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NASA Procedural Requirements

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Subject: Equipment Management Manual for Property Custodians w/Change 1, 9/11/03

Responsible Office: Logistics Management Division

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Chapter 4. Operational Procedures

4.1. Initial Acquisition of Equipment.

4.1.1. When equipment is received at a Center receiving dock, receiving personnel generate the receiving document for each authorized purchase, transfer, loan, or lease acquisition, and they tag all items meeting controlled criteria.

4.1.2. When equipment is delivered directly to the purchase initiator such as in credit card purchases, the initiator must notify the Receiving Department when the equipment has been received.

4.1.3. The property custodian receives an updated NASA Form 1602 and a monthly report, "Custodian Monthly Transaction Report" (No. 020), listing all transactions processed for the custodian's account.

If equipment is received and not tagged, the recipient or the custodian must promptly notify the NEMS Equipment Manager to determine appropriate control. For Centers with full time custodians, the custodian can make the determination, tag the appropriate items, and initiate necessary documentation.

4.2. Identification of Equipment

4.2.1. The NEMS process only applies to controlled equipment, which is defined as equipment items with an acquisition cost of \$1,000 or more, and those items that will not be consumed or expended in an experiment. Selected items with an acquisition cost of \$100 or more and considered sensitive by the holding Centers will also be designated as controlled equipment. (Acquisition cost includes all "add-ons" such as internal cards and modems for personal computers.)

4.2.2. Samples of various Equipment Control Number tags are shown below to assist custodians and users in recognizing controlled versus non-controlled equipment.

4.2.3. Controlled equipment has a visible bar-coded tag affixed to the equipment. Standard bar-coded tags are black on silver aluminum.



4.2.4. If a controlled equipment item is very small, a tag is used. These tags also are black on silver aluminum.



4.2.5. Controlled equipment on loan or lease to NASA has a black-on-white bar-coded vinyl tag.



4.2.6. Non-controlled equipment is equipment (not designated as sensitive) which has an acquisition cost of less than \$1,000. This type of equipment is to be affixed with a "Property of U.S. Government" decal, NASA Form 1517 (standard size) or NASA Form 1517A (mini size), except when not physically or technologically feasible (as with optics or test models).



4.2.7 Sensitive equipment requires stringent control due to the pilferable or hazardous nature of the item. Sensitive items are identified with an "N" (Noncapital sensitive) or a "P" (Capital sensitive) in the capital/sensitive code block 4 of the NASA Form 1602. (See Appendix M, Agency Minimum Standard Sensitive Items List.)

4.2.8. Custodians are required to assign equipment items to individual users, who acknowledge receipt by signing NASA Form 1602.

4.2.9. When controllable equipment that is not tagged or equipment with a NASA bar code tag does not exist in NEMS is discovered, it must be reported on NASA Form 1618, "Found on Station Equipment Investigation." The completed form will be forwarded to the Supply and Equipment Management Officer.

4.2.10. The custodian will complete the top portion of NASA Form 1618, except for Federal Stock Number and Document Number. The equipment control number must be noted if the item has a NASA bar-code tag. An investigation must be conducted into the circumstances that allowed the equipment to be brought on-site without NEMS control, and the results must be documented in part I, section 2, of the form. (See appendix E).

4.2.11. The user will assist the custodian in completing NF 1618 and sign in the designated block.

4.2.12 The Division Director or chief will complete and sign part II of the form, providing recommendations that will prevent recurrence.

4.2.13. After the investigation and approvals are completed, NEMS Control will tag the item and update the NEMS data base (Transaction 12, Receipt From Found On Station). A NASA Form 1602 will be forwarded to the property custodian.

4.3. Standard NEMS Reports for Property Custodians.

4.3.1. Custodian Monthly Transaction Report 020. Custodians will receive this report on a monthly basis, if actions have been processed in their accounts. The 020 report describes the type of transactions processed and lists individual items involved. Custodians should review this report to ensure that all actions noted are accurate.

4.3.2. Custodian Account Property Report 140 and 141. Custodians will receive, from NEMS Control, a complete report of all controlled equipment items assigned to their accounts on a frequency determined by the individual Center policy but not less than annually. The custodian should verify the accuracy of the report through comparison with the NASA Form 1602. This report will also be provided at any time upon request by the custodian.

4.3.3. Equipment Utilization Review Report 720. NEMS Control will provide an annual report of all controlled equipment for each custodian account. The custodian must verify the report, note changes, and forward to the Property