Department of Veterans Affairs
Decentralized Hospital Computer Program

EQUIPMENT/TURN-IN REQUEST USER MANUAL

Version 1.0
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Information Resource Management Field Office
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PREFACE

The Equipment Request/Turn-In Request Module Version 1.0 will provide support to a variety of administrative activities in your medical center, such as your non-expendable equipment requests and any equipment turn-ins.

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Revision History

Initiated on 12/29/04

Date	Description (Patch # if applic.)	Project Manager	Technical Writer
12/29/04	Updated to comply with SOP 192• 352 Displaying Sensitive Data.		REDACTED
12/29/04	Pdf file checked for accessibility to readers with disabilities.		REDACTED

CHAPTER 1 INTRODUCTION

1.1 The Role of the Equipment/Turn-In Request Module

You may be wondering how the Equipment/Turn-In Request Module will change your job. You will be pleased to know your job will not change much. The main difference is that you will be entering data in IFCAP to establish equipment requests or create a turn-in. Since you already use IFCAP, you are already halfway toward becoming a user of this module.

1.2 How to Use This Manual

This guide shows you what you need to know about using the Equipment/Turn-In Request Module. Each procedure contained in the module is explained in full detail. Remember, you can always enter a question mark (?) to ask for help if you forget what to type or you feel unsure of what is required. Your Application Coordinator is also available to answer your questions.

1.3 Reference Numbering System

This guide is divided into explanations of each step that must be successfully completed before the items can be ordered through the normal IFCAP purchasing procedure. By the time you finish this guide, you will know how an equipment request is processed before purchase and how to turn in equipment items.

Using a computer to help you do your job can be very exciting and challenging. Just like learning anything brand new, it can be frustrating in the beginning. Be patient with yourself. Soon you will be an "expert" in doing an Equipment Request or creating a Turn-In.

1.4 Package Management, Legal Requirements and Security Measures

Functionally, the Equipment/Turn-In Request module has several organizational elements that use different components of the software. Non-expendable equipment must go through several approval steps before it can be ordered.

- Requestor
- Consolidated Memorandum of Receipt (CMR) Official
- Personal Property Manager (PPM)
- Equipment Committee
- Engineering
- Other Concurring Officials

Turning in non-expendable equipment also requires several approval steps.

- Requestor

- Consolidated Memorandum of Receipt (CMR) Official
- Personal Property Manager (PPM)
- Engineering
- Warehouse

1.5 Package Operation

All Equipment Requests and Turn-Ins must be completed on the computer. The information the computer requires should be familiar to you.   If not, a question mark in response to a prompt from the computer provides you with information which should help you respond.

The questions you see when processing non-expendable equipment requests are different from the questions you see when processing expendable requests. These differences stem from the different requirements. Instead of control points, your non-expendable equipment requests and turn-ins will be tracked by department or Consolidated Memoranda of Receipts (CMR) number. These requests will be sent to the appropriate CMR Responsible Official for approval. Once approved, the requests are released to the A&MM activity for processing.

CHAPTER 2 REQUESTOR

2.1 Introduction
You may be wondering how the Equipment/Turn-In Request module will change your job. You will be pleased to know that with the Equipment/Turn-In Request module, your job will not change much. The main difference is that you will be entering data via an on-line Equipment Request or Turn-In Request.

2.2 Step 1
Select the 'Equipment Request Menu (Requestor)' that has been set up on your main menu. Select 'Enter New Equipment Request' to begin the process.   If your site parameters are set up for a multi-divisional site, you will be asked to identify the Station Number. If you are not at a multi-divisional site, the prompt will default to your Station Number.

```
Select STATION NUMBER ('^' TO EXIT):621//  <RET>    MOUNTAIN HOME
```

2.3 Step 2
You will then be asked to select the CMR Name. Enter a question mark (?) to see the possible CMR numbers/names you can select from. The CMR Responsible Official is the individual designated as the responsible official for a particular CMR.

```
Select CMR NAME:   420 <RET>    SUPPLY (OFFICE)   ACQUISITION & MATERIEL MGMT    ETRUSER,ONE
This Request has been assigned Transaction #:  621-420-96-00024
```

Your non-expendable equipment request has now been assigned a temporary transaction number. This will be the identification number for this request during the life-cycle of this process. Upon approval of the request by the Equipment Committee, a 2237 will be established and assigned a permanent transaction number by the A&MM activity.

2.4 Step 3
The next important prompt will be the Request Type. The request type will determine the next sequence of questions/steps. Additional means that this request is a normal request for new equipment. Initial means that this request is associated with a construction project. Replacement means that you will be asked to identify what existing equipment this new piece of equipment will replace. A corresponding Turn-In request will be generated along with a Replacement request.

2.4.1 Additional Equipment Requests

2.4.1.1 Step 1
Begin the request by identifying the request type as Additional.

```
REQUEST TYPE:  ? <RET>
    CHOOSE FROM:
        A   ADDITIONAL
        R   REPLACEMENT
        I   INITIAL
REQUEST TYPE:  A <RET>      ADDITIONAL
```

2.4.1.2 Step 2
The Date Required By field is required. A particular Sort or Classification can also be assigned to the request at this time. Any data entered here will be moved over to the 2237 when the request passes through all stages and is approved and funded.

```
DATE REQUIRED BY: ? <RET>
    Examples of Valid Dates:
        Jan 20 1957 or 20 JAN 57 or 1/20/57 or 012057
        T   (for TODAY), T+1 (for TOMORROW), T+2, T+7, etc.
    If the year is omitted, the computer uses the CURRENT YEAR.
    You may omit the precise day, as: JAN, 1957
    Enter the date this requested equipment is needed by.
DATE REQUIRED BY:  3.31.95 <RET>   (MAR 31, 1995)
SORT: <RET>
CLASSIFICATION: <RET>
```

2.4.1.3 Step 3
There must be at least one line item entered per request. A word-processing Description of the item will then be required. Other fields associated with each line item are: the Potential Vendor, the Vendor Product number, the Unit Cost, the Quantity Required, and the Contract # field. When entering a possible vendor at the Potential Vendor field, the Vendor file (#440) will be checked for any matching vendors. Matching vendors will be filed in the Potential Vendor Ptr field and will show up there in the Display/Print or viewing of the request. If no matching vendor is found in the Vendor file (#440), then the free text vendor which was just entered will be filed in the Potential Vendor field and will show up for that field in the Display/Print or viewing of the request. In the next two screens, Cannon is an example of free text and ABC is an example of a vendor found in the Vendor file (#440). The last important field identifying a line item is the Parent System/ Component field. Components may be listed as individual parts that make up the parent system. The Parent item is the primary item tracked by AEMS/MERS, for which a CMR will have ultimate responsibility.

```
Select LINE ITEM: 1 <RET>
    DESCRIPTION:
    1> copy machine <RET>
    2> <RET>
    EDIT OPTION: <RET>
POTENTIAL VENDOR:    ETRVENDOR,ONE <RET>
VENDOR PRODUCT #: np6 NP6650 <RET>
UNIT COST:  6790.00 <RET>
QUANTITY REQUIRED: 1// <RET>
CONTRACT #:  GS-26F-1016B <RET>
PARENT SYSTEM/COMPONENT:  P <RET>     PARENT SYSTEM
```

2.4.1.4 Step 4

You will be prompted for another line item. You may enter as many line items as
needed or press return to continue with the remaining questions.

```
Select LINE ITEM:  2 <RET>
    DESCRIPTION:
        1>TYPEWRITER STAND <RET>
        2> <RET>
    EDIT Option: <RET>
POTENTIAL VENDOR: ETRVENDOR , TWO <RET>
        1ETRVENDOR,TWO     NO. 123
    ORDERING ADDRESS: 123 BAKER ST.
                       RICHMOND, VA 23112
        2ETRVENDOR,TWO     NO. 336
    ORDERING ADDRESS: 12 PENN STATION
                       NEW YORK, NY 10012
CHOOSE 1-2: 2 <RET>     336
VENDOR PRODUCT #:  S-1 <RET>
UNIT COST:  100.00 <RET>
QUANTITY REQUIRED: 1// <RET>
CONTRACT #: <RET>
PARENT SYSTEM/COMPONENT:  C <RET> COMPONENT
```

2.4.1.5 Step 5

A justification of why the item or items are being requested is mandatory.

```
JUSTIFICATION: ? <RET>
    1> <RET> ?? Justification for this request is required
JUSTIFICATION:
    1> TO ASSIST CONTRACT SECTION <RET>
    2> <RET>
EDIT Option: <RET>
```

2.4.1.6 Step 6

Change in Personnel would be answered with a 'Yes' if additional personnel are
needed to operate this equipment. If answered 'Yes', an explanation is required and
should include information as to type of change in personnel, number of personnel
and job level.

```
CHANGE IN PERSONNEL: NO// ? <RET>
     Enter 'Y' if there will be any changes in number and/or grades of
```

```
      personnel.
      Choose from:
         Y   YES
         N   NO
CHANGE IN PERSONNEL: NO// Y <RET>    YES
CHANGE IN PERSONNEL EXPLAIN:
   1> <RET> ?? Explanation of change in personnel is required
CHANGE IN PERSONNEL EXPLAIN:
   1> WILL BE ABLE TO REDUCE ONE FTEE <RET>
   2> <RET>
EDIT Option: <RET>
```

2.4.1.7 Step 7

If there is a JCAHO or other safety deficiency, the requestor must explain what it
is.

```
JCAHO, CAP, SAFETY DEFICIENCY: NO// ? <RET>
      Enter 'Y' if there are any JCAHO, CAP, or other safety deficiency for
      ordering this equipment.
         Choose from:
             Y        YES
             N        NO
JCAHO, CAP, SAFETY DEFICIENCY: NO// Y <RET>     YES
DEFICIENCY EXPLANATION:
   1> <RET> ?? Explanation of the scope of deficiencies is required
DEFICIENCY EXPLANATION:
   1>Must be well ventilated.   <RET>
   2><RET>
EDIT Option: <RET>
```

2.4.1.8 Step 8

If there is an **increase** in recurring costs you will be asked if there are sufficient
funds budgeted for this increase and to explain the cause of the increase. Also, you
must enter the approximate cost for supplies which may occur if this equipment is
purchased. If there is a **decrease** in recurring costs, explain why there is a
decrease and enter the approximate amount of the decrease. Entering **no change**
will go on to the next step without asking for any further information.

```
CHANGE IN RECURRING COSTS: ? <RET>
     Enter the estimated change in recurring costs if this equipment is
     ordered.
     Choose from:
         I     INCREASE
         D     DECREASE
         N     NO CHANGE
CHANGE IN RECURRING COSTS: I  <RET>    INCREASE
SUFFICIENT FUNDS BUDGETED?: YES// ? <RET>
     Enter 'Y' if sufficient funds have been budgeted to purchase this
     equipment.
     Choose from:
         Y     YES
         N     NO
SUFFICIENT FUNDS BUDGETED?: YES// <RET>
CHANGE RECUR COST EXPLAIN:
   1> <RET> ?? Explanation of scope of recurring costs is required
CHANGE RECUR COST EXPLAIN:
   1>MORE PAPER NEEDED  <RET>
   2><RET>
EDIT Option:<RET>
ANNUAL RECURRING SUPPLY COST: ? <RET>
     Enter the estimated annual cost of recurring supplies for this equipment.
ANNUAL RECURRING SUPPLY COST: 120.00 <RET>
```

2.4.1.9 Step 9

The next group of responses is dependent on whether extra training is needed in order to operate the requested equipment. If training is needed, then you must explain the type of training needed and provide an estimated training cost.

```
TRAINING NEEDED?: NO// ? <RET>
   Enter 'Yes' if any special training will be needed to operate this
   new piece of equipment if purchased.
TRAINING NEEDED?:  NO//   <RET>
```

2.4.1.10 Step 10
Answer 'Yes' if a maintenance contract recommended for the equipment being requested. If a maintenance contract is recommended, an explanation of why and an estimated cost of the contract are required.

```
MAINT.  CONTRACT RECOMMENDED:  ?  <RET>
    Enter 'Yes' if a maintenance contract comes with the item or is recommended for the item.
    Choose From:
    Y      YES
    N      NO
MAINT. CONTRACT RECOMMENDED:  Y <RET>   (YES)
MAINT. CONTRACT JUSTIFICATION:
    1) <RET> ?? Explanation of why maintenance contract is recommended, is required
MAINT. CONTRACT JUSTIFICATION:
    1)  TO KEEP MACHINE IN RUNNING ORDER <RET>
    2)<RET>
EDIT Option:<RET>
MAINT. CONTRACT COST:  ? <RET>
    Enter the estimated cost for a recommeded maintenance contract
MAINT. CONTRACT COST:  250.00 <RET>
```

2.4.1.11 Step 11
Please indicate if space is available for this equipment and where it will be located. The location may be available from the Space file. If the location is not available from the Space file, then a free text location is acceptable.

```
SPACE AVAILABLE?: YES// <RET>
LOCATION:  ?  <RET>
    Enter 'Yes' if space is currently available for this equipment
    Choose From:
    Y      YES
    N      NO
SPACE AVAILABLE?:  YES//<RET>    YES
LOCATION:  ??  <RET>
    Enter the location where this item would be located if space is available.

Locations currently in the space file:
    8-310
    8-312
    8-313
    KITCHEN1
    SURGERY ROOM
LOCATION:   8-313  <RET>
```

2.4.1.12 Step 12
Please indicate if utilities are required for installation of this equipment. This will help the Engineering department in their evaluation of the request.

```
INSTALLATION NEEDED?: ? <RET>
    Enter 'Yes' if the Engineering Department must install equipment
    Choose from:
        Y    YES
        N    NO
INSTALLATION NEEDED?: N  <RET>     NO
Select UTILITIES REQUIRED:  ? <RET>
    Answer with UTILITIES REQUIRED
        You may enter an new UTILITIES REQUIRED, if you wish
        Select as many utilities that are needed for installation.
Choose from:
        0              None
        1              Air
        2              Gas
        3              Vacuum
        4              ADP
        5              Plumbing
        6              Electricity-110V
        7              Electricity>208V
        8              Emergency Power
        9              Fire Sprinkler
        10             Exhaust
        11             A/C
        12             Steam
        13             Other
Select UTILITIES REQUIRED:  6 <RET>       (Electricity-110V)
Select UTILITIES REQUIRED:  13 <RET>      (Other)
Select UTILITIES REQUIRED:  <RET>
OTHER UTILITIES: ? <RET>
    Enter a free text other utility up to 50 characters.
OTHER UTILITIES:  15 AMP BREAKER NEEDED  <RET>
```

2.4.1.13 Step 13
Please indicate if there is a point of contact for this request other than yourself.
You may select the person from the New Person file (200).

```
SERVICE CONTACT:  ? <RET>
    Enter the name of a service contact if other than the requestor.
Answer with NEW PERSON NAME, INITIAL, SSN, or NICK NAME
Do you want the entire 36-Entry NEW PERSON LIST?
SERVICE CONTACT: <RET>
SERVICE CONTRACT PHONE:  <RET>
```

2.4.1.14 Step 14
Send the request to the CMR Responsible Official responsible to review this
request.

```
Is this request ready for CMR approval?: Y <RET>    YES
```

After responding 'Yes', the CMR Responsible Official will see a message that a
request is available for his/her review and approval when signing onto their
Equipment Request Menu.

