windows)

Dashboards are not the system. They are windows into the system. They provide visibility into the compliance-driven data flow that PADMD enforces. While still in development, Pittsburgh's dashboards already provide proof of concept: basic monitors, counters, and views that can expand as the system matures.

PPM Monitors

PPM dashboards track requests, inventories, and dispositions by IMS or EIL. These monitors provide at-a-glance awareness of workload distribution and compliance status. They serve as operational tools for supervisors and IMS to manage day-to-day execution.

OIT Counters
The OIT-focused dashboards are intentionally simple: in/out tallies. This clarity reinforces the idea that dashboards don't need to be complex to provide value. They are tools to confirm compliance checkpoints are being met without burdening staff.

Reports of Survey (ROS) View
ROS dashboards display per-IMS snapshots of active cases and their statuses. These views are tied directly to the official ROS approval portals, ensuring data integrity. This feature ensures that no ROS can be forgotten or delayed past its 60-day requirement without visibility.

Libraries & Metadata Expansion
As metadata discipline is enforced, libraries can evolve to provide Service Line and EIL views. These views mimic traditional jacket files but are powered by structured data rather than manual filing. This evolution provides leadership with familiar outputs while preserving system integrity.

UI ≠ System
The dashboards exist only to display what PADMD already enforces. SharePoint or any other UI layer is replaceable — the data structure is not. This principle preserves long-term resilience of the system, regardless of platform.

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Dashboards are proof-of-concept windows. The real control is the enforced data flow.

Section VII – OIG & QCR Alignment
OIG audits and VISN QCR reviews consistently identify the same weaknesses in NX management: lost assets, inaccurate locations, idle equipment, incomplete inventories, and unresolved Reports of Survey. The PADMD framework directly addresses each of these findings. This section maps OIG and QCR expectations to the practices embedded in our system.

Lost or Unaccounted Assets
OIG identified tens of thousands of unaccounted NX items across facilities. Our solution: assets are tagged upon receipt by Material Handling, entered into the system at acquisition, and verified annually by IMS. There is no entry into service without a tag and no exemption from inventory. Compliance is ensured by closing the loop between acquisition, deployment, and maintenance.

Wrong or Inaccurate Locations
Audits revealed nearly one-third of assets were not found at their recorded location. Our solution: IMS are solely responsible for updating location records, while COs must submit formal requests for changes. Material Handling logs custody events during moves, ensuring that every relocation is paired with a data entry. Silent moves are eliminated.

Idle or Unused Assets
QCR highlighted excessive idle and unused equipment. Our solution: Planning ties every acquisition to SEPG, preventing purchases without identified custodians. Disposition processes require shops to provide Bills of Health before posting to Excess, ensuring reuse decisions are based on verified condition. Idle assets are flagged for transfer, reuse, or disposal.

Inventory by Exception Loopholes
Historically, facilities used exceptions and maintenance records to avoid annual inventory checks. Our solution: every item is inventoried annually without exception. Any EIL falling below 95% accuracy triggers a mandatory re-check within six months. Compliance is enforced as part of the Maintenance stage.

Reports of Survey (ROS)
OIG reported unresolved or missing ROS cases valued in the millions. Our solution: ROS are managed as structured workflows with initiation, approval, and closure steps. Cases must close within 60 days, and dashboards provide per-IMS visibility into active cases until completion.

Leadership Oversight
Audits consistently find directors and accountable officers deferring responsibility. Our solution: governance enforces quarterly reviews, annual leadership reviews, and live metrics. Facility Directors and AOs cannot defer oversight because compliance metrics are surfaced directly, and inaction is visible to auditors.

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Every OIG and QCR gap is tied directly to a PADMD practice. This is not theory — it is control by design.

Section VIII – Contingency Operations
Contingency operations ensure NX accountability continues even when systems are unavailable. Downtime cannot create blind spots. If SharePoint, Power Automate, or other platforms are offline, we fall back to controlled email templates and the Uber-Tracker spreadsheet. Every request is still logged, tracked, and reconciled once systems are restored.

Trigger
Contingency procedures are activated during outages of SharePoint, Power Automate, or any NX tracking platform. Activation is immediate — there is no gap in accountability.

