**White Paper**

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

**From Planning through Disposition (PADMD), Anchored in TG-90 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 as Baseline**

TG-90 remains the foundational training guide for material handling across VA facilities. While dated, its principles—custody at every handoff, safe handling of materials, and documentation discipline—still apply. The proposed system embeds TG-90’s custody principles within the broader PADMD framework.

**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. By the time 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.

**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 **paper custody** and **digital custody**.

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 guarantees that no stage of the lifecycle is undocumented or untracked.

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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 eliminates document chasing, strengthens stewardship, and ensures the integrity of NX property management across the enterprise.

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