2.4.2 Initial Equipment Requests

2.4.2.1 Step 1
Initial equipment requests are requests that may go with a particular planned project. These should be items that are required when a project is completed, such as a new patient wing.

```
REQUEST TYPE:  ? <RET>
    CHOOSE FROM:
        A   ADDITIONAL
        R   REPLACEMENT
        I   INITIAL

REQUEST TYPE:  I <RET>    INITIAL
```

2.4.2.2 Step 2
For an initial equipment request, project number and project manager entries are required. When selecting a project, the Chief Engineer will default for the project manager.

```
PROJECT NUMBER:  <RET> ?? Project Number is required for Initial Requests
PROJECT NUMBER:  ? <RET>

    ENTER THE OFFICIALLY ASSIGNED PROJECT NUMBER (must begin with 3 numerics and use
    dashes as delimiters)

Must begin with station number. Enter '??' for more help text.

Project currently in the Project File:
    PROJECT NUMBER:
    621-00-101            New Kitchen
    621-00-102            New Patient Room
    621-301              Audiovisual Center
PROJECT NUMBER:  621-301 <RET>
PROJECT MANAGER: <RET> ?? Project Manager is required when a Project number is entered!
PROJECT MANAGER: ETRUSER, TWO <RET>
```

2.4.2.3 Step 3
Follow 2.4.1.2 Step 2 through 2.4.1.13 Step 14 to complete an initial request.

2.4.3 Replacement Equipment Requests

2.4.3.1 Step 1
If equipment needs to be replaced, a simultaneous turn-in request will be generated with the new requested equipment by selecting a replacement request type.

```
REQUEST TYPE:  ? <RET>
    Select appropriate type for this request. Additional for new equi pment, Initial for project
    equipment, and Replacement for equipment to be replaced.
    Choose From:
        A   ADDITIONAL
        R   REPLACEMENT
        I   INITIAL
REQUEST TYPE:  R <RET>     REPLACEMENT
The corresponding Turn-In Transaction # is:  621-420-96-00026
```

2.4.3.2 Step 2
As with initial type requests, replacement requests prompt you to enter a project number and project manager. Unlike an initial request, however, these are not required entries, and you may pass them by pressing return.

```
PROJECT NUMBER:  ? <RET>
    ENTER THE OFFICIALLY ASSIGNED PROJECT NUMBER (must begin with 3 numerics and use
    dashes as delimiters).

Must begin with station number. Enter '??' for more help text.

Projects currently in the Project File:
PROJECT NUMBER: <RET>
PROJECT MANAGER:  ? <RET>
    Please enter the Project Manager
Answer with NEW PERSON NAME, INITIAL, SSN, or NICK NAME
Do you want the entire 36-Entry NEW PERSON LIST? N <RET>
PROJECT MANAGER: <RET>
```

2.4.3.3 Step 3
Follow 2.4.1.3 Step 3 to enter line items.

2.4.3.4 Step 4
In a replacement equipment request, part of entering line items includes entering the item which is being replaced. For every quantity entered, if an item has been designated as a Parent, you are required to enter a replacement item from the AEMS/MERs file. It is not mandatory to enter a replacement item if a requested item is a Component. The items from which you may select from will be limited to those items which fall under the CMR to which you are directing this request. For example, if you are requesting 3 replacement trucks, you must identify the three trucks which will be replaced and turned in.

```
Select the Replacement Item to correspond with Line Item #1 Quantity:   1 <RET>
Select REPLACEMENT ITEM:   ? <RET>
    Answer with EQUIPMENT INV. ENTRY NUMBER, MANUFACTURER, MFGR. EQUIPMENT NAME,
    MODEL, SERIAL #, CATEGORY STOCK NUMBER, or LOCATION
Do you want the entire EQUIPMENT INV. List?   N <RET>      (NO)
Select REPLACEMENT ITEM:   36115-5020 11644 <RET>     PERSONAL SHREDDER   IN USE 3615-5020
CSN:  1005-000667
Description: PERSONAL SHREDDER
Model #:                         Serial #: 6082200144L
Manufacturer: ETRVENDOR, THREE      Last Location: 1548
Acquisition Value:  $415.70       CMR: 420 SUPPLY (OFFICE)
Are you sure that PERSONAL SHREDDER is the correct item being replaced by requested item,
SHREDDING MACHINE?   Y <RET>     (YES)
```

2.4.3.5 Step 5
After selecting the correct replacement item, indicate why this item needs to be replaced. If the reason is not listed, enter other and enter a reason up to 70 characters.

```
Replacement Justification:   ? <RET>
    Choose From:
    1   Fair wear and tear
    2   Excess equipment failure/repair
    3   Upgrade
    4   State-of-art technology
    5   Replacement due to loss or damage
    6   Other
Replacement Justification:   4 <RET>      State-of-art technology
Select LINE ITEM NUMBER: <RET>
```

2.4.3.6 Step 6
Follow 2.4.1.5 Step 5 through 2.4.1.14 Step 14 to complete a replacement equipment request. **Reminder:** There are now two requests on file, one replacement request and one turn-in request for the item being replaced.

2.5 Edit Equipment Request
If you exit the system before completing a new equipment request, or a request is returned by other reviewers, you may edit the request. You will not be allowed to edit the request type. If the request type is not accurate, you must cancel and re-enter the request.

2.5.1 Step 1

Answering 'No' to the question, 'Do you want to edit this request?' returns you to the menu.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 621-666-95-00001 <RET>

Do you want to view the information related to this request?  Yes// N  <RET>    NO
Do you want to edit this request? NO//<RET>
```

2.5.2 Step 2

Data editing begins with DATE REQUIRED BY for additional type requests and PROJECT NUMBER for replacement and initial requests. The prompts are the same as entering a new equipment request and defaults to information already entered. You will be prompted if this request is ready to go to the CMR Official. If you do not answer 'Y'es then you may edit the request further. Once it has gone to the CMR Responsible Official, no further editing is allowed unless it is returned to you as a result of non-approval by other responsible officials during the review process. Other options available are cancel or split the request. These options will be discussed in 2.6 Cancel Equipment Request and 2.10 Split Equipment Request.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:

Do you want to view the information related to this request? Yes// <RET>
Do you want to edit this request? NO// <RET> Y Yes
DATE REQUIRED BY: JAN 1, 1995// <RET>
SORT: <RET>
CLASSIFICATION: <RET>
Select LINE ITEM: 1 <RET>
DESCRIPTION:
    1>Surgery tables <RET>
    2> <RET>
EDIT Option: <RET>
POTENTIAL VENDOR: <RET>
VENDOR PRODUCT #: <RET>
UNIT COST: 50.00// 75.00 <RET>
QUANTITY REQUIRED: 5// <RET>
CONTRACT #: <RET>
PARENT SYSTEM / COMPONENT: COMPONENT// <RET>
Select LINE ITEM: <RET>
```

2.5.3 Step 3

Follow 2.4.1.2 through 2.4.1.14 to complete request.

2.6 Cancel Equipment Request

You may need to cancel an equipment request that has not been approved by the CMR Responsible Official, the Personal Property Manager. It must be returned to your control before you may cancel it. You may also, at any time, cancel a request that has not been completed or forwarded to the CMR Responsible Official.

2.6.1 Step 1

Select the transaction you wish to cancel.

```
Enter TRANSACTION #:   ? <RET>
     ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
     1        621-666-95-00001   Pending Completion by Requestor
     3        621-666-95-00003   Pending Completion by Requestor
     7        621-666-95-00007   Returned by CMR Official - Not Approved
     8        621-666-95-00008   Returned by CMR Official - Not Approved
     10       621-666-95-00009   Returned by PPM - Item Not NX
Enter TRANSACTION #: 3 <RET>  621-666-95-00003   Pending Completion by Requestor
```

2.6.2 Step 2

Information concerning this request will display for your review.

```
Service:  ETRVENDOR , SEVEN     CMR Official:ETRUSER , THREE
Requestor:  ETRUSER , FOUR                  Date Entered:  DEC 07,1993
Line Items:
     1   AIR CONDITIONER        $900.00

Are you sure you want to cancel this transaction?  NO//   ? <RET>
Please enter 'Y' to cancel this transaction.

Are you sure you want to cancel this transaction? NO/ Y <RET>    (YES)
```

2.6.3 Step 3

Enter a reason why the request is being cancelled.

```
REASON CANCELLED:
     1>MISTAKEN ENTRY <RET>
     2> <RET>
EDIT Option: <RET>

Transaction #3 has been cancelled.
```

2.6.4 Step 4

If the request is a replacement equipment request and has an associated turn-in document, you will be asked to cancel the turn-in document.

```
Transaction #621-666-95-00012 has been cancelled.

Do you want to cancel the corresponding Turn-In Request? NO// Y <RET>    (YES)
Turn-In Request #20 cancelled.
```

2.7 Request Status Report

If you would like to see the status of the equipment requests that you have entered, run the Request Status Report.

```
Equipment Request Status Report by requestor ETRUSER,FOUR
                                                      Date       Status
Transaction #      Description        Status          Entered    Date
--------------------------------------------------------------------------
621-123-96-00009  BATHTUB/SINK        Pending CMR Official 06/13/96   06/13/96
621-136-96-00013  ENGINEERING PROJECT Pending Engineering 03/18/96   03/18/96
621-136-96-00014  HYDRAULIC LIFT MACHI Pending Engineering 03/18/96   05/06/96
621-136-96-00015  WATERHEATER, 100 CUB Pending CMR Official 03/18/96   03/18/96
```

2.8 Display/Print Equipment Request
Use this menu option to print out a hardcopy of a request.

```
Select Equipment Request Menu (Requestor) Option: DIS <RET> play/Print Equipment Requests
(Requestor)
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>

Choose From:
    621-780-95-00001   Cancelled Request
    621-780-95-00001A  Cancelled Request
    621-780-95-00001B  Pending Completion by Requestor
    621-780-95-00002   Cancelled Request
    621-780-95-00004   Pending Equipment Committee Approval
    621-780-95-00005   Approved - Funded
    621-780-95-00009   Cancelled Request
    621-780-95-00012   Cancelled Request
    621-780-95-00014   Pending Completion by Requestor
    621-780-95-00017   Pending CMR Official Review
    621-780-95-00019   Pending Completion by Requestor
    621-780-95-00010   Disapproved - Do Not Resubmit

Enter TRANSACTION #:   621-782-96-00002B <RET>           Disapproved - Do Not Resubmit

Do you want to view the information related to this request? NO/ Y <RET> Yes
DEVICE: <RET>                   MARGIN: <RET>
```

2.9 Resubmit Requests
Use this option to resubmit certain requests. The request will go back to pending
Equipment Committee review and approval without having to go through all the
steps again.

2.9.1 Step 1
Review the transactions that are eligible for resubmission.

```
Select Equipment Request Menu (Requestor) Option:   RE <RET> submit Equipment Requests
Select EQUIPMENT REQUEST TRANSACTION NUMBER:   ?? <RET>

CHOOSE FROM
        621-420-96-00024        Pending PPM Review
        621-420-96-00024        Pending PPM Review
        621-420-96-00027        Returned by CMR Official-Not Approved

Select EQUIPMENT REQUEST TRANSACTION NUMBER:
```

2.9.2 Step 2
Resubmitted requests are assigned the status which reflects the approval steps they have already been through.

```
Do you want to view the information related to this request? No// <RET>
Is this request ready to go? Yes// ? <RET>

Enter 'Yes' if this request is ready to be resubmitted. Request will become
'Pending Equipment Committee Review/Rank' if status was 'Deferred - Resubmit'.
Or status will become 'Ready for 2237 Processing' if status was 'Approved - Pending
Funding'. Or status will become 'Pending CMR Official Review' if status was 'Returned
by CMR Offical-Not Approved'.

Is this request ready to go? Yes// <RET>
```

2.10 Split Equipment Request
This option allows for splitting a request if returned to the requestor.   Any new transaction number will be the same as the old number, but have a new suffix added to it, e.g. A, B, C.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>
CHHOSE FROM:
    1       621-666-95-00001       Pending Completion by Requestor
    2       621-666-95-00002       Returned by PPM - Item Not NX
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  621-666-95-00002 <RET> Returned by PPM - Item Not
NX
    LINE ITEM NUMBER: 1
    DESCRIPTION:
       XRAY FILM
    POTENTIAL VENDOR:                        VENDOR PRODUCT #:
    UNIT COST:  100.00                       QUANTITY REQUIRED: 5
    TOTAL COST:  500.00
Transfer this line item to the new request? YES// <RET> (YES)
    LINE ITEM NUMBER: 2
    DESCRIPTION:
       IBM SELECTRIC III
    POTENTIAL VENDOR:                        VENDOR PRODUCT #:
    UNIT COST:  700.00                       QUANTITY REQUIRED:  1
    TOTAL COST:  700.00
Transfer this line item to the new request? YES// N <RET> (NO)
    LINE ITEM NUMBER: 3
    DESCRIPTION:
    ADDRESSOGRAPH LABEL MACHINE
    POTENTIAL VENDOR:                        VENDOR PRODUCT #:
    UNIT COST:  500.00                       QUANTITY REQUIRED:  1
    TOTAL COST:   500.00
Transfer this line item to the new request? YES// N <RET> (NO)
Splitting this request. Please wait...
New Transaction Number is:  621-666-95-00001A
```

2.11 Process Equipment Turn-Ins Menu

If you wish to turn-in equipment without ordering replacement equipment, select
the Process Equipment Turn-Ins menu option so that the request may go through
the proper channels.

2.11.1 Enter Excess Equipment Turn-In Request

2.11.1.1 Step 1

Select the Enter Excess Equipment Turn-In Request option from the Process Turn-
Ins menu. The first two entries you make establish the temporary request number
for this turn-in document. If your site parameters are set up for a multi-divisional
site, you will be asked to identify the Station Number, otherwise it will default to
your station number.

```
Select STATION NUMBER ('^' TO EXIT):621// <RET>    MOUNTAIN HOME
```

2.11.1.2 Step 2
Select the CMR Responsible Official responsible for the equipment being turned in.

```
Select CMR NAME:  420  <RET>  SUPPLY (OFFICE)   ACQUISITION & MATERIAL MGMT    ETRUSER,ONE

This Request has been assigned Transaction #:  621-420-96-00028
```

Your equipment turn-in document has now been assigned a temporary transaction number. Refer to this number during the life cycle of the request.

2.11.1.3 Step 3
You will be asked next to select the items from the Equipment Inventory (AEMS/MERS) file that you wish to turn in. After you have selected and filled in the justification for turning in this equipment, it will go to the responsible CMR Responsible Official for review and approval.

```
Select REPLACEMENT ITEM NUMBER: 76096 11077 <RET>   BINDING SYSTEM   IN USE   3610-5052
    TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
    TURN-IN LINE ITEM DESCRIPTION: BINDING SYSTEM// <RET>
CSN:   1005-000667
Description: BINDING SYSTEM
Model #:  750                           Serial #:  76096
Manufacturer: ETRVENDOR, FOUR                  Last Location:
Acquisition Value:  $3296.00            CMR: 420 SUPPLY (OFFFICE)
JUSTIFICATION:  ?
    CHOOSE FROM:
        1       Fair wear and tear
        2       Excess equipment failure/repair
        3       Upgrade
        4       State-of-art technology
        5       Replacement due to loss or damage
        6       Other
JUSTIFICATION:  2 <RET>   Excess equipment failure/repair
Select TURN-IN LINE ITEM: <RET>

Is this request ready for CMR Approval?  Y <RET> YES
```

2.11.2 Edit Excess Equipment Turn-In Document
If a turn-in document has been left incomplete, then the ability exists for you, the requestor, to make changes and even add additional items.

```
Select TURN-IN REQUEST TRANSACTION CODE:  621-420-96-00028 <RET>  Pending CMR Official Review
DEVICE: HOME// <RET>  LAN

TRANSACTION CODE: 621-420-96-00028              REQUESTOR: ETRUSER , FOUR
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: MAR 06, 1996@09:57:56        STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL:  ETRUSER , THREE
STATUS DATE: MAR 06, 1996                       CMR OFFICIAL APPROVAL:
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS: 1
    EQ. REQUEST LINE NUMBER: 345
    MFGR. EQUIPMENT NAME: BINDING SYSTEM
    MANUFACTURER: ETRVENDOR , FOUR
    MODEL: 750                                  Serial #: 76096
    NXRN #: 18329                               CATEGORY STOCK NUMBER: 3610-438983
    ACQUISITION VALUE: 3296.00                  ACQUISITION DATE: MAR 09, 1992
    CMR: 420 SUPPLY (OFFICE)                     REPLACEMENT DATE: MAR 09, 2007
    LOCATION:
    WAREHOUSE OFFICIAL:
```

2.11.3 Cancel Excess Equipment Turn-In Request
The ability to cancel an incomplete or returned turn-in document also exists.

```
Enter TRANSACTION #:  ? <RET>
    ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
     1                621-666-95-00006   Pending Completion by Requestor

Enter TRANSACTION #:  1 <RET>    621-666-95-00006   Pending Completion by Requestor

Service:  IRM                     CMR Official:  ETRUSER , THREE
Requester:  ETRUSER , FOUR              Date Entered: DEC 07, 1993
Line Items:
    Number:  1                    Description: CONT BARIUM FLOW XRAY
    Number:  2                    Description: COMPUTER DIGITAL

Are you sure you want to cancel this turn-in? NO// Y <RET> (YES)
```

CHAPTER 3 CMR RESPONSIBLE OFFICIAL

Below you will see a brief description of the options and sub-menus found on the Equipment Request menu if you are the assigned CMR Responsible Official. A quick review of these descriptions should help you understand when to use an option. The rest of this manual goes into detail explaining <u>how</u> to use each option.