Email Templates with Unique IDs
All contingency requests must be submitted using pre-set email templates. Each template requires a standardized subject line with a unique ID. This ensures consistency, searchability, and continuity when migrating back into PADMD.
Subject Line Format: [PPM-<TYPE>-####] – <Short Description>
- PPM-ERQ-2025-0147 – New Monitor for OR
- PPM-TRN-2025-0083 – Turn-in Request, Lab Equipment
- PPM-ROS-2025-0021 – Missing Ultrasound Machine

The body of the template includes request type, EIL, CO/requestor name, IMS assigned, and a brief description of the action. This standardization eliminates the ambiguity that typically plagues email-based submissions.

Uber-Tracker Spreadsheet
IMS log every contingency email into the Uber-Tracker. The spreadsheet is the single source of truth during outages. Each row corresponds to the unique ID in the subject line, ensuring no request can be lost.
Core Uber-Tracker Columns:
- Unique ID (from subject line)
- Request Type
- Requestor (CO)
- Date Received

- Assigned IMS
- Status (Active/Complete/Reconciled)
- Linked PADMD Folder (after restoration)

Reconciliation
Once systems are restored, IMS migrate all logged requests into their proper PADMD folders. The unique ID ensures seamless linkage between the contingency records and permanent records. Reconciliation is required within 48 hours of system restoration.

Compliance Tie
This process guarantees that every NX action is captured, regardless of system availability. Auditors see a complete, unbroken trail of accountability — no excuses, no gaps.

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Even when systems fail, accountability does not. Unique IDs and the Uber-Tracker keep control unbroken.

Section IX – Bottom Line

The NX information flow model is built to eliminate uncertainty, enforce compliance, and restore confidence in equipment accountability at the Pittsburgh VA. It is not a software project or a filing exercise — it is a structural system that ties every physical action to an information record.

Key Takeaways
- PADMD (Planning, Acquisition, Deployment, Maintenance, Disposition) is the backbone. Every action produces a data record tied to compliance.
- Material Handling is integrated at custody points, ensuring custody changes are logged.
- IMS maintain data integrity and execute inventories with zero exceptions.
- Custodial Officers initiate all changes via controlled intake — no silent moves.
- Shops provide Bills of Health for reusable or excess equipment; NX does not chase compliance inputs.
- Dashboards are proof-of-concept windows. The real control is the enforced data flow.

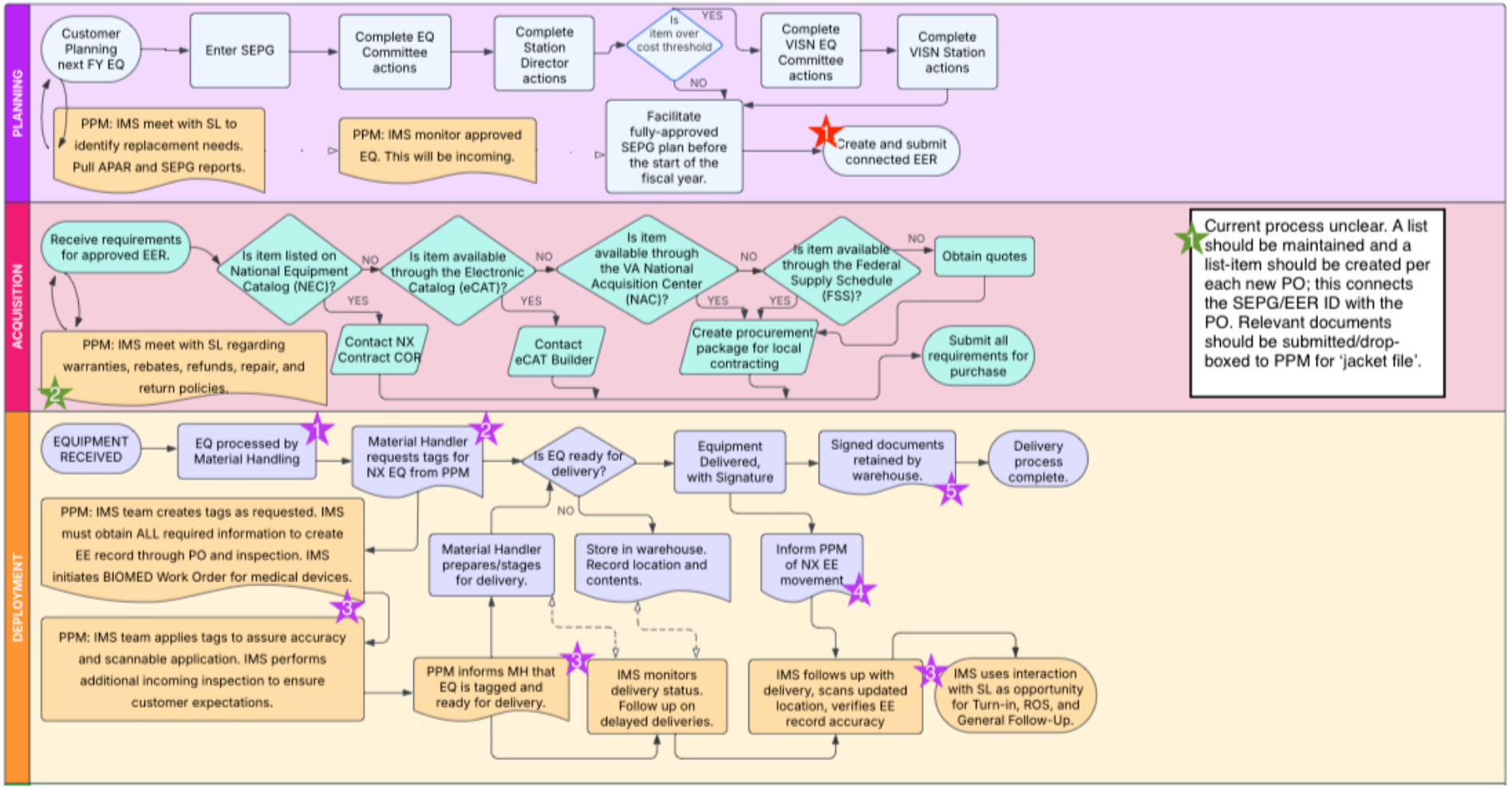
What This Means for Pittsburgh VA
OIG and QCR findings are resolved by design, not by patchwork. Leadership retains visibility through dashboards and reports, while NX retains control of the process. Compliance is not a burden added on top of operations — it is the natural output of how we operate.