```
ACCESS CODE: CODE <RET>
VERIFY CODE: CODE <RET>
Good afternoon FRANCIS You last signed on today at 13:46
Select TERMINAL TYPE NAME: C-VT220// <RET>
    Digital Equipment Corporation VT-220 terminal

There are 2 equipment requests Pending CMR Official Review

There is 1 turn-in request Pending CMR Official Review.


    Enter New Equipment Request
    Edit Equipment Request
    Cancel Equipment Request
    Request Status Report
    Display/Print Equipment Requests (CMR)
    Approve Equipment Requests (CMR Official)
    Resubmit Request (CMR)
    Process Equipment Turn-Ins Menu ...

Select CMR Official Equipment Request Menu Option:
```

3.1 Enter New Equipment Request
A CMR Responsible Official can enter requests for equipment.

3.2 Edit Equipment Request
A CMR Responsible Official can also edit equipment requests if necessary. Please review Chapter 2 on how to edit Equipment Requests

3.3 Cancel Equipment Request
A CMR Responsible Official can also cancel equipment requests that he/she has entered. Please review Chapter 2 on how to cancel Equipment Requests.

3.4 Request Status Report

If you would like to see the status of equipment requests that you, the CMR Responsible Official, have approved, run the Request Status Report. It will print all the requests that were submitted to you.

```
Equipment Request Status Report by CMR Official ETRUSER,ONE

                                          Date          Status
Transaction #           Status            Entered       Date
-----------------------------------------------------------------------------
621-780-96-00004   Pending Equipment Committee Approval 02/09/96    08/03/96
621-780-96-00014   Pending Completion by Requestor      04/11/96    06/30/96
621-780-96-00017   Pending CMR Official Review          06/30/96    06/30/96
621-780-96-00019   Pending Completion by Requestor      06/30/96    06/30/96
621-781-96-00011   Ready for 2237 Processing            05/18/96    07/27/96
621-781-96-00001   Pending Equipment Committee Approval 06/21/96    08/03/96
621-781-96-00002   Ready for 2237 Processing            06/22/96    07/27/96
621-781-96-00004   Pending Equipment Committee Approval 07/31/96    08/03/96
621-781-96-00005   Pending Equipment Committee Approval 07/31/96    08/02/96
621-781-96-00008   Pending PPM Review                   08/04/96    08/04/96
621-782-96-00002   Pending Equipment Committee Approval 07/28/96    08/02/96
```

3.5 Display/Print Equipment Request

Use this menu option to print out a hardcopy of a request.

```
Select CMR Official Menu Option: DIS <RET> play/Print Equipment Request (CMR)
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>
Choose from:
49  621-420-96-00027        Pending CMR Official Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 49 <RET>   621-420-96-00027   Pending CMR Official
Review
Do you want to view the information related to this request: N// Y <RET> (YES)
DEVICE: HOME// <RET>   LAN
```

3.6 Approve Equipment Requests (CMR Responsible Official)

The CMR Responsible Official must review and approve equipment requests. Ultimately the CMR Responsible Official is responsible for the inventory of that item. If the CMR Responsible Official does not approve the request at this time, it will be returned to the user with an explanation. If the CMR Responsible Official does approve this request, he/she must sign off his/her approval. At this time they may also assign a priority to this request. This priority assists the Equipment Committee in determining the importance of this item to the using service.

3.6.1 Step 1
Select the option Approve Equipment Requests (CMR Official) from the menu option.

3.6.2 Step 2
Select the request transaction to review.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:   ? <RET>

CHOOSE FROM:
43  621-132-96-00005      Final CMR Confirmation
47  621-420-96-00024      Pending CMR Official Review
48  621-420-96-00025      Pending CMR Official Review
49  621-420-96-00027      Pending CMR Official Review
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 47 <RET>   621-420-96-00024      Pending CMR
Official Review

Do you want to view the information related to this request? Yes// <RET>
```

3.6.3 Step 3
Answer either 'Yes' to approve the request or 'No' to disapprove the request.

```
CMR OFFICIAL APPROVAL:   ? <RET>
    Enter 'Yes' if you approve this request.
    Choose from:
        Y        YES
        N        NO
CMR OFFICIAL APPROVAL:  Y <RET>   YES
```

3.6.4 Step 4
If the request is not to be approved, an explanation is required. A mail message will be sent to the requestor which will include the explanation. See 3.6.6 Step 6 for a sample mail message.

```
CMR OFFICIAL APPROVAL:   ? <RET>
    Enter 'Yes' if you approve this request.
    Choose from:
        Y        YES
        N        NO
CMR OFFICIAL APPROVAL:  N <RET>   NO
CMR APPROVAL EXPLANATION:
    1>  <RET>
CMR APPROVAL EXPLANATION:
    1> Don't wish to order these items at this <RET>
    2> time. <RET>
    3> <RET>
EDIT OPTION: <RET>
```

3.6.5 Step 5
The next step is to identify a priority. This priority will show the PPM and the Equipment Committee the importance of this request.

```
CMR PRIORITY: 2// ? <RET>
    Enter the number that you consider to be the priority of this request.
    (1-999)
Priority list for ACQUISITION & MATERIEL MGMT:
1       621-430-96-00003

CMR PRIORITY:  2// <RET>
ENTER YOUR ELECTRONIC SIGNATURE CODE: SIGNATURE <RET>        Thank you.
```

3.6.6 Step 6
This is a sample mail message that will be sent to the requestor when a request is not approved.

```
Subj:   REQUEST NOT APPROVED [#11223]        08 Aug 96 13:42   5 Lines
From:ETRUSER,ONE     in 'IN' basket.                        page 1      **NEW**
-----------------------------------------------------------------------------------------
    Your NX Equipment Request, Transaction #: 621-420-96-00024
    was not approved by CMR Responsible Official, ETRUSER,ONE.
    Explanation:
    Don't wish to order these items at this time
```

3.7 Process Equipment Turn-Ins
The CMR Responsible Official must review and approve Turn-In documents since they are responsible for that equipment.

3.7.1 Approving Turn-In Request
The CMR Responsible Official will be notified when a turn-in request has been generated and will select the Process Equipment Turn-Ins Menu option.

```
Good morning ETRUSER,ONE            You last signed on today at 11:10

There are 3 equipment requests Pending CMR Official Review.

        Enter New Equipment Request
        Edit Equipment Request
        Cancel Equipment Request
        Request Status Report
        Display/Print Equipment Request (CMR)
        Approve Equipment Requests (CMR Official)
        Process Equipment Turn-Ins Menu ...

Select CMR Official Equipment Request Menu Option: PRO <RET> cess Equipment Turn-Ins Menu
```

After selecting the Process Equipment Turn-Ins Menu option, the CMR Official will have the following selections.

```
    Enter Equipment Turn-In Request
    Edit Equipment Turn-In Request
    Cancel Turn-In Request
    Display/Print Turn-In Request
    Approve Equipment Turn-In Request (CMR)

Select Process Equipment Turn-Ins Menu Option:
```

3.7.1.1 Enter Equipment Turn-In Request

Select Enter Equipment Turn-In Request option from menu. A CMR Responsible Official can act as a requestor for entering turn-in documents.

3.7.1.1.1 Step 1

Select the CMR Responsible Official record in which item(s) to be turned in are located.

```
Select CMR NAME:  ? <RET>
Choose from:
    422    SURGERY                        ETRPROVIDER , ONE
    423    SURGERY                        ETRPROVIDER , ONE
    500    RADIOLOGY                      ETRPROVIDER , TWO
    666    RADIOLOGY                      ETRUSER , THREE
    780    ACQUISITION & MATERIEL MGMT    ETRUSER , ONE
    781    ACQUISITION & MATERIEL MGMT    ETRUSER , ONE
Select CMR NAME:  780 <RET>    ACQUISITION & MATERIEL MGMT    ETRUSER,ONE

This Request has been assigned Transaction #:  621-780-96-00012
```

3.7.1.1.2 Step 2
Select the item or items to be turned in.

```
Select REPLACEMENT ITEM NUMBER:  ? <RET>
    Answer with TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER, or
    REPLACEMENT ITEM NUMBER
    You may enter a new TURN-IN LINE ITEM, if you wish
    Please select the entry from the Equipment Inventory file that you
    wish to turn-in.

Choose From:
    3   BLOOD CHEMICAL ANALYZER
    9   BATHTUB ETRVENDOR, FIVE UNIT
    10  BATHTUB ETRVENDOR, F IVE UNIT
    11  BATHTUB ETRVENDOR, F IVE UNIT
    20   ETRVENDOR, S IX CONTROL MONITOR
    22   ETRVENDOR, S IX CONTROL MONITOR
    23   ETRVENDOR, S IX CONTROL MONITOR

Select REPLACEMENT ITEM:  23 <RET> ETRVENDOR, S IX CONTROL MONITOR

    TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
    TURN-IN LINE ITEM DESCRIPTION: ETRVENDOR, S IX CONTROL MONITOR
       Replace <RET>
CSN:  1005-000667
Description:  ETRVENDOR, S IX CONTROL MONITOR
Model #:                        Serial #:
Manufacturer:
Acquisition Value:  $150.00       CMR: 780
    JUSTIFICATION: ? <RET>
    Choose From:
    1   Fair wear and tear
    2   Excess equipment failure/repair
    3   Upgrade
    4   State-of-art technology
    5   Replacement due to loss or damage
    6   Other
Replacement Justification:  4 <RET>      State-of-art technology
Select REPLACEMENT ITEM NUMBER: <RET>
```

3.7.1.1.3 Step 3
Send request to the appropriate CMR Responsible Official for review and approval.

```
Is this request ready for CMR Approval? ? <RET>

A 'Yes' answer moves the request to the next level, a 'No' answer maintains request
at your level.

Is this request ready for CMR Approval? Y <RET> YES
```

3.7.1.2 Edit Equipment Turn-In Request
See 2.11.2 for more information.

3.7.1.3 Cancel Turn-In Request
See 2.11.3 for more information.
3.7.1.4 Display/Print Turn-In Request

```
Select Turn-In TRANSACTION #: ? <RET>
 Answer with TURN-IN REQUEST NUMBER, or TRANSACTION CODE
 Do you want the entire 34-Entry TURN-IN REQUEST List? Y <RET>   (Yes)
Choose from:
   25            621-780-95-00007     Turn-in Completed
   26            621-780-95-00012     Pending PPM Final Disposition
   27            621-323-95-00002     Pending PPM Final Disposition
   28            621-323-95-00003     Pending Warehouse Pickup
   29            621-123-96-00006     Cancelled Request
   30            621-123-96-00007     Cancelled Request
   31            621-666-96-00001     Pending Warehouse Pickup
   38            621-666-96-00010     Pending PPM Review
   39            621-136-96-00002     Pending PPM Review
   49            621-780-96-00001     Pending CMR Official Review
   50            621-780-96-00002     Pending Completion by Requestor
   51            621-780-96-00003     Pending CMR Official Review
   52            621-780-96-00004     Pending CMR Official Review
   53            621-780-96-00006     Pending Completion by Requestor
   54            621-666-96-00013     Pending Completion by Requestor
   55            621-666-96-00015     Pending Completion by Requestor

Select Turn-In TRANSACTION #: 39 <RET> 621-136-96-00002      Pending PPM Review
DEVICE: HOME// <RET>


TRANSACTION CODE: 621-136-96-00002      REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ENGINEERING
REQUEST DATE/TIME: MAR 01, 1996@15:35:55 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,THREE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996             CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS:
    EQ. REQUEST LINE NUMBER:
    ENTRY NUMBER: 51
    MFGR. EQUIPMENT NAME: HYDRAULIC LIFT BED
    MANUFACTURER:
    MODEL:                            SERIAL #:
    NXRN #:                           CATEGORY STOCK NUMBER:
    TOTAL ASSET VALUE:                ACQUISITION DATE:
    CMR: 136                          REPLACEMENT DATE:
    LOCATION:
    JUSTIFICATION: Fair wear and tear
    OTHER JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

    DISPOSAL CONDITION CODE:
    WAREHOUSE OFFICIAL:

TOTAL REPAIR COSTS: 0
```

3.7.1.5 Approve Equipment Turn-In Request

The CMR Responsible Official responsible for the equipment must review and approve any turn-in documents prior to review by the Personal Property Manager.

3.7.1.5.1 Step 1
Select the request you wish to review.

```
Select CMR Official Menu Option: APP <RET> rove Equipment Turn-In Request (CMR)

Select TURN-IN REQUEST TRANSACTION CODE:  ? <RET>
Choose from:
49  621-420-96-00028       Pending CMR Official Review

Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>    621-420-96-00028     Pending CMR Official
Review
DEVICE: HOME// <RET>  LAN
```

3.7.1.5.2 Step 2
The request will display on the screen.

```
TRANSACTION CODE:  621-420-96-00028          REQUESTOR:  ETRUSER , FOUR
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME:  MAR 06, 1996@09:57:56    STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER , ONE
REQUEST STATUS: Pending CMR Official Review
STATUS DATE: MAR 06, 1996

TURN-IN LINE ITEMS: 1
    EQ. REQUEST LINE NUMBER: 345
    MFGR. EQUIPMENT NAME: BINDING SYSTEM
    MANUFACTURER: ETRVENDOR , FOUR
    MODEL:  750                          SERIAL #:  76096
    NXRN #: 18329                        CATEGORY STOCK NUMBER: 3610-438983
    ACQUISITION VALUE:  3296.00          ACQUISITION DATE: MAR 09, 1992
    CMR: 420 SUPPLY (OFFICE)             REPLACEMENT DATE:  MAR 09, 2007
    LOCATION:
    WAREHOUSE OFFICIAL:

CMR OFFICIAL APPROVAL:  Y <RET>   YES

ENTER YOUR ELECTRONIC SIGNATURE CODE:     SIGNATURE <RET>         Thank you.
```

CHAPTER 4 PERSONAL PROPERTY MANAGER (PPM)

The Personal Property Manager (or PPM) has many levels of review for both equipment and turn-in requests. When you sign onto the Equipment Request Menu (PPM), you will see the number and status of equipment and turn-in requests.

```
Good afternoon GEORGE You last signed on today at 12:59 P.M.
Select TERMINAL TYPE NAME: C-VT220// <RET>
    Digital Equipment Corporation VT-220 terminal

There are 3 equipment requests Pending PPM Review.
There are 2 equipment requests Engineering Review Completed.
There are 5 equipment requests Ready for 2237 Processing.

There are 2 turn-in requests Pending PPM Review.
There is 1 turn-in request Pending PPM Final Disposition.

    Review Equipment Requests (PPM)
    Edit Equipment Requests (PPM)
    Cancel Equipment Requests
    Rank Equipment Requests
    Create 2237 (PPM)
    Display/Print Equipment Requests (PPM)
    Equipment Request Reports Menu ...
    Process Equipment Turn-Ins Menu ...

Select Equipment Request Menu (PPM) Option:
```

4.1 Review Equipment Request (PPM)

4.1.1 Step 1

Select request to review. You must determine whether or not the requested item is considered non-expendable (either capitalized or expensed). If you determine that the item is not non-expendable, the request is returned to the requestor with a mail message. A copy of the mail message will go to the CMR Responsible Official who approved the request. An explanation detailing why this item is not considered non-expendable will be included in this message.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 47 <RET>   621-420-96-00024   Pending PPM Review

Do you want to view the information related to this request? Yes// <RET>

Is this NX Equipment?:  ? <RET>
    Enter 'Yes' if this equipment is considered to be non-expendable equipment.
    Choose from:
        Y       YES
        N       NO
Is this NX Equipment?  N <RET>    NO
NX EQUIP EXPLANATION:
    1>  <RET>   ?? An explanation of why this request is not NX is required.
NX EQUIP EXPLANATION:
    1> REALLY SHOULD BE ORDERED THROUGH SUPPLY <RET>
    2> <RET>
EDIT Option: <RET>
```

4.1.2 Step 2

Sample mail message to the requestor and CMR Responsible Official.

```
    Subj:   REQUEST NOT NX      [#13224]        08 Jul 96 14:41       7 Lines
    From:   ETRUSER,F IVE in 'IN' basket.                           Page 1      **NEW**
-------------------------------------------------------------------------------------

    The NX Equipment Request, Transaction #: 47   621-420-96-00024
    is being returned because the line item(s) requested are not
    Non-Expendable.
    Explanation:
    REALLY SHOULD BE ORDERED THROUGH SUPPLY
```

4.1.3 Step 3

A request determined to be non-expendable is sent on to Engineering for their review and approval. See Chapter 5 for information that Engineering will provide for a request.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ? <RET>
Choose from:
    621-780-96-00005        Pending PPM Review
    621-781-96-P00002       Pending PPM Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER:  621-780-96-00005 <RET>   Pending PPM Review

Do you want to view the information related to this request? Yes// <RET>

Is this NX Equipment?:  ? <RET>
    Enter 'Yes' if this equipment is considered to be non-expendable equipment.
    Choose from:
        Y       YES
        N       NO
Is this NX Equipment?  Y <RET>    YES

Transaction sent to Engineering for Review
```

4.1.4 Step 4

After Engineering has reviewed and process the request, the request is returned to the PPM for further processing.

```
Select Equipment Request Menu (PPM) Option: REV <RET> iew Equipment Requests (PPM)
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ??<RET>

Choose from:
  82          621-666-96-00002     Engineering Review Completed
  83          621-666-96-00007     Engineering Review Completed
  89          621-136-96-00010     Pending PPM Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 82 <RET>  621-666-96-00002      Engineering Review
Completed

Do you want to view the information related to this request? Yes//  <RET>    (Yes)
DEVICE: HOME//  <RET>
```

4.1.5 Step 5

The PPM determines if there are any other persons who should review and give their approval for the items in a request. If no further review is needed, the request will go to be prepared for the Equipment Committee's review.

```
CONCURRENCE NEEDED?: ?? <RET>
     Enter 'Yes' if you feel other persons need to review and approve this
     equipment request.
     Choose from:
       Y        YES
       N        NO
CONCURRENCE NEEDED?: N <RET>    (NO)
CONTROLLED ITEM?: N <RET>     (NO)

Transaction sent to be reviewed and ranked for Equipment Committee
```

4.1.6 Step 6

Select any person already in the Concurring Official File or select a new person from the New Person file (200). Also enter the date by which the Concurring Official(s) should either approve or disapprove the request. This date will appear on the mail message. See Chapter 6 for Concurring Official processing steps.

```
CONCURRENCE NEEDED?: Y <RET> (Yes)
Select CONCURRING OFFICIALS: ? <RET>
 Answer with CONCURRING OFFICIALS
      You may enter a new CONCURRING OFFICIALS, if you wish
      Select the person(s) you wish to review and approve this request.
 Answer with CONCURRING OFFICIALS NAME:
   ETRPROVIDER,THREE       ASSISTANT SURGERY CHIEF

Select CONCURRING OFFICIALS: ETRPROVIDER,THREE <RET>
        ...OK? Yes// <RET>    (Yes)
          ASSISTANT SURGERY CHIEF
  Are you adding 'ETRPROVIDER,THREE' as a new CONCURRING OFFICIALS (the 1ST for this EQUIPMENT
REQUEST)? Y <RET>     (Yes)
  DATE CONCURRENCE NEEDED BY: T+30 <RET>  (APR 12, 1996)
Select CONCURRING OFFICIALS: ETRPROVIDER,ONE <RET>
     Are you adding 'ETRPROVIDER,ONE' as a new CONCURRING OFFICIALS (the 2nd)? Y <RET>   (Yes)
  CONCURRING OFFICIALS TITLE:  Chief, A&MMS <RET>
     Are you adding 'ETRPROVIDER,ONE' as a new CONCURRING OFFICIALS (the 2ND for this EQUIPMENT
REQUEST? Y <RET>       (Yes)
  DATE CONCURRENCE NEEDED BY: T+30 <RET>  (Apr 12, 1996)
Select CONCURRING OFFICIALS : <RET>

Transaction sent to Concurring Officials for review
```

4.1.7 Step 7

If multiple concurring officials were assigned to review the request and opinions do not coincide, then the request will be approved if 50% or more approve or will disapprove if 50% or more do not approve the request.

```
Subj: CONCURRENCE NOT APPROVED [#81] 18 Mar 96 15:42 3 Lines
From: ETRUSER,SIX in 'IN' basket.  Page 1  **NEW**
-------------------------------------------------------------------------------------------------------

Equipment Request, Transaction #: 621-136-96-00012 did not pass the
concurrence process. Fifty percent or more of the concurring
officials did not approve this request.

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored
```

4.1.8 Step 8

When concurrence is finished and the request is approved it will be returned to PPM to determine if an item can be designated as a controlled item. After answering that question, requests which are not Initial (associated with a project) will go directly to the Equipment Committee for approval. All other requests will go to be reviewed and ranked for the Equipment Committee.

```
Good afternoon ETRUSER,FIVE You last signed on today at 12:59 P.M.


There is 1 equipment request Pending PPM Review.
There are 2 equipment requests Concurrence Completed
There are 5 equipment requests Ready for 2237 Processing.


Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>


Choose from:
  83            621-666-96-00007      Concurrence Completed
  89            621-136-96-00010      Pending PPM Review


Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET>  621-666-96-00007        Concurrence
Completed

Do you want to view the information related to this request? Yes// <RET>   (Yes)
DEVICE: HOME// <RET>


TRANSACTION NUMBER: 621-666-96-00007    REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,THREE
REQUEST STATUS: Concurrence Completed
STATUS DATE: MAR 14, 1996            REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                      TURN-IN REQUEST:
REQUESTOR PHONE:                     DATE REQUIRED BY: MAY 01, 1996
SORT:                                CLASSIFICATION:
LINE ITEM:
     LINE ITEM NUMBER: 1
     DESCRIPTION:
         FAX MACHINE - VENDOR PROD BRAND
     POTENTIAL VENDOR: ETRVENDOR,ONE
     POTENTIAL VENDOR PTR:            VENDOR PRODUCT #:
     UNIT COST: 550.00               QUANTITY REQUIRED: 1
     TOTAL COST: 550.00              CONTRACT #:
     ITEM STATUS:                    CSN:

JUSTIFICATION:
     NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE IN RECURRING COSTS: INCREASE SUFFICIENT FUNDS BUDGETED?: YES
ANNUAL RECURRING SUPPLY COST: 80.00 TRAINING NEEDED?: NO
EST. TRAINING COST:                   MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00          SPACE AVAILABLE?: YES
LOCATION: COMPUTER                    INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
     Electricity>208V
     Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                      SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
     NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
     NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES            CMR PRIORITY: 1

Press RETURN to continue, or '^' to exit. <RET>

NX EQUIPMENT?: YES                    ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TUITION:                ENG. TRAINING TRAVEL COST:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO           PROJECT NEEDED?:
ENG. PROJECT #:                       CONSTRUCTION/RENOVATION COST:
CONSTRUCTION/RENOVATION TIME:         SPECIAL INSTALLATION: YES
SPECIAL INSTALLATION COST: 80.00      ADDITIONAL TEST EQUIP.: NO
ADDITIONAL TEST EQUIP. COST:          MAINTENANCE IMPACT COST:
ENGINEERING CONTACT: ETRUSER,SEVEN    ENGINEERING CONTACT PHONE:
TOTAL ENGINEERING EST. COST: 80       ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. CONTRACT TYPE: PM         ENG. MAINT. OTHER CONTRACT:
SETS MAINTENANCE MANUALS: 2
```

```
CONSTRUCT/RENOV DESCRIPTION:
SPECIAL INSTALL DESCRIPTION:
    CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE
ADDITIONAL TEST EQUIP EXPLAIN:
ENG. REMARKS:
CONCURRENCE NEEDED?: YES
CONCURRING OFFICIALS:
    NAME: ETRPROVIDER , THREE                    TITLE: ASSISTANT SURGERY CHIEF

Press RETURN to continue, or '^' to exit.   <RET>

    APPROVAL: YES                        APPROVAL DATE: MAR 13, 1996
    COMMENTS:
        WE DEFINITELY NEED THIS.

CONTROLLED ITEM?: NO//  <RET>    (NO)

Transaction sent to be reviewed and ranked for Equipment Committee
```

4.2 Edit Equipment Request (PPM)
The Personl Property Manager may select a request to edit but may not editing any
Engineering data. The request must be sent back if editing is needed.

```
Select Equipment Request Menu (PPM) Option: EDIT <RET>  Equipment Requests (PPM)
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ??<RET>
Choose from:
  78            621-123-96-00002      Pending Equipment Committee Approval
  82            621-666-96-00002      Pending Equipment Committee Review/Rank
  83            621-666-96-00007      Pending Equipment Committee Review/Rank
  89            621-136-96-00010      Pending PPM Review
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 621-666-96-00007 <RET>  Pending Equipment Committee
Review/Rank

Do you want to view the information related to this request? Yes// N <RET>    (NO)
Do you want to edit this request? No// Y <RET>   (Yes)
DATE REQUIRED BY: MAY 1,1996// <RET>
SORT: <RET>
CLASSIFICATION:  <RET>
Select LINE ITEM NUMBER: 1// <RET>
  LINE ITEM NUMBER: 1// <RET>
  DESCRIPTION:
  1>FAX MACHINE - VENDOR PROD BRAND <RET>
  2> <RET>
EDIT Option: <RET>
  POTENTIAL VENDOR: ETRVENDOR,ONE// <RET>
  VENDOR PRODUCT #: <RET>
  UNIT COST: 550.00// <RET>
  QUANTITY REQUIRED: 1// <RET>
  CONTRACT #: <RET>
  PARENT SYSTEM / COMPONENT: PARENT SYSTEM// <RET>
Select LINE ITEM NUMBER: <RET>
JUSTIFICATION:
  1>NEED A FAX MACHINE FOR IRM <RET>
  2> <RET>
EDIT Option: <RET>
CHANGE IN PERSONNEL: NO// <RET>
JCAHO,CAP,SAFETY DEFICIENCY: NO// <RET>
CHANGE IN RECURRING COSTS: INCREASE// <RET>
SUFFICIENT FUNDS BUDGETED?: YES// <RET>
CHANGE RECUR COST EXPLAIN:
  1>NEED FAX PAPER,TONER <RET>
  2> <RET>
EDIT Option: <RET>
ANNUAL RECURRING SUPPLY COST: 80.00// <RET>
TRAINING NEEDED?: NO// <RET>
MAINT. CONTRACT RECOMMENDED: YES// <RET>
MAINT. CONTRACT JUSTIFICATION:
  1>NEED TO KEEP MACHINE IN RUNNING ORDER <RET>
  2> <RET>
EDIT Option: <RET>
MAINT. CONTRACT COST: 100.00// <RET>
SPACE AVAILABLE?: YES// <RET>
LOCATION: COMPUTER// <RET>          1    B     ETRVENDOR,SEVEN    COMPUTER ROOM
INSTALLATION NEEDED?: YES// <RET>
Select UTILITIES REQUIRED: <RET>
  UTILITIES REQUIRED: Electricity>208V// <RET>
Select UTILITIES REQUIRED:  <RET>
OTHER UTILITIES: PHONE LINE// <RET>
SERVICE CONTACT: <RET>
SERVICE CONTACT PHONE: <RET>

Resend to Engineering for Editing? No// <RET>   (No)
```

4.3 Cancel Equipment Request (PPM)

The PPM may select to cancel a request.

```
Enter TRANSACTION #: 57 <RET>   621-780-95-00005B

Service: ETRVENDOR,SEVEN            CMR Official: ETRUSER,ONE
Requestor: ETRUSER,FOUR                Date entered: JUL 31, 1995
Line Items:
     1 ITEM ONE                             $   225.00

Are you sure you want to cancel this transaction? No// Y <RET>   (Yes)
REASON CANCELLED:
  1>OLD REQUEST, NO LONGER NEEDED. <RET>
  2> <RET>
EDIT Option:  <RET>

Transaction #57 has been cancelled.
```

4.4 Rank Equipment Requests

After reviewing requests, a priority ranking should be assigned. You may select the
default rank, enter a rank not yet assigned or enter a rank already in use. If you
enter a rank in use, the other transactions' priorities will shift downward
accordingly.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>

Choose from:
   77             621-123-96-00001     Pending Equipment Committee Review/Rank
   82             621-666-96-00002     Pending Equipment Committee Review/Rank
   83             621-666-96-00007     Pending Equipment Committee Review/Rank

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 77 <RET> 621-123-96-00001 Pending Equipment
Committee Review/Rank

Do you want to view the information related to this request? Yes// N <RET>   (No)
EQUIPMENT COMMITTEE RANKING: 16// ? <RET>
     Enter the Equipment Committee ranking for this request.

Ranking list:
2       621-123-96-00002   HYDRAULIC LIFT
4       621-781-95-00002   WATERHEATER, 100 CUB
9       621-780-95-00008   BATHTUB/SINK
12      621-323-95-00001   TABLE SAW
15      621-123-96-00003   ETRVENDOR,E IGHT COPY MACHINE
16      621-123-96-00001   ETRVENDOR,NINE 120 COMPUTER
EQUIPMENT COMMITTEE RANKING: 16// 5 <RET>
```

4.5 Create 2237 (PPM)

4.5.1 Step 1

In order to create a new 2237 from a equipment request, you must be a valid control
point. Review the Control Point Official and Control Point Clerk user manuals on
how to become a valid control point. As much information as possible will be moved
from the equipment request into the 2237 and will appear as defaults. You can
accept these defaults or change them as necessary.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 50 <RET> 621-420-96-00029 Ready for 2237
Processing
Select FISCAL YEAR: 96// <RET>
Select QUARTER: 2// <RET>
Select CONTROL POINT: 5984  <RET>   5984 FACILITY EQUIPMENT
Enter a year in the following sequence of years.
...1989   1991   1993   1995   1997   1999   2001   ...
First Year of the Multi-Appropriation (36_/_0160): 1995// <RET>

This transaction is assigned transaction number: 621-96-2-5984-0039
FORM TYPE:  REPE <RET> ITIVE AND NON-REP ORDER
SPECIAL REMARKS:
  1> <RET>
EDIT Option: <RET>
COST CENTER: 844100 <RET>     Supply

Line Item #1:
Description:
    FAX MACHINE

BOC: 3121 <RET>   Office Equipment
STOCK NUMBER: <RET>
     Enter the Federal Supply Service (FSS) or other stock number for this
     item, or the manufacturers model number
INTERMEDIATE PRODUCT CODE: <RET>
                                        QTY BEG BAL: 1
Select DELIVERY SCHEDULE: <RET>
VENDOR: ETRVENDOR,EIGHT// <RET>
VENDOR PTR : <RET>
VENDOR ADDRESS1: 111 BAKER STREET// <RET>
VENDOR  ADDRESS2: <RET>
VENDOR  ADDRESS3: <RET>
VENDOR ADDRESS4: <RET>
VENDOR CITY: JOHNSON CITY// <RET>
VENDOR STATE: TN <RET>    TENNESSEE
VENDOR ZIP CODE: 12323 <RET>
VENDOR CONTACT: <RET>
VENDOR PHONE NO.:  <RET>
VENDOR CONTRACT NUMBER:  <RET>
Current Control Point balance: $105277.83
Estimated cost of this request: $2500.00
Total uncommitted balance from current and prior quarters: $404854.39

Is this request ready for approval? Yes// <RET>   (Yes)
Is this request ready for transmission to A&MM/Fiscal? No// Y <RET>   (Yes)
Enter ELECTRONIC SIGNATURE CODE:     CODE <RET>        Thank you.
```