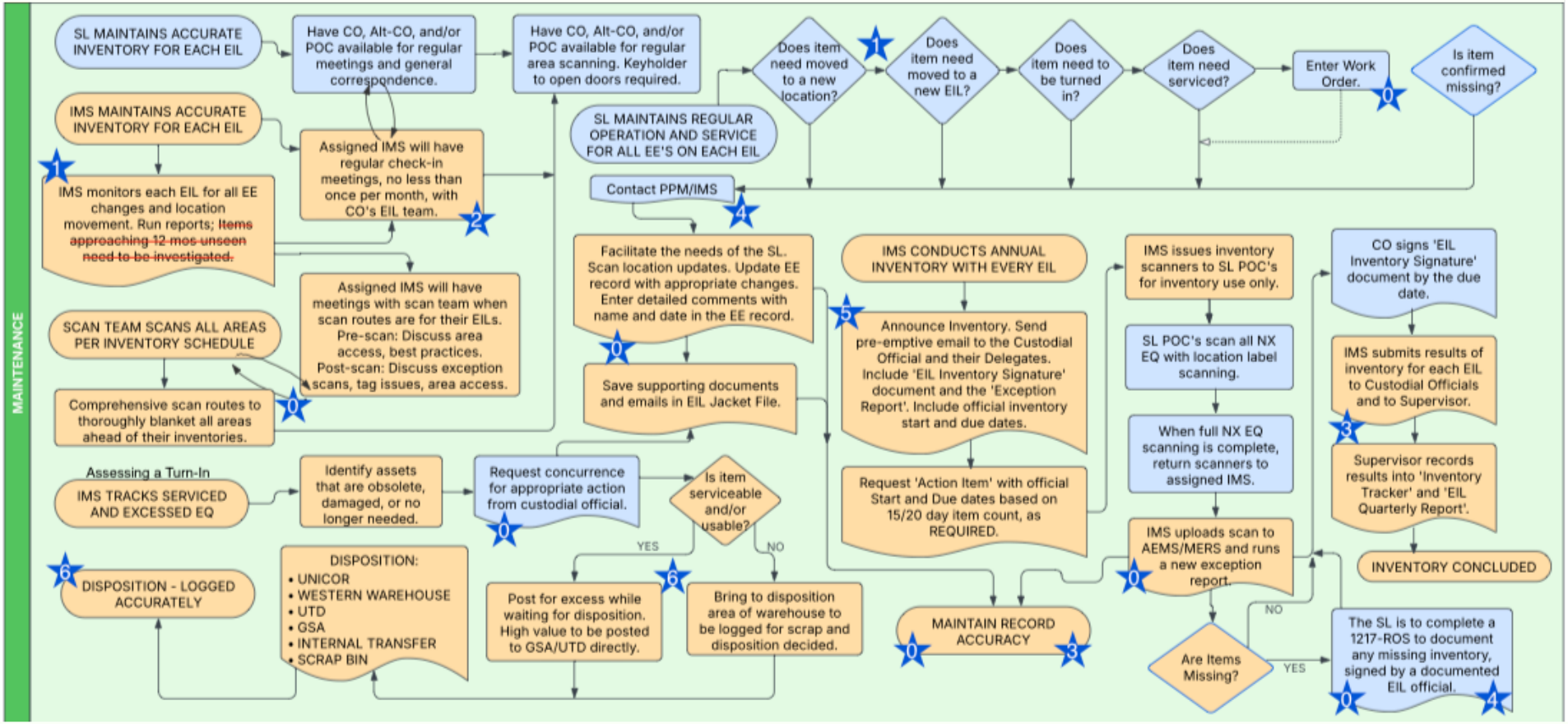
Closing Statement
We control the information → We control the inventory → We satisfy compliance. That is the standard- period - and should be the standard operating model for NX in Pittsburgh.