4.5.2 Step 2

If a 2237 was not completed, the equipment request will retain the permanent transaction number and allow you to complete the 2237 process.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 12 <RET>  621-780-94-00004   Approved - Funded
Select FISCAL YEAR: 96// <RET>
Select QUARTER: 2// <RET>
FORM TYPE: NON-REPETITIVE (2237) ORDER// <RET>
TRANSACTION TYPE: OBLIGATION// <RET>
TEMPORARY TRANS. NUMBER: 621-780-94-00004// <RET>
CLASSIFICATION OF REQUEST: <RET>
SORT GROUP: <RET>
DATE OF REQUEST: NOV 27,1995// <RET>
REQUESTING SERVICE: PATIENT CARE// <RET>
DATE REQUIRED: JUL 20,1995// <RET>
PRIORITY OF REQUEST: STANDARD// <RET>
SPECIAL REMARKS:
  1>REMARKS <RET>
  2><RET>
EDIT Option:  <RET>
COST CENTER: 160000 <RET>   Office of Administratio Replace
Select LINE ITEM NUMBER: 1// <RET>
  DESCRIPTION:
  1>TEST ITEMS <RET>
EDIT Option: <RET>
  QUANTITY: 10// <RET>
  UNIT OF PURCHASE: EA// <RET>
  BOC: 3121 Office Equipment Replace <RET>
Select LINE ITEM NUMBER: <RET>
VENDOR: ETRVENDOR ,TEN// <RET>
Current Control Point balance: $999000.00
Estimated cost of this request: $500.00
Total uncommitted balance from current and prior quarters: $999000.00

Is this request ready for approval? Yes// <RET>   (Yes)
Is this request ready for transmission to A&MM/Fiscal? No// Y <RET>   (Yes)
Enter ELECTRONIC SIGNATURE CODE:     CODE <RET>            Thank you.
QUEUE ON DEVICE: <RET>
```

4.6 Display/Print Equipment Request

Use this menu option to print a request to a print or to the screen.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>
Choose from:

  83              621-666-96-00007      Pending Equipment Committee Review/Rank
  84              621-420-96-00001      Approved - Funded
  89              621-136-96-00010      Pending PPM Review
  92              621-136-96-00011      Pending Engineering Signature
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET>  621-666-96-00007   Pending Equipment
Committee Review/Rank

Do you want to view the information related to this request? Yes// <RET>   (Yes)
DEVICE: <RET>
```

This print can be queued.

```
TRANSACTION NUMBER: 621-666-96-00007        REQUESTOR:ETRUSER ,FOUR
REQUESTING SERVICE: ETRVENDOR ,SEVEN
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER ,THREE
REQUEST STATUS: Pending Equipment Committee Review/Rank
STATUS DATE: MAR 14, 1996              REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                        TURN-IN REQUEST:
REQUESTOR PHONE:                       DATE REQUIRED BY: MAY 01, 1996
SORT:                                  CLASSIFICATION:
LINE ITEM:
    LINE ITEM NUMBER: 1
    DESCRIPTION:
        FAX MACHINE - VENDOR PROD BRAND
    POTENTIAL VENDOR: ETRVENDOR ,ONE
    POTENTIAL VENDOR PTR:              VENDOR PRODUCT #:
    UNIT COST: 550.00                  QUANTITY REQUIRED: 1
    TOTAL COST: 550.00                 CONTRACT #:
    ITEM STATUS:                       CSN:
JUSTIFICATION:
    NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                 JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE  IN  RECURRING  COSTS:  INCREASE  SUFFICIENT  FUNDS  BUDGETED?:  YES
ANNUAL RECURRING SUPPLY COST: 80.00 TRAINING NEEDED?: NO
EST. TRAINING COST:                    MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00           SPACE AVAILABLE?: YES
LOCATION: COMPUTER                     INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
    Electricity>208V
    Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                       SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
    NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
    NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES             CMR PRIORITY: 1
NX EQUIPMENT?: YES                     ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TUITION:                 ENG. TRAINING TRAVEL COST:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO            PROJECT NEEDED?:
ENG. PROJECT #:                        CONSTRUCTION/RENOVATION COST:
CONSTRUCTION/RENOVATION TIME:          SPECIAL INSTALLATION: YES
SPECIAL INSTALLATION COST: 80.00       ADDITIONAL TEST EQUIP.: NO
ADDITIONAL TEST EQUIP. COST:           MAINTENANCE IMPACT COST:
ENGINEERING CONTACT: ETRUSER ,SEVEN    ENGINEERING CONTACT PHONE:
TOTAL ENGINEERING EST. COST: 80        ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. CONTRACT TYPE: PM          ENG. MAINT. OTHER CONTRACT:
SETS MAINTENANCE MANUALS: 2
CONSTRUCT/RENOV DESCRIPTION:
SPECIAL INSTALL DESCRIPTION:
    CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE
ADDITIONAL TEST EQUIP EXPLAIN:
ENG. REMARKS:
CONCURRENCE NEEDED?: NO
EQUIPMENT COMMITTEE RANKING:           CONTROLLED ITEM?: NO
SHORT DESCRIPTION:
```

4.7 Equipment Request Reports Menu
This menu option allows for PPM to print certain specialized reports.

4.7.1 Controlled Equipment Report

The Controlled Equipment Report prints transactions that have controlled items.

4.7.2 Request Status Report

The Request Status Report prints the status of all transactions for the PPM.

```
Equipment Request Status Report by PPM: ETRUSER,FIVE
                                              Date      Status
Transaction #     Status                      Entered   Date
--------------------------------------------------------------------------
621-123-96-00001 Pending Equipment Committee Approval  11/07/95  03/14/96
621-123-96-00002 Pending Equipment Committee Approval  11/07/95  01/25/96
621-123-96-00003 Pending Equipment Committee Approval  11/07/95  02/27/96
621-123-96-00004 Approved - Funded                     11/22/95  03/07/96
621-123-96-00005 Returned by PPM                       11/22/95  03/13/96
621-136-96-00010  Pending PPM Review                   03/07/96  03/07/96
621-136-96-00011 Pending Engineering Signature         03/13/96  03/13/96
621-420-96-00001 Approved - Funded                     02/27/96  02/27/96
621-423-94-00003 2237 Created                          12/08/93  02/14/96
621-423-94-P00001 2237 Created                         12/08/93  08/07/95
621-666-96-00002 Pending Equipment Committee Review/Ra 01/23/96  03/13/96
621-666-96-00007 Pending Equipment Committee Review/Ra 02/01/96  03/14/96
621-780-94-00011 2237 Created                          05/18/94  02/14/96
621-782-95-00003C Disapproved - Do Not Resubmit        07/25/95  07/27/95
621-782-95-00003D Pending Equipment Committee Approval 07/25/95  08/04/95
```

4.7.3 Turn-In Status by CMR

This report prints in CMR order.

```
START WITH CMR: FIRST// <RET>
DEVICE: <RET>
TURN IN REPORT BY CMR                          MAR 19,1996  14:13    PAGE 1
TRANSACTION #    SERVICE    CMR OFFICIAL
        EE #         EQUIPMENT NAME
------------------------------------------------------------------------------------
        CMR: 136
621-136-96-00002  ENG         ETRUSER,THREE
        51         HYDRAULIC LIFT BED
        CMR: 323
621-323-95-00003  IRM         ETRUSER,ONE
        61           REFRIGERATOR,FOOD (23 cubft)
        CMR: 666
621-666-94-00013  IRM         ETRUSER,THREE
        37           ETRVENDOR1,ONE
621-666-96-00006  IRM         ETRUSER,THREE
        65           ETRVENDOR,NINE 60
        CMR: 780
621-780-94-00012  PTC         ETRUSER,ONE
        3          BLOOD CHEMICAL ANALYZER
        30           ETRVENDOR,SIX CONTROL MONITOR
621-780-95-00007  PTC         ETRUSER,ONE
        9           BATHTUB ETRVENDOR,FIVE UNIT
```

4.7.4 Turn-In Status by Service
This report prints in Service order.

```
START WITH REQUESTING SERVICE: FIRST// <RET>
DEVICE: <RET>
TURN-IN REPORT BY SERVICE                      MAR 19,1996  14:13    PAGE 1
TRANSACTION #      SERVICE   CMR OFFICIAL
       EE #        EQUIPMENT NAME
-------------------------------------------------------------------------------

        REQUESTING SERVICE: ENGINEERING
621-136-96-00002  ENG        ETRUSER,THREE
        51         HYDRAULIC LIFT BED
        REQUESTING SERVICE: ETRVENDOR,SEVEN
621-666-94-00013  IRM        ETRUSER,THREE
        37         ETRVENDOR1,ONE
        REQUESTING SERVICE: PATIENT CARE
621-780-94-00012  PTC        ETRUSER,ONE
        3          BLOOD CHEMICAL ANALYZER
621-780-95-00003  PTC    ETRUSER,ONE
        30         ETRVENDOR,SIX CONTROL MONITOR
621-780-95-00007  PTC    ETRUSER,ONE
        9          BATHTUB ETRVENDOR,FIVE UNIT
        62         REFRIGERATOR,FOOD (23 cubft)
```

4.7.5 Turn-In Status by Transaction Number
This report prints in turn-in transaction number order in the same format as 4.7.3 and 4.7.4.

4.7.6 Turn-In Status Report
This report prints turn-ins by their current status.

```
TURN-IN STATUS REPORT                          MAR 14,1996  15:51    PAGE 1
TRANSACTION #      SERVICE   CMR OFFICIAL
-------------------------------------------------------------------------------
        REQUEST STATUS: Cancelled Request
621-666-94-00016  IRM        ETRUSER,THREE

        REQUEST STATUS: Pending Completion by Requestor
621-136-96-00009  ENG        ETRUSER,THREE
621-420-96-00003  SRG        ETRUSER,EIGHT

        REQUEST STATUS: Pending PPM Final Disposition
621-780-95-00012  IRM        ETRUSER,ONE

        REQUEST STATUS: Pending PPM Review
621-323-95-00003  IRM        ETRUSER,ONE
621-136-96-00002  ENG        ETRUSER,THREE

        REQUEST STATUS: Pending Warehouse Pickup
621-323-95-00002  IRM        ETRUSER,ONE

        REQUEST STATUS: Pending Work Order Completion

        REQUEST STATUS: Turn-in Completed
621-780-95-00003  IRM        ETRUSER,ONE
621-780-95-00007  IRM        ETRUSER,ONE
```

4.8 Process Turn-Ins Menu
PPM must review any turn-in requests to determine if a work order must be created in order for the equipment to be picked-up by the warehouse.

4.8.1 Process Turn-In Request

```
TRANSACTION CODE:  621-420-96-00016               REQUESTOR:  ETRUSER,NINE
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: FEB 06, 1996@14:01:57          STATION NUMBER:  621
CMR RESPONSIBLE OFFICIAL:
REQUEST STATUS: Pending PPM Final Disposition
STATUS DATE: FEB 06, 1996                         CMR OFFICIAL APPROVAL:  YES
CMR OFFICIAL EXPLANATION:

Select ITEM NUMBER: 10327// <RET>
    DISPOSAL CONDITION CODE:?? <RET>
      Choose from:
     1       EXCHANGE/SALE (EXCHANGED)
     2       EXCHANGE/SALE (SOLD)
     3       VA EXCESS TO OGA
     4       VA EXCESS TO SCRAP
     5       VA EXCESS ABAANDONED/DESTROYED
     6       VA EXCESS SOLD BY VA
     7       STATION EXCESS REASSIGNED WITHIN VA
    DISPOSITION METHOD: 4 <RET>        VA EXCESS TO SCRAP
    DISPOSITION VALUE: 0 <RET>
Select REPLACEMENT ITEM NUMBER: <RET>
ENTER YOUR ELECTRONIC SIGNATURE CODE: CODE <RET>     Thank you.
```

4.8.2 Disposition of a Turn-In Document
After Engineering has processed the work order (if one was needed), and the Warehouse has picked up the equipment, the turn-in is sent to the PPM for final disposition and processing of the item(s).

```
TRANSACTION CODE: 621-780-96-00012                REQUESTOR:  ETRUSER,NINE
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: MAR 16, 1996                   STATION NUMBER:  621
CMR RESPONSIBLE OFFICIAL:
REQUEST STATUS: Pending PPM Final Disposition
STATUS DATE: MAR 16, 1996                         CMR OFFICIAL APPROVAL:  YES
CMR OFFICIAL EXPLANATION:

Select ITEM NUMBER: 6// <RET>
    DISPOSAL CONDITION CODE: Scrap// <RET>
    DISPOSITION METHOD: <RET>
    VOUCHER #:<RET>
    PROCEED $:<RET>
    DISPOSITION VALUE: <RET>
    TURN-IN VALUE: <RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE:    CODE  <RET>        Thank you.
```

CHAPTER 5 ENGINEERING

If you have been designated the Engineering contact person to process equipment requests, you may have, as a secondary menu, the option to Approve Equipment Requests. Select this option to process requests that have been forwarded to you from the Personal Property Manager. See Chapter 4.

5.1 Step 1
Your main menu may look like the following:

```
There are 2 Equipment Requests to review.

Select Engineering Main Menu Option:

   WO      Work Order & MERS ...
   PLAN    Project Planning ...
   TRK     Project Tracking ...
   EQ      Equipment Management ...
   ENM     Program Management ...
   SP      Space/FAcility Management ...
   FSA     2162 Report of Accident ...
   XFER    Assign (Transfer) Electronic Work Orders

Select Engineering Main Menu Option: App<RET>rove Equipment Request (Engineering)
```

5.2 Step 2
Select the request you wish to review. The Engineering Department when reviewing an equipment request, must fill out information that may have an impact on them.

```
There is 1 equipment request Pending Engineering Review.

Approve Equipment Request (Engineering)

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?<RET>
 Answer with EQUIPMENT REQUEST NUMBER, or TRANSACTION NUMBER
 Do you want the entire EQUIPMENT REQUEST List? Y <RET>    (Yes)
Choose from:
   83              621-666-96-00007      Pending Engineering Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83<RET> 621-666-96-00007 Pending Engineering
Review

Do you want to view the information related to this request? Yes//  <RET>    (Yes)
DEVICE: HOME//  <RET>
```

5.3 Step 3

Some fields that the requestor entered may be reviewed and changed by the Engineering department if needed.

```
SPACE AVAILABLE?: YES// <RET>
LOCATION: COMPUTER// <RET>          1    B      ETRVENDOR,SEVEN     COMPUTER ROOM
INSTALLATION NEEDED?: NO// <RET>
     Enter 'Yes' if the Engineering Department must install equipment
     Choose from:
      Y        YES
      N        NO
INSTALLATION NEEDED?: NO// Y <RET>     YES
Select UTILITIES REQUIRED: ? <RET>
 Answer with UTILITIES REQUIRED
Choose from:
   Electricity>208V
   Other

     You may enter a new UTILITIES REQUIRED, if you wish
     Select as many utilities that are needed for installation.
Choose from:
      0            None
      1             Air
      2             Gas
      3           Vacuum
      4             ADP
      5         Plumbing
      6 Electricity-110V
      7 Electricity>208V
      8 Emergency Power
      9 Fire Sprinkler
      10        Exhaust
      11           A/C
      12          Steam
      13          Other
   UTILITIES REQUIRED: Electricity>208V// <RET>
Select UTILITIES REQUIRED: 13 <RET>
   UTILITIES REQUIRED: Other// <RET>
Select UTILITIES REQUIRED: <RET>
OTHER UTILITIES: PHONE LINE// <RET>
MAINT. CONTRACT RECOMMENDED: YES// <RET>
MAINT. CONTRACT JUSTIFICATION:
  1>NEED TO KEEP MACHINE IN RUNNING ORDER <RET>
EDIT Option: <RET>
MAINT. CONTRACT COST: 100.00// <RET>
```

5.4 Step 4

Another impact to the Engineering Department is whether anyone in there may need special training in order to maintain the requested equipment if it is acquired. If additional training is needed, other questions will need to be answered concerning tuition and travel costs associated with that training as well as the potential training vendor. When entering the training vendor, the Vendor file will be checked, or it will accept a free text vendor.

```
ENG. MAINTENANCE TRAINING: NO// ? <RET>
    Enter 'Yes' if additional Engineering maintenance training is needed after
    proposed equipment is purchased.
    Choose from:
        Y       YES
        N       NO
ENG. MAINTENANCE TRAINING: Y <RET>    YES
ENG. TRAINING TUITION: ? <RET>
    Enter the estimated amount of any Engineering training tuition.
ENG. TRAINING TUITION: 200.00 <RET>
ENG. TRAVEL COST: ? <RET>
    Enter the estimated amount of travel cost for Engineering training
ENG. TRAVEL COST: 150.00 <RET>
ENG. TRAINING VENDOR: ? <RET>
    Enter a vendor (up to 50 characters) that may conduct Engineering training
ENG. TRAINING VENDOR: ETRVENDOR, TEN <RET>                          NO. 2
        ORDERING ADDRESS:
ENG. TRAINING LOCATION: ? <RET>
    Enter where Engineering training may take place (up to 50 characters)
ENG. TRAINING LOCATION:  NEW YORK CITY <RET>
```

5.5 Step 5

The next question is whether any special construction/renovation is needed to accommodate the new equipment, if acquired. If you answer 'Yes', the next question will be whether a project had been submitted and approved in order to accomplish the necessary construction/renovation. The next inquiry will be for the project number. If a project has not yet been developed, this inquiry should be left blank. A description of the nature and location of the construction/renovation will be required in the next field. Enter the estimated construction/renovation cost and number of calendar days that would be required for completion of any special construction/renovation.

```
CONSTRUCTION/RENOVATION: NO// ? <RET>
    Enter 'Yes' if there is any special construction needs
    Choose from:
        Y       YES
        N       NO
CONSTRUCTION/RENOVATION: NO// Y <RET>     YES
PROJECT NEEDED?: NO// ? <RET>
    Enter 'Yes' if a Project # is needed
    Choose from:
        Y       YES
        N       NO
PROJECT NEEDED?: NO// Y <RET> YES
PROJECT NUMBER: 621-789 <RET>
CONSTRUCT/RENOV DESCRIPTION:
    1> <RET> ?? Description is required
CONSTRUCT/RENOV DESCRIPTION:
    1> need to build special holding box for item <RET>
    2><RET>
EDIT OPTION: <RET>
CONSTRUCTION/RENOVATION COST: ? <RET>
    Enter the estimated cost of new construction or renovation for this
    request.
CONSTRUCTION/RENOVATION COST: 200.00 <RET>
CONSTRUCTION/RENOVATION TIME: ? <RET>
    Enter an estimated time it would take to complete construction o r
    renovation.
CONSTRUCTION/RENOVATION TIME: 2 days <RET>
```

5.6 Step 6

Special installation questions should only be answered if anything other than normal utility connections are needed in order for the equipment to be installed and made operational. For example, a room may be large enough to contain a large piece of equipment, but the door may have to be removed in order to move the equipment into the room, or plumbing might be required. This information will be entered in the special installation requirement word-processing field.

```
SPECIAL INSTALLATION: ? <RET>
    Enter 'Yes' if work other than normal utility connection is
    needed to install equipment
SPECIAL INSTALLATION: Y <RET>     YES
SPECIAL INSTALL DESCRIPTION:
    1> <RET> ?? Description is required
SPECIAL INSTALL DESCRIPTION:
    1> Need to remove door in order to move equipment<RET>
    2> into room. <RET>
    3><RET>
EDIT OPTION: <RET>
SPECIAL INSTALLATION COST: ? <RET>
    Enter the estimated cost of the special installation
SPECIAL INSTALLATION COST: 399.00 <RET>
```

5.7 Step 7

If additional test equipment is needed to maintain the requested equipment in operational order, then the additional test equipment field must be answered 'Yes'.

```
ADDITIONAL TEST EQUIP.: ? <RET>
    Answer 'Y' if any additional equipment is needed to test or calibrate the
    new equipment.
    Choose from:
        Y       YES
        N       NO
ADDITIONAL TEST EQUIP.: Y <RET>       YES
ADDITIONAL TEST EQUIP EXPLAIN:
    1> <RET> ?? Explanation is required
ADDITIONAL TEST EQUIP EXPLAIN:
    1> A new ohm reader is needed to keep this <RET>
    2> equipment in shape. <RET>
    3><RET>
EDIT OPTION: <RET>
ADDITIONAL TEST EQUIP COST: ? <RET>
    Enter an estimated cost for any additional test equipment
ADDITIONAL TEST EQUIP COST: 80.00 <RET>
```

5.8 Step 8

If there is another person who should be the Engineering contact for this request, enter it at this point.

```
ENGINEERING CONTACT:
```

5.9 Step 9

Whether Engineering desires a maintenance contract will be the next question that must be answered. Engineering desires to have at least a minimum of two sets of maintenance manuals on hand. Be sure to enter any estimated impact cost on the maintenance of the items in the request. This will be especially important to the Equipment Committee in their consideration of the request.

```
ENG. MAINTENANCE CONTRACT: YES// ? <RET>
    Enter 'Yes' if Engineering has made the determination of importance of
    having a maintenance contract.
ENG. MAINTENANCE CONTRACT: YES// <RET>
ENG. MAINT. CONTRACT TYPE: ? <RET>
    Select the appropriate type of maintenance contract for Engineering
    Choose from:
        1   Full Maintenance
        2   PM
        3   Parts Only
        4   Screening Contract
        5   Other
ENG. MAINT. CONTRACT TYPE: 5 <RET>    Other

SETS MAINTENANCE MANUALS: 2// ? <RET>
    Enter the minimum sets of maintenance manuals to keep on hand (2-10)
SETS MAINTENANCE MANUALS: 2// <RET>
MAINTENANCE IMPACT COST: ? <RET>
    Enter an estimated amount that the purchase of this equipment may impact
    on maintenance
MAINTENANCE IMPACT COST: 100.00 <RET>
```

5.10 Step 10

A general remarks field has been added for Engineering to make any comments not otherwise covered.

```
ENG. REMARKS:
    1><RET>


ENTER YOUR ELECTRONIC SIGNATURE CODE:       CODE <RET>        Thank you

Transaction returned to PPM
```

5.11 Step 11

Displaying a request for the Engineering user.

```
Do you want to view the information related to this request? Yes// <RET>   (Yes)
DEVICE: HOME// <RET>

TRANSACTION NUMBER: 621-666-96-00007      REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,THREE
REQUEST STATUS: Pending Engineering Review
STATUS DATE: MAR 13, 1996              REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                        TURN-IN REQUEST:
REQUESTOR PHONE:                       DATE REQUIRED BY: MAY 01, 1996
SORT:                                  CLASSIFICATION:
LINE ITEM:
    LINE ITEM NUMBER: 1
    DESCRIPTION:
        FAX MACHINE - VENDOR PROD BRAND
    POTENTIAL VENDOR: ETRVENDOR,ONE
    POTENTIAL VENDOR PTR:              VENDOR PRODUCT #:
    UNIT COST: 550.00                  QUANTITY REQUIRED: 1
    TOTAL COST: 550.00                 CONTRACT #:
    ITEM STATUS:                       CSN:

JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

    NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                 JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE  IN  RECURRING  COSTS:  INCREASE  SUFFICIENT  FUNDS  BUDGETED?:  YES
ANNUAL RECURRING SUPPLY COST: 80.00 TRAINING NEEDED?: NO
EST. TRAINING COST:                    MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00           SPACE AVAILABLE?: YES
LOCATION: COMPUTER                     INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
    Electricity>208V
    Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                       SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
    NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
    NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES             CMR PRIORITY: 1

Press RETURN to continue, or '^' to exit. <RET>
NX EQUIPMENT?: YES
```

CHAPTER 6 OTHER CONCURRING OFFICIALS

6.1 Step 1

If you are assigned to be a Concurring Official, you will receive the following mail message from the Personal Property Manager.

```
Subj:   CONCURRENCE NEEDED  [#32234]     04 AUG 96  17:25     3 Lines
From:     ETRUSER,FIVE    in 'IN' basket.                    Page 1     **NEW**
-------------------------------------------------------------------------------------------------------------------
You were selected to review NX Equipment Request,
Transaction #: 621-666-96-00007 for your concurring
opinion. Please review and indicate your approval or
not by AUG 16, 1996.
```

6.2 Step 2

All designated concurring officials should be assigned the appropriate menu option in order to process requests sent to them.

```
There is 1 equipment request Pending Concurrence.

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ? <RET>
 Answer with EQUIPMENT REQUEST NUMBER, or TRANSACTION NUMBER
 Do you want the entire EQUIPMENT REQUEST List? Y <RET>    (Yes)
Choose from:
   83              621-666-96-00007      Pending Concurrence

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET> 621-666-96-00007     Pending Concurrence
```

6.3 Step 3

They may review the request prior to indicating their decision either to the screen or printer.

```
Do you want to view the information related to this request?: Yes// <RET>
DEVICE: HOME// <RET>
```

```
TRANSACTION NUMBER: 621-666-96-00007     REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,THREE
REQUEST STATUS: Pending Concurrence
STATUS DATE: MAR 13, 1996                REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                          TURN-IN REQUEST:
REQUESTOR PHONE:                         DATE REQUIRED BY: MAY 01, 1996
SORT:                                    CLASSIFICATION:
LINE ITEM:
    LINE ITEM NUMBER: 1
    DESCRIPTION:
        FAX MACHINE - VENDOR PROD BRAND
    POTENTIAL VENDOR: ETRVENDOR,ONE
    POTENTIAL VENDOR PTR:                VENDOR PRODUCT #:
    UNIT COST: 550.00                    QUANTITY REQUIRED: 1
    TOTAL COST: 550.00                   CONTRACT #:
    ITEM STATUS:                         CSN:

JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>


    NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                   JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE IN RECURRING COSTS: INCREASE  SUFFICIENT  FUNDS  BUDGETED?:  YES
ANNUAL RECURRING SUPPLY COST: 80.00 TRAINING NEEDED?: NO
EST. TRAINING COST:                      MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00             SPACE AVAILABLE?: YES
LOCATION: COMPUTER                       INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
    Electricity>208V
    Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                         SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
    NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
    NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES               CMR PRIORITY: 1

Press RETURN to continue, or '^' to exit. <RET>

NX EQUIPMENT?: YES                        ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TUITION:                    ENG. TRAINING TRAVEL COST:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO               PROJECT NEEDED?:
ENG. PROJECT #:                           CONSTRUCTION/RENOVATION COST:
CONSTRUCTION/RENOVATION TIME:             SPECIAL INSTALLATION: YES
SPECIAL INSTALLATION COST: 80.00          ADDITIONAL TEST EQUIP.: NO
ADDITIONAL TEST EQUIP. COST:              MAINTENANCE IMPACT COST:
ENGINEERING CONTACT: ETRUSER,SEVEN        ENGINEERING CONTACT PHONE:
TOTAL ENGINEERING EST. COST: 80           ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. CONTRACT TYPE: PM             ENG. MAINT. OTHER CONTRACT:
SETS MAINTENANCE MANUALS: 2
CONSTRUCT/RENOV DESCRIPTION:
SPECIAL INSTALL DESCRIPTION:
    CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE
ADDITIONAL TEST EQUIP EXPLAIN:
ENG. REMARKS:
```

6.3 Step 3

Approving the request.

```
Do you approve this Equipment Request?: Y <RET>        (YES)
COMMENTS:
    1>NO PARTICULAR COMMENTS <RET>
    2><RET>
EDIT Option: <RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE:     CODE <RET>         Thank you.

Transaction will be returned to PPM for final review
```

Other Concurring Officials

CHAPTER 7 EQUIPMENT COMMITTEE

If you are responsible for processing the Equipment Committee's decisions, you may have the Equipment Committee menu assigned.

```
There are 10 equipment requests Pending Equipment Committee Approval.

        Rank Equipment Requests
        Equipment Request Summary Report
        Outstanding Equipment Requests Report
        Process Equip Committee Decisions
        Service Priority Report

Select Equipment Committee Menu Option:
```

7.1 Rank Equipment Requests
This option may be assigned to the Personal Property Manager (PPM) or be done at the Equipment Committee Level. Please review section 4.4 for information on how to do this option.

7.2 Equipment Request Cost Summary Report
This report (which must be run as a 132 Column report) will help the Equipment Committee in reviewing and approving requests. It provides a summary of all costs entered during the equipment request process.

Transaction #	Annual Line Item Cost	Recurring Cost	Training Cost	Training Contract Cost	Tuition Cost	Travel Cost	Constr. Renov. Cost	Special Install Cost	Maint. Equip Cost	Impact Cost	Total
Service: ETRVENDOR1,TWO											
621-123-96-00003	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00
Subtotal for ETRVENDOR1,TWO:											100.00
Service: ETRVENDOR,SEVEN											
621-782-95-00003B	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	125.00
621-782-95-00003D	215.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	215.00
621-781-95-00001B	1000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1000.00
621-780-95-00008	2250.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2250.00
621-323-95-00001	6000.00	0.00	0.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	6200.00
621-123-96-00001	200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00
621-666-96-00002	1000.00	0.00	0.00	0.00	0.00	0.00	0.00	300.00	0.00	0.00	1300.00
621-666-96-00007	550.00	80.00	0.00	100.00	0.00	0.00	0.00	80.00	0.00	0.00	810.00
Subtotal for ETRVENDOR,SEVEN:											12100.00
Total:											12200.00

EQUIPMENT REQUEST COST SUMMARY REPORT   Mar 14, 1996 7:47 pm PAGE: 1

7.3 Outstanding Equipment Requests Report

This report is an informational report for the Equipment Committee. It prints requests that are currently in the Equipment Committee's review process. It will display the Parent System line items and other general information about the request.

```
Requests by Service Priority              MAR 14,1996  19:47    PAGE 1
TRANSACTION #      PRIORITY           TYPE      COST QUANTITY       TOTAL
                                      PARENT SYSTEM
      ITEM DESCRIPTION              / COMPONENT
                                      JUSTIFICATION
-------------------------------------------------------------------------------------------

          ETRVENDOR1 , TWO
621-323-95-00001   1                  REPL   3000.00    2        6000.00
      REFRIGERATOR                    PARENT SYSTEM
                                        NEED NEW ONE

          ETRVENDOR , SEVEN
621-666-96-00007     1                ADDI     550.00    1        550.00
      FAX MACHINE - ETRVENDOR,ONE             PARENT SYSTEM
                                        NEED A FAX MACHINE FOR IRM
```

7.4 Process Equip Committee Decisions

This menu should be used after priority ranking has been applied to requests and is used to assign a final decision on equipment requests. Select the methodology for processing requests. Five different methods have been created to provide quick and easy processing of requests.

```
    Select one of the following:

        1        APPROVE/FUNDED ALL LINE ITEMS
        2        APPROVE/PENDING ALL LINE ITEMS
        3        DISAPPROVE ALL LINE ITEMS
        4        DEFER ALL LINE ITEMS
        5        PROCESS INDIVIDUAL LINE ITEMS

Select the apppropriate approval methodology to process multiple transactions.

Option 1 - APPROVE/FUNDED ALL LINE ITEMS should be used when all line items in a transaction have
been designated 'approved and funded' and are ready for 2237 processing.
Option 2 - APPROVE/PENDING ALL LINE ITEMS should be used when all line items in a transaction
have been approved, but funding is still pending.
Option 3 - DISAPPROVE ALL LINE ITEMS should be used when all line items in a transaction have not
been approved.
Option 4 - DEFER ALL LINE ITEMS should be used when all line items in a transaction should be
deferred until a later decision cycle.
Option 5 - PROCESS INDIVIDUAL LINE ITEMS should be used when some line items in the same
transaction have been approved and some have not been approved.
```

7.4.1 Step 1

After selecting the method of approving/disapproving requests, a list of requests will display from which you can select the requests which will be processed accordingly. The following display shows the process for 'Approve/Pending All Line Items' which will change the status for all selected items to be 'Approved-Pending Funding'. This status allows for the creation of a 2237 when appropriate funding is available.

```
              APPROVE/PENDING ALL LINE ITEMS in the following Equipment Requests

Num#    Rank   Request #              Service                    # Items    Amount
-----------------------------------------------------------------------------------------
1       5      621-782-95-00003D      ETRVENDOR , SEVEN             2        $  215.00
2       14     621-781-95-00001B      ETRVENDOR , SEVEN             1        $ 1000.00
3       9      621-780-95-00008       ETRVENDOR , SEVEN             1        $ 2250.00
4       12     621-323-95-00001       ETRVENDOR , SEVEN             1        $ 6200.00
5       7      621-780-95-00013B      ETRVENDOR , SEVEN             1        $ 1499.00
6       3      621-780-95-00001       ETRVENDOR , SEVEN             0        $    0.00
7       9      621-323-95-00001A      ETRVENDOR , SEVEN             1        $ 6200.00
8       5      621-123-96-00001       ETRVENDOR , SEVEN             1        $  200.00
9       1      621-123-96-00003       ETRVENDOR1 , TWO              1        $  100.00
10      3      621-666-96-00002       ETRVENDOR , SEVEN             3        $ 1300.00
11      2      621-666-96-00007       ETRVENDOR , SEVEN             1        $  810.00
Select numbers to process: (1-11): 1 <RET>

Qty: 5              Price: 25          Total: 125
Description:
    TEST ITEM 1

Qty: 3              Price: 30          Total: 90
Description:
    TEST ITEM 2

Does this request need a final confirmation from the responsible CMR Official? N <RET>    (No)
```