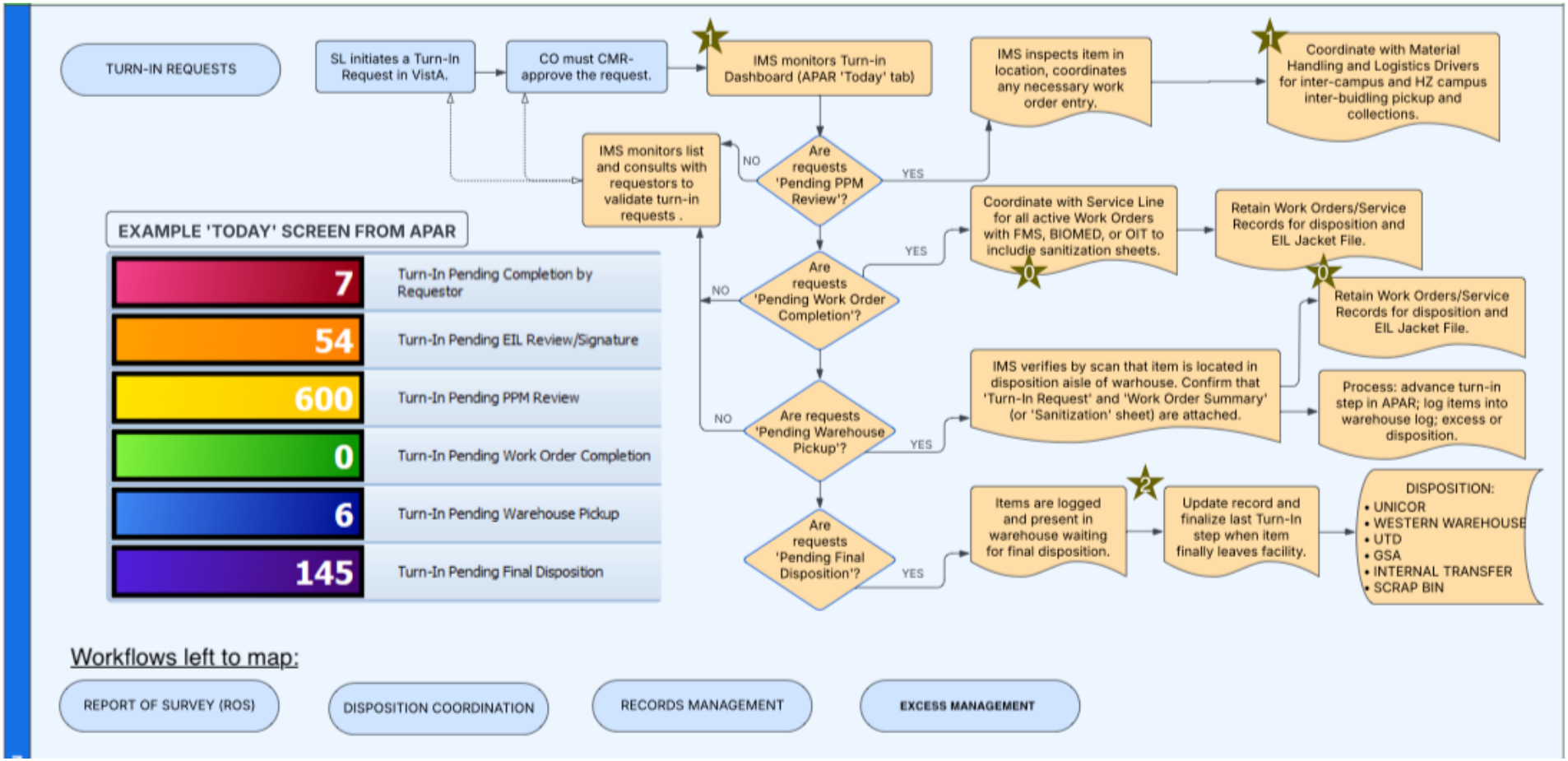
- *We control the information → We control the inventory → We satisfy compliance.*
- *Core principles drive discipline. Discipline drives compliance.*
- *Clear roles create clear accountability. Accountability creates compliance.*
- *PADMD turns scattered processes into a single lifecycle. Every stage enforces compliance.*
- *Governance ensures discipline. Discipline ensures compliance.*
- *Dashboards are proof-of-concept windows. The real control is the enforced data flow.*
- *Every OIG and QCR gap is tied directly to a PADMD practice. This is not theory — it is control by design.*
- *Even when systems fail, accountability does not. Unique IDs and the Uber-Tracker keep control unbroken.*