7.4.2 Step 2

Selecting 'Disaprove All Line Items" means that all chosen requests will be returned to the requestor and CMR Official with the status of 'Disapproved-Do No Resubmit'.

```
              DISAPPROVE ALL LINE ITEMS in the following Equipment Requests

Num#    Rank   Request #              Service                    # Items    Amount
-----------------------------------------------------------------------------------------
1       14     621-781-95-00001B      ETRVENDOR , SEVEN             1        $ 1000.00
2       9      621-780-95-00008       ETRVENDOR , SEVEN             1        $ 2250.00
3       12     621-323-95-00001       ETRVENDOR , SEVEN             1        $ 6200.00
4       7      621-780-95-00013B      ETRVENDOR , SEVEN             1        $ 1499.00
5       3      621-780-95-00001       ETRVENDOR , SEVEN             0        $    0.00
6       9      621-323-95-00001A      ETRVENDOR , SEVEN             1        $ 6200.00
7       5      621-123-96-00001       ETRVENDOR , SEVEN             1        $  200.00
8       1      621-123-96-00003       ETRVENDOR1 , TWO              1        $  100.00
9       3      621-666-96-00002       ETRVENDOR , SEVEN             3        $ 1300.00
10      2      621-666-96-00007       ETRVENDOR , SEVEN             1        $  810.00
Select numbers to process: (1-10): 5 <RET>
```

7.4.3 Step 3

Selecting 'Defer All Line Items' means that the requestor or CMR Official may resubmit the request at another time.

```
              DEFER ALL LINE ITEMS in the following Equipment Requests

Num#    Rank   Request #              Service                  # Items    Amount
--------------------------------------------------------------------------------
1       14     621-781-95-00001B   ETRVENDOR , SEVEN             1        $ 1000.00
2       9      621-780-95-00008    ETRVENDOR , SEVEN             1        $ 2250.00
3       12     621-323-95-00001    ETRVENDOR , SEVEN             1        $ 6200.00
4       7      621-780-95-00013B   ETRVENDOR , SEVEN             1        $ 1499.00
5       9      621-323-95-00001A   ETRVENDOR , SEVEN             1        $ 6200.00
6       5      621-123-96-00001    ETRVENDOR , SEVEN             1        $  200.00
7       1      621-123-96-00003     ETRVENDOR1 , TWO             1        $  100.00
8       3      621-666-96-00002    ETRVENDOR , SEVEN             3        $ 1300.00
9       2      621-666-96-00007    ETRVENDOR , SEVEN             1        $  810.00
Select numbers to process: (1-9): 5 <RET>

Qty: 2              Price: 3000        Total: 6000
Description:
   REFRIGERATOR
```

7.4.4 Step 4

Processing individual line items gives you the capability to partially approve or disapprove a request. You may either approve/disapprove multiple line items or even separate by the quantity requested. If the requestor asked for a quantity of two expensive items, and the budget could approve one, the item can be split. Requests will be split according to final status and quantity approved. The transaction number will remain the same but appended with A, B, C, etc. to show that it is split off the original request.

```
                  PROCESS INDIVIDUAL LINE ITEMS in the following Equipment Requests

Num#    Rank   Request #                Service                       # Items   Amount
-------------------------------------------------------------------------------------------
1      9      621-780-95-00008         ETRVENDOR , SEVEN               1       $ 2250.00
2      12     621-323-95-00001         ETRVENDOR , SEVEN               1       $ 6200.00
3      5      621-123-96-00001         ETRVENDOR , SEVEN               1       $  200.00
4      1      621-123-96-00003         ETRVENDOR1 , TWO                1       $  100.00
5      3      621-666-96-00002         ETRVENDOR , SEVEN               3       $ 1300.00
6      2      621-666-96-00007         ETRVENDOR , SEVEN               1       $  810.00
Select numbers to process: (1-6: 5 <RET>

Qty: 2              Price: 400.00      Total: 800
Description:
      17 inch computer monitor.

      Select one of the following:
            AF          Approved and Funded
            AP          Approved Pending Funds
            DD          Disapproved
            DF          Deferred until later

Select a status code: AF <RET> Approved and Funded
Quantity requested: 2                  Quantity approved: 2 // 1 <RET>

Qty: 2              Price: 400.00      Total: 800
Description:
       17 inch computer monitor

      Select one of the following:
            AF          Approved and Funded
            AP          Approved Pending Funds
            DD          Disapproved
            DF          Deferred until later

Select a status code: DD <RET>    Disapproved
Quantity requested: 2                  Quantity approved: 1// <RET>
ITEM STATUS EXPLANATION:
  1>ISN'T NEEDED AT THIS TIME <RET>
  2><RET>
EDIT Option: <RET>

Qty: 1              Price: 500.00      Total: 500
Description:
    A CD-ROM PLAYER

      Select one of the following:
            AF          Approved and Funded
            AP          Approved Pending Funds
            DD          Disapproved
            DF          Deferred until later

Select a status code: DF <RET>    Deferred until later
Quantity requested: 1                  Quantity approved: 1// <RET>
ITEM STATUS EXPLANATION:
  1>NOT ENOUGH IN CURRENT BUDGET <RET>
  2> <RET>
EDIT Option: <RET>

Splitting this request. Please wait...
NEW TRANSACTION NUMBER: 621-666-96-00002A

Splitting this request. Please wait...
NEW TRANSACTION NUMBER: 621-666-96-00002B
```

7.3.5 Step 5

Mail messages will be sent to the requestor and CMR Official based upon the final decision of the Equipment Committee.

```
Subj: REQUEST APPROVED [#69] 14 Mar 96 19:49 3 Lines
From: ETRUSER,TEN  in 'IN' basket.   Page 1
-------------------------------------------------------------------------------------

The Equipment Committee has approved Equipment Request, Transaction #: 621-782-95-00003D
pending funding. It will be purchased as soon as funding is
received.


Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored
```

```
Subj: REQUEST NOT APPROVED [#70] 14 Mar 96 19:50 3 Lines
From: ETRUSER,TEN  in 'IN' basket.   Page 1
-------------------------------------------------------------------------------------

The Equipment Committee has not approved Equipment Request,
Transaction #: 621-780-95-00001. Please cancel this request.
Explanation:


Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored
```

```
Subj: REQUEST DEFERRED [#71] 14 Mar 96 19:50 3 Lines
From: ETRUSER,TEN  in 'IN' basket.   Page 1
-------------------------------------------------------------------------------------

The Equipment Committee has deferred Equipment Request,
Transaction #: 621-323-95-00001A until a later time. Please resubmit this
request later.


Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored
```

```
Subj: REQUEST APPROVED! [#72] 14 Mar 96 19:52 2 Lines
From: ETRUSER,TEN  in 'IN' basket.   Page 1
-------------------------------------------------------------------------------------

The Equipment Committee has approved Equipment Request,
Transaction #: 621-666-96-00002 for purchase.


Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored
```

7.5 Service Priority Report
Prints requests in service priority. User has a choice of printing for all services or selecting a particular service.

7.5.1 All Services
Each service starts a new page.

```
    Select one of the following:

        O          Select One Service
        A          Select All Services

Select Print Type : A <RET>   Select All Services
DEVICE: HOME// <RET>

REQUESTS BY SERVICE PRIORITY                  May 14, 1996 10:52 am PAGE: 1

TRANSACTION #        PRIORITY            TYPE        COST    QUANTITY   TOTAL
                                       PARENT SYSTEM
     ITEM DESCRIPTION                  / COMPONENT
                                        JUSTIFICATION
-----------------------------------------------
SERVICE: ETRVENDOR , SEVEN

621-666-96-00007    2                 ADDITION
     FAX MACHINE - VENDOR PRODUCT     PARENT SYSTE   550.00     1      550.00
621-323-95-00001    4                 REPLACEM
     REFRIGERATOR                     PARENT SYSTE  3000.00     2     6000.00
Press RETURN to continue or '^' to quit. <RET>

REQUESTS BY SERVICE PRIORITY                  May 14, 1996 10:53 am PAGE: 4

TRANSACTION #        PRIORITY            TYPE        COST    QUANTITY   TOTAL
                                       PARENT SYSTEM
     ITEM DESCRIPTION                  / COMPONENT
                                        JUSTIFICATION
----------------------------------------------------------------------------
SERVICE: ETRVENDOR1 , TWO

621-123-96-00005    3                 ADDITION
     ANOTHER ITEM FOR THE             PARENT SYSTE   250.00     1      250.00
     KITCHEN
Press RETURN to continue or '^' to quit. <RET>

REQUESTS BY SERVICE PRIORITY                  May 14, 1996 10:53 am PAGE: 5

TRANSACTION #        PRIORITY            TYPE        COST    QUANTITY   TOTAL
                                       PARENT SYSTEM
     ITEM DESCRIPTION                  / COMPONENT
                                        JUSTIFICATION
----------------------------------------------------------------------------
SERVICE: ENGINEERING

621-136-96-00010    1                 ADDITION
     IBM PENTIUM 120 W/16 MB          PARENT SYSTE   300.00     2      600.00
     MEMORY, ISA CARD
     CONNER TAPE DRIVE                PARENT SYSTE   450.00     2      900.00
                                                                    --------
                                                                     8300.00
```

7.5.2 One Service
Selecting one service.

```
    Select one of the following:

        O        Select One Service
        A        Select All Services

Select Print Type : O <RET> Select One Service
Select SERVICE/SECTION NAME: ETRVENDOR1,TWO<RET>
DEVICE: HOME// <RET>

REQUESTS BY SERVICE PRIORITY                  May 14, 1996 10:53 am PAGE: 1

TRANSACTION #      PRIORITY          TYPE        COST    QUANTITY   TOTAL
                                     PARENT SYSTEM
    ITEM DESCRIPTION                / COMPONENT
                                     JUSTIFICATION
-------------------------------------------------------------------------------------


SERVICE: ETRVENDOR1,TWO

621-123-96-00005   3                ADDITION
    ANOTHER ITEM FOR THE            PARENT SYSTE   250.00     1       250.00
    KITCHEN
                                                                    -------
                                                                     250.00
```

CHAPTER 8 WAREHOUSE

The warehouse menu allows the person who as been assigned the security key, PRCNWHSE, to assign someone to pick up equipment that is being turned in. The person assigned to pick up the item(s) must check in the turned-in item, and sign that it has been turned in before the Personal Property Manager can complete the final disposition of the item being turned in.

```
There are 2 Turn-In requests to review.


        Process Equipment Turn-In Request (Warehouse)
        Display/Print Turn-In Request

Select Warehouse Tunr-In Menu Option:
```

8.1 Step 1
Assigning Someone to Pick-Up Turn-in Equipment

```
Select Option:   PROC<RET>ess Equipment Turn-In Request (Warehouse)
Select TURN-IN REQUEST TRANSACTION CODE:   ? <RET>
   ANSWER WITH TURN-IN REQUEST NUMBER, OR TRANSACTION CODE
CHOOSE FROM:
   47           621-132-96-00006   Pending Warehouse Pickup
   49           621-420-96-00028   Pending Warehouse Pickup

Select TURN-IN REQUEST TRANSACTION CODE:   49 <RET>        621-420-96-00028
   MFGR. EQUIPMENT NAME: BINDING SYSTEM
   MANUFACTURER: ETRVENDOR,FOUR
   MODEL:  750                                  SERIAL #: 76096
   NXRN #: 18329                                CATEGORY STOCK NUMBER: 3610-438983
   TOTAL ASSET VALUE: 3296.00                   ACQUISITION DATE: MAR 09,1992
   CMR: 420 SUPPLY (OFFICE)                     REPLACEMENT DATE: MAR 09, 2007
   LOCATION:
   WAREHOUSE OFFICIAL:
----------------------------------------------------------------------------------------------------
Assign turn-in # 621-420-96-00028 to whom?:   ? <RET>
   ANSWER WITH NEW PERSON NAME
   DO YOU WANT THE ENTIRE 33-ENTRY NEW PERSON LIST?:   N <RET>   (NO)
Assign turn-in # 621-420-96-00028 to whom?: ETRUSER,ONE <RET>
```

8.2 Step 2
When the person assigned to pick up the item(s) has done so, the assigned Warehouse Official must sign onto the menu option and answer that it has been picked up. He/she is also given the chance to modify the DISPOSAL CONDITION CODE if it is other than what the PPM thought it would be.

```
Select Option: PROC<RET>ess Equipment Turn-In Request (Warehouse)
Select TURN-IN REQUEST TRANSCTION CODE:   ? <RET>
    ANSWER WITH TURN-IN REQUEST NUMBER, OR TRANSACTIO N CODE
CHOOSE FROM:
    47          621-132-96-00006    Pending Warehouse Pickup
    49          621-420-96-00028    Pending Warehouse Pickup

Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>    621-420-96-00028   Pending Warehouse Pickup

    MFGR. EQUIPMENT NAME: BINDING SYSTEM
    MANUFACTURER: ETRVENDOR , FOUR
    MODEL:  750                               SERIAL #: 76096
    NXRN #: 18329                             CATEGORY STOCK NUMBER: 3610-438983
    TOTAL ASSET VALUE: 3296.00                ACQUISITION DATE: MAR 09,1992
    CMR:  420 SUPPLY (OFFICE)                 REPLACEMENT DATE: MAR 09, 2007
    LOCATION:
    WAREHOUSE OFFICIAL:  ETRUSER , ONE
------------------------------------------------------------------------------------

Is this the correct item turned in?:   Y <RET>
DISPOSAL CONDITION CODE:  Used-Fair// ? <RET>
    Choose from:
    1      Unused-Good
    2      Unused-Fair
    3      Unused-Poor
    4      Used-Good
    5      Used-Fair
    6      Used-Poor
    7      Repairs Required-15% of a/c or less
    8      Repairs Required-16%-40% of a/c
    9      Repairs Required-41%-65% of a/c
    X      Salvage
    S      Scrap
DISPOSAL CONDITION CODE: Used-Fair// X <RET>    Salvage
Hit RETURN to continue. <RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE:     CODE <RET>        Thank you.
```

8.3 Step 3

At this stage of the turn-in process, capitalized items will be handled differently from non-capitalized items. Capitalized items have sent an FA Code Sheet to FMS (Financial Management System) and must have an FD Code Sheet also sent to disposition the record in FMS. Turn-in of capitalized items also includes the updating of the general ledger in the Fixed Asset portion of FMS and the CMR must also be updated. Non-capitalized items will return to the PPM and allow the PPM to process the turn-in through the Final Disposition option. Capitalized items must wait until a FD Code Sheet is generated and a new FA Code Sheet has also been generated.

CHAPTER 9 TURN-INS

9.1 Requestor
If you wish to turn-in equipment without ordering replacement equipment, select the Process Equipment Turn-Ins menu option so that the request may go through the proper channels.

9.1.1 Enter Excess Equipment Turn-In Request

9.1.1.1 Step 1
Select the Enter Excess Equipment Turn-In Request option from the Process Turn-Ins menu. The first two entries you make establish the temporary request number for this turn-in document. If your site parameters are set up for a multi-divisional site, you will be asked to identify the Station Number, otherwise it will automatically default to your station number.

```
Select STATION NUMBER ('^' TO EXIT):621// <RET>    MOUNTAIN HOME
```

9.1.1.2 Step 2
Select the CMR Responsible Official responsible for the equipment being turned in.

```
Select CMR NAME:  420 <RET>   SUPPLY (OFFICE)   ACQUISITION & MATERIAL MGMT    ETRUSER,ONE

This Request has been assigned Transaction #:  621-420-96-00028
```

Your equipment turn-in document has now been assigned a temporary transaction number. Refer to this number during the life cycle of the request.