NX_Compliance_Crosswalk

OIG/QCR Finding	PADMD Stage	Practice / Control	How It Resolves the Gap
Lost/unaccounted assets (~75,500 items)	Acquisition → Deployment → Maintenance	Tagging at receipt (MH/Receiving); IMS updates locations; Annual Inventories	Assets are tagged on arrival, tracked through deployment, and physically verified annually with no exceptions.
Wrong locations (33% mismatch)	Deployment	IMS responsible for updating all location changes; COs must request changes via intake; MH actions logged as data events	No silent moves. Every relocation requires a documented request; IMS updates system records.
Idle/unused assets (~62,500 items)	Planning → Maintenance → Disposition	SEPG-driven planning; Bill-of-Health reviews; Disposition pipeline forces reuse/ transfer/disposal	Planning prevents overbuying; shops certify condition; NX pipeline ensures assets don't sit idle.
Inventory by exception loophole (20+ months between checks)	Maintenance	Annual inventories, no exceptions; <95% triggers 6-month re-check	Every accountable item seen annually. No reliance on maintenance history to bypass inventory.
Incomplete or missing ROS (915 unfinished, $31.2M; 210 missing)	Disposition	ROS workflow with initiation → approval → closure tracked; 60-day closure enforced; dashboards provide IMS status views	Every missing/damaged item generates a ROS; progress is visible until closure, meeting 60-day requirement.
Poor custodial oversight	Planning → Deployment → Maintenance	Custodial Officers must request changes; CO assignments validated during EIL governance reviews	CO responsibility is enforced; IMS implement changes only after CO request; assignments kept current.
Directors deferring oversight	Governance	Quarterly governance reviews; annual leadership compliance reviews	Facility Directors/AOs required to participate in scheduled compliance reviews; no passive deferral.
Unverified re-use/ disposal	Maintenance → Disposition	Bill-of-Health reports required from OIT, Biomed, FMS shops; no asset sent to Excess without certification	Responsibility sits with customer shops; NX receives documentation, doesn't chase it.
Fragmented Pittsburgh processes	Disposition (all)	Unified Turn-in/Disposition Log; ROS tracking; Excess/Unicor/Recycling channels integrated	Creates one robust process where scattered ones existed; documentation standardized across disposition routes.
System outages causing accountability gaps	Contingency	Controlled templates, spreadsheets, Uber-Tracker; reconciliation into PADMD after outage	Continuous accountability even during outages; auditors see no blind spots.


PLANNING
Customer Planning next FY EQ
Enter SEPG
Complete EQ Committee actions
Complete Station Director actions
Is item over cost threshold
YES
NO
Complete VISN EQ Committee actions
Complete VISN Station actions
PPM: IMS meet with SL to identify replacement needs. Pull APAR and SEPG reports.
PPM: IMS monitor approved EQ. This will be incoming.
Facilitate fully-approved SEPG plan before the start of the fiscal year.
1
Create and submit connected EER
ACQUISITION
Receive requirements for approved EER.
Is item listed on National Equipment Catalog (NEC)?
Is item available through the Electronic Catalog (eCAT)?
Is item available through the VA National Acquisition Center (NAC)?
Is item available through the Federal Supply Schedule (FSS)?
NO
YES
Obtain quotes
Contact NX Contract COR
Contact eCAT Builder
Create procurement package for local contracting
Submit all requirements for purchase
PPM: IMS meet with SL regarding warranties, rebates, refunds, repair, and return policies.
2
1 Current process unclear. A list should be maintained and a list-item should be created per each new PO; this connects the SEPG/EER ID with the PO. Relevant documents should be submitted/drop-boxed to PPM for 'jacket file'.
DEPLOYMENT
EQUIPMENT RECEIVED
EQ processed by Material Handling
1
Material Handler requests tags for NX EQ from PPM
2
Is EQ ready for delivery?
NO
Equipment Delivered, with Signature
Signed documents retained by warehouse.
5
Delivery process complete.
PPM: IMS team creates tags as requested. IMS must obtain ALL required information to create EE record through PO and inspection. IMS initiates BIOMED Work Order for medical devices.
3
PPM: IMS team applies tags to assure accuracy and scannable application. IMS performs additional incoming inspection to ensure customer expectations.
Material Handler prepares/stages for delivery.
Store in warehouse. Record location and contents.
Inform PPM of NX EE movement
4
PPM informs MH that EQ is tagged and ready for delivery.
3
IMS monitors delivery status. Follow up on delayed deliveries.
IMS follows up with delivery, scans updated location, verifies EE record accuracy
3
IMS uses interaction with SL as opportunity for Turn-in, ROS, and General Follow-Up.


MAINTENANCE
SL MAINTAINS ACCURATE INVENTORY FOR EACH EIL
Have CO, Alt-CO, and/or POC available for regular meetings and general correspondence.
Have CO, Alt-CO, and/or POC available for regular area scanning. Keyholder to open doors required.
Does item need moved to a new location?
Does item need moved to a new EIL?
Does item need to be turned in?
Does item need serviced?
Enter Work Order.
Is item confirmed missing?
IMS MAINTAINS ACCURATE INVENTORY FOR EACH EIL
Assigned IMS will have regular check-in meetings, no less than once per month, with CO's EIL team.
SL MAINTAINS REGULAR OPERATION AND SERVICE FOR ALL EE'S ON EACH EIL
IMS monitors each EIL for all EE changes and location movement. Run reports; Items approaching 12 mos unseen need to be investigated.
Contact PPM/IMS
Facilitate the needs of the SL. Scan location updates. Update EE record with appropriate changes. Enter detailed comments with name and date in the EE record.
IMS CONDUCTS ANNUAL INVENTORY WITH EVERY EIL
IMS issues inventory scanners to SL POC's for inventory use only.
CO signs 'EIL Inventory Signature' document by the due date.
Assigned IMS will have meetings with scan team when scan routes are for their EILs. Pre-scan: Discuss area access, best practices. Post-scan: Discuss exception scans, tag issues, area access.
SCAN TEAM SCANS ALL AREAS PER INVENTORY SCHEDULE
Save supporting documents and emails in EIL Jacket File.
Announce Inventory. Send pre-emptive email to the Custodial Official and their Delegates. Include 'EIL Inventory Signature' document and the 'Exception Report'. Include official inventory start and due dates.
SL POC's scan all NX EQ with location label scanning.
IMS submits results of inventory for each EIL to Custodial Officials and to Supervisor.
Comprehensive scan routes to thoroughly blanket all areas ahead of their inventories.
When full NX EQ scanning is complete, return scanners to assigned IMS.
Supervisor records results into 'Inventory Tracker' and 'EIL Quarterly Report'.
Assessing a Turn-In
IMS TRACKS SERVICED AND EXCESSED EQ
Identify assets that are obsolete, damaged, or no longer needed.
Request concurrence for appropriate action from custodial official.
Is item serviceable and/or usable?
YES
NO
Request 'Action Item' with official Start and Due dates based on 15/20 day item count, as REQUIRED.
IMS uploads scan to AEMS/MERS and runs a new exception report.
INVENTORY CONCLUDED
DISPOSITION - LOGGED ACCURATELY
DISPOSITION:
• UNICOR
• WESTERN WAREHOUSE
• UTD
• GSA
• INTERNAL TRANSFER
• SCRAP BIN
Post for excess while waiting for disposition. High value to be posted to GSA/UTD directly.
Bring to disposition area of warehouse to be logged for scrap and disposition decided.
MAINTAIN RECORD ACCURACY
Are Items Missing?
NO
YES
The SL is to complete a 1217-ROS to document any missing inventory, signed by a documented EIL official.



Workflows left to map:

REPORT OF SURVEY (ROS)

DISPOSITION COORDINATION

RECORDS MANAGEMENT

EXCESS MANAGEMENT

PADMD_Flowchart_Key_Grid

Stage	ID	Description	Requirement/Compliance
Planning	**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 current SEPG portal can serve as the record.	SEPG accountability, planning transparency, EIL assignment requirement
Acquisition	**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
Acquisition	**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	**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
Deployment	**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
Deployment	**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
Deployment	**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
Deployment	**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	**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
Maintenance	**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
Maintenance	**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
Maintenance	**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
Maintenance	**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
Maintenance	**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
Disposition	**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-0***	Upload or drop any produced/received documents into the appropriate dedicated dropbox. Separate dropboxes ensure metadata is captured automatically.	Document control, metadata capture
Disposition	**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
Disposition	**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

Closing Statement

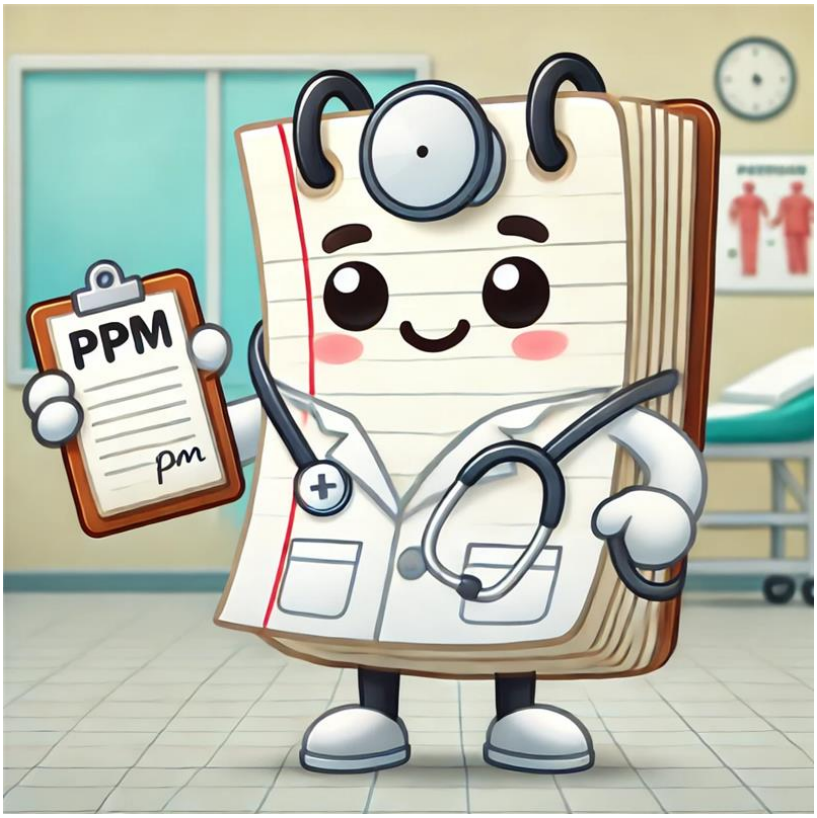
We have documented the current state, defined the future state, developed live tools that validate the model, and we have aligned PADMD with OIG and QCR findings.

We have moved beyond ‘what if’ scenarios to a clear demonstration of ‘what will work’.

Pittsburgh has already shown that by enforcing lifecycle discipline, NX accountability can be run as a program, not as a reaction. SharePoint is simply the tool we have today — the structure will outlast any platform. The core truth is this:

When we control the information, we control the inventory. When we control the inventory, we satisfy compliance.

That is the standard we have to set in Pittsburgh. It is the standard we should set across VISN 4. And it is the standard OIG should see nationally.



PAD M.D.: *Keeping inventories healthy through compliance.*

The question is no longer how this can be done, it’s whether we are prepared to lead.