9.1.1.3 Step 3
You will be asked next to select the items from the Equipment Inventory (AEMS/MERS) file that you wish to turn in. After you have selected and filled in the justification for turning in this equipment, it will go to the responsible CMR Responsible Official for review and approval.

```
Select REPLACEMENT ITEM NUMBER: 76096 11077 <RET>  BINDING SYSTEM   IN USE   3610-5052
    TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
    TURN-IN LINE ITEM DESCRIPTION: BINDING SYSTEM// <RET>
CSN:   1005-000667
Description: BINDING SYSTEM
Model #:  750                             Serial #: 76096
Manufacturer:  ETRVENDOR, FOUR           Last Location:
Acquisition Value:  $3296.00             CMR: 420 SUPPLY (OFFFICE)
JUSTIFICATION:  ?
    CHOOSE FROM:
        1        Fair wear and tear
        2        Excess equipment failure/repair
        3        Upgrade
        4        State-of-art technology
        5        Replacement due to loss or damage
        6        Other
JUSTIFICATION:  2 <RET>   Excess equipment failure/repair
Select TURN-IN LINE ITEM: <RET>

Is this request ready for CMR Approval?  Y <RET> YES
```

9.1.2 Edit Excess Equipment Turn-In Document

If a turn-in document has been left incomplete, then the ability exists for you, the requestor, to make changes and even add additional items.

```
Select TURN-IN REQUEST TRANSACTION CODE:  621-420-96-00028 <RET>  Pending CMR Official Review
DEVICE: HOME// <RET>  LAN

TRANSACTION CODE: 621-420-96-00028              REQUESTOR: ETRUSER , FOUR
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: MAR 06, 1996@09:57:56        STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL:  ETRUSER , THREE
STATUS DATE: MAR 06, 1996                       CMR OFFICIAL APPROVAL:
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS: 1
    EQ. REQUEST LINE NUMBER: 345
    MFGR. EQUIPMENT NAME: BINDING SYSTEM
    MANUFACTURER: ETRVENDOR , FOUR
    MODEL: 750                                  Serial #: 76096
    NXRN #: 18329                               CATEGORY STOCK NUMBER: 3610-438983
    ACQUISITION VALUE: 3296.00                  ACQUISITION DATE: MAR 09, 1992
    CMR: 420 SUPPLY (OFFICE)                    REPLACEMENT DATE: MAR 09, 2007
    LOCATION:
    WAREHOUSE OFFICIAL:
```

9.1.3 Cancel Excess Equipment Turn-In Request

The ability to cancel an incomplete or returned turn-in document also exists.

```
Enter TRANSACTION #:  ? <RET>
    ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
    1                         621-666-95-00006   Pending Completion by Requestor

Enter TRANSACTION #:  1 <RET>    621-666-95-00006   Pending Completion by Requestor

Service:  IRM                          CMR Official:  ETRUSER, THREE
Requester:  ETRUSER, FOUR                  Date Entered: DEC 07, 1993
Line Items:
    Number:  1                         Description: CONT BARIUM FLOW XRAY
    Number:  2                         Description: COMPUTER DIGITAL

Are you sure you want to cancel this turn-in? NO// Y <RET>    (YES)
```

9.2 CMR Official

The CMR Responsible Official must review and approve Turn-In documents since they are responsible for that equipment.

```
    Enter Equipment Turn-In Request
    Edit Equipment Turn-In Request
    Cancel Turn-In Request
    Display/Print Turn-In Request
    Approve Equipment Turn-In Request (CMR)

Select Process Equipment Turn-Ins Menu Option:
```

9.2.1 Enter Equipment Turn-In Request

A CMR Responsible Official can act as a requestor for entering turn-in documents. See 9.1.2 for more information.

9.2.2 Edit Equipment Turn-In Request

See 9.1.3 for more information.

9.2.3 Cancel Turn-In Request

See 9.1.4 for more information.

9.2.4 Display/Print Turn-In Request

```
Select Turn-In TRANSACTION #: ? <RET>
 Answer with TURN-IN REQUEST NUMBER, or TRANSACTION CODE
 Do you want the entire 34-Entry TURN-IN REQUEST List? Y <RET>    (Yes)
Choose from:
   25           621-780-95-00007      Turn-in Completed
   26           621-780-95-00012      Pending PPM Final Disposition
   27           621-323-95-00002      Pending PPM Final Disposition
   28           621-323-95-00003      Pending Warehouse Pickup
   29           621-123-96-00006      Cancelled Request
   30           621-123-96-00007      Cancelled Request
   31           621-666-96-00001      Pending Warehouse Pickup
   38           621-666-96-00010      Pending PPM Review
   39           621-136-96-00002      Pending PPM Review
   49           621-780-96-00001      Pending CMR Official Review
   50           621-780-96-00002      Pending Completion by Requestor
   51           621-780-96-00003      Pending CMR Official Review
   52           621-780-96-00004      Pending CMR Official Review
   53           621-780-96-00006      Pending Completion by Requestor
   54           621-666-96-00013      Pending Completion by Requestor
   55           621-666-96-00015      Pending Completion by Requestor

Select Turn-In TRANSACTION #: 39 <RET> 621-136-96-00002        Pending PPM Review
DEVICE: HOME// <RET>


TRANSACTION CODE: 621-136-96-00002        REQUESTOR: ETRUSER, FOUR
REQUESTING SERVICE: ENGINEERING
REQUEST DATE/TIME: MAR 01, 1996@15:35:55 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER, THREE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996                 CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:


TURN-IN LINE ITEMS:
    EQ. REQUEST LINE NUMBER: 1
    ENTRY NUMBER: 51
    MFGR. EQUIPMENT NAME: HYDRAULIC LIFT BED
    MANUFACTURER:
    MODEL:                              SERIAL #:
    NXRN #:                             CATEGORY STOCK NUMBER:
    TOTAL ASSET VALUE:                  ACQUISITION DATE:
    CMR: 136                            REPLACEMENT DATE:
    LOCATION:
    JUSTIFICATION: Fair wear and tear
    OTHER JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

    DISPOSAL CONDITION CODE:
    WAREHOUSE OFFICIAL:

TOTAL REPAIR COSTS: 0
```

9.2.5 Approve Equipment Turn-In Request
The CMR Responsible Official responsible for the equipment must review and approve any turn-in documents prior to review by the Personal Property Manager. The CMR Responsible Official will be notified when a turn-in request has been generated with an alert message.

9.2.5.1 Step 1
Select the request you wish to review.

```
Select CMR Official Menu Option: APP<RET>rove Equipment Turn-In Request (CMR)

Select TURN-IN REQUEST TRANSACTION CODE:  ? <RET>
Choose from:
49  621-420-96-00028       Pending CMR Official Review

Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>    621-420-96-00028    Pending CMR Official
Review
DEVICE: HOME// <RET>  LAN
```

9.2.5.2 Step 2

The request will display on the screen.

```
TRANSACTION CODE: 621-420-96-00028          REQUESTOR:  ETRUSER , FOUR
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME:  MAR 06, 1996@09:57:56   STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER , ONE
REQUEST STATUS: Pending CMR Official Review
STATUS DATE: MAR 06, 1996

TURN-IN LINE ITEMS:
    EQ. REQUEST LINE NUMBER: 1
    MFGR. EQUIPMENT NAME: BINDING SYSTEM
    MANUFACTURER: ETRVENDOR , FOUR
    MODEL:  750                         SERIAL #:  76096
    NXRN #: 18329                       CATEGORY STOCK NUMBER: 3610-438983
    ACQUISITION VALUE: 3296.00          ACQUISITION DATE: MAR 09, 1992
    CMR: 420 SUPPLY (OFFICE)            REPLACEMENT DATE:  MAR 09, 2007
    LOCATION:
    WAREHOUSE OFFICIAL:

CMR OFFICIAL APPROVAL:  Y <RET>        YES

ENTER YOUR ELECTRONIC SIGNATURE CODE:         CODE <RET>        Thank you.
```

9.3 PPM Official

The PPM processes turn-ins in three steps; reviewing turn-in requests, reviewing completed work orders, and sending to the warehouse for pickup. PPM must first review any turn-in requests to determine if a work order must be created in order for Engineering to disconnect or otherwise remove the equipment. After Engineering has performed its' work order, the PPM needs to tell the warehouse that items(s) need to be picked-up by the warehouse. After the warehouse has picked up the item, the PPM will perform final disposition of the item.

```
Good morning GEORGE
     You last signed on today at 11:00
Select TERMINAL TYPE NAME: C-VT220// <RET>
        Digital Equipment Corporation VT-220 terminal

   There are 2 equipment requests Pending Equipment Committee Review/Rank.
   There are 14 equipment requests Approved - Funded.
   There are 3 equipment requests Ready for 2237 Processing.

   There are 2 turn-in requests Pending PPM Review.
   There are 2 turn-in requests Pending PPM Final Disposition.
   There are 2 turn-in requests Work Order Completed.


          Review Equipment Requests (PPM)
          Edit Equipment Requests (PPM)
          Cancel Equipment Requests
          Rank Equipment Requests
          Create 2237 (PPM)
          Display/Print Equipment Requests (PPM)
          Equipment Request Reports Menu ...
          Process Equipment Turn-Ins Menu ...

Select Equipment Request Menu (PPM) Option: PROC<RET>ess Equipment Turn-Ins Menu
```

9.3.1 Process Turn-In Request (Pending PPM Review)

The PPM will review the item(s) being turned in and assign a preliminary DISPOSAL CONDITION CODE and possible DISPOSITION METHOD and makes the determination if a work order is needed. If a work order is needed for a particular item for Engineering, the PPM will be prompted, 'Should a work order be generated for this line item?' for each item in the request so they can create one and forward it to Engineering. Not all items in a request may need to have a work order produced for turn-in. See Engineering User Manual on how to process a work order. When the DATE COMPLETED has been entered by Engineering, the turn-in will return to the PPM.

```
TRANSACTION CODE: 621-666-96-00006      REQUESTOR: ETRUSER , FOUR
REQUESTING SERVICE: ETRVENDOR , SEVEN
REQUEST DATE/TIME: JAN 26, 1996@10:42:46 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER , THREE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996                CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
    ENTRY NUMBER: 65
    MFGR. EQUIPMENT NAME: PENTIUM 60
    MANUFACTURER:
    MODEL:                            SERIAL #:
    NXRN #:                           CATEGORY STOCK NUMBER:
    TOTAL ASSET VALUE:                ACQUISITION DATE:
    CMR: 666                          REPLACEMENT DATE:
    LOCATION:
    JUSTIFICATION: Upgrade
    OTHER JUSTIFICATION:
    DISPOSAL CONDITION CODE:
    WAREHOUSE OFFICIAL:

DISPOSAL CONDITION CODE: ? <RET>
    Choose from:
    1       Unused-Good
    2       Unused-Fair
    3       Unused-Poor
    4       Used-Good
    5       Used-Fair
    6       Used-Poor
    7       Repairs Required-15% of a/c or less
    8       Repairs Required-16%-40% of a/c
    9       Repairs Required-41%-65% of a/c
    X       Salvage
    S       Scrap
DISPOSAL CONDITION CODE: 5 <RET>   Used-Fair

Should a work order be generated for this line item? Y <RET>    (Yes)

Does this turn-in require a work order
Enter Yes or No: YES// <RET>
Work Order #: TI960514-001
TASK DESCRIPTION (60 char): Prepare equipment for turn-in.
        Replace <RET>
CONTACT PERSON: ETRUSER , FIVE// <RET>
COMMENTS:
  1> <RET>
Want to print this new work order?
Enter Yes or No: NO// <RET>
Select TURN-IN REQUEST TRANSACTION CODE: <RET>
```

9.3.2 Process Turn-In Request (Work Order Completed)
The PPM will send the request to the Warehouse to pick up the item(s) being
turned in. See Chapter 8 Warehouse to review this step.

```
Select Process Equipment Turn-Ins Menu Option: PROC<RET>ess Equipment Turn-In Request (PPM)
Select TURN-IN REQUEST TRANSACTION CODE: ?? <RET>

Choose from:
   28            621-323-95-00003      Work Order Completed
   35            621-666-96-00006      Work Order Completed
   38            621-666-96-00010      Pending PPM Review
   39            621-136-96-00002      Pending PPM Review

Select TURN-IN REQUEST TRANSACTION CODE: 28 <RET>   621-323-95-00003       Work Order Completed
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-323-95-00003      REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: AUG 15, 1995@17:47:42 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,ONE
REQUEST STATUS: Work Order Completed
STATUS DATE: MAY 14, 1996             CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
    NEED TO REPLACE MORE THAN ONE
Is this request ready to go to Warehouse for pickup? Yes// <RET>   (Yes)
Select TURN-IN REQUEST TRANSACTION CODE: 35 <RET>   621-666-96-00006       Work Order Completed
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-666-96-00006      REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: JAN 26, 1996@10:42:46 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,THREE
REQUEST STATUS: Work Order Completed
STATUS DATE: MAY 14, 1996             CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
Is this request ready to go to Warehouse for pickup? Yes// <RET>   (Yes)
Select TURN-IN REQUEST TRANSACTION CODE: <RET>
```

9.3.3 Final Disposition of a Turn-In

After Engineering has processed the work order (if one was needed), and the Warehouse has picked up the equipment, the turn-in is sent back to the PPM for final disposition and processing of the item(s) which may include generating a FD code sheet for FMS.

```
Select TURN-IN REQUEST TRANSACTION CODE: 621-780-95-00012  <RET> Pending PPM Final Disposition
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-780-95-00012        REQUESTOR: ETRUSER,FOUR
REQUESTING SERVICE: ETRVENDOR,SEVEN
REQUEST DATE/TIME: AUG 05, 1995          STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: ETRUSER,ONE
REQUEST STATUS: Pending PPM Final Disposition
STATUS DATE: MAR 06, 1996                CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

Select REPLACEMENT ITEM NUMBER: 29// <RET>
    ENTRY NUMBER: 29
    MFGR. EQUIPMENT NAME: ETRVENDOR,S IX CONTROL MONITOR
    MANUFACTURER:
    MODEL:                              SERIAL #:
    NXRN #:                             CATEGORY STOCK NUMBER: 6110-386607
    TOTAL ASSET VALUE: 450.00           ACQUISITION DATE: JAN 01, 1984
    CMR:                                REPLACEMENT DATE:
    LOCATION:
    JUSTIFICATION: State-of-art technology
    OTHER JUSTIFICATION:
    DISPOSAL CONDITION CODE: Used-Good
    WAREHOUSE OFFICIAL: ETRUSER1,ONE

    DISPOSITION METHOD: B// <RET>
    DISPOSITION VALUE: <RET>
Select REPLACEMENT ITEM NUMBER: <RET>
Enter ELECTRONIC SIGNATURE CODE:          CODE <RET>    Thank you.
```

CHAPTER 10 GLOSSARY

2237   VA Form 2237**,** used to request goods and services.

AEMS-MERS   Name of the computer system located at each medical center to support Consolidated Memorandum of Receipts.

Application Coordinator   The individuals responsible for the implementation, training and trouble-shooting of a software package within a service. IFCAP requires that there be an Application Coordinator designated for Fiscal Service and the Control Points (Requesting Services).

Category Stock Number   A number used to identify non-expendable types of equipment.

CSN   See Category Stock Number.

Equipment Management   A section/division of A&MM Service or similar activity responsible for screening all equipment requests. They are accountable for all equipment (CMRs) at the facilities they support.

FMS   Financial Management System - System that replaced CALM.

Integrated Supply Management System (ISMS)   System in which catalog information exists. You can query for description and category stock number.

Item Master File   A data base of items specific to each A&MMS. This file maintains a full description of the item and costs, as well as other related information**,** such as stock number, vendor, contract number and a procurement history.

Item Master Number   A computer generated number used to identify an item in the Item Master file.

National Stock Number   A number used to identify expendable supply items.

NSN   See National Stock Number.

PPM/MMS	Personal Property Management/Materiel Management Service.
Purchase Order	A government document authorizing the purchase of the goods or services at the terms indicated.
Purchasing Agent	The employee authorized to place orders with vendors.
Short Description	A phrase which describes the item in the Item Master file. It is restricted to 3 to 60 characters and consists of what the item is, the kind of item and the size of item (i.e., GLOVE-SURGICAL-MED).
Subaccount/BOC	A Fiscal Code which related to financial accounting/budget information.
Tasked Job	A job, usually a printout, that has been scheduled to run at a predetermined time. Tasked jobs are set up to run automatically.
VA Form 2237	VA Form 2237, used to request goods and services.
Vendor File	An IFCAP (or FMS) file of vendors with which the facility does business. This file contains ordering and billing addresses, contract information, FPDS information and telephone numbers. File 440 contains information about the vendors that your station does business with. The debtor's address may be drawn from this file but is maintained separately. If the desired vendor is not in the file, contact A&MM Service to have it added.
Vendor ID Number	The ID number assigned to a vendor by FMS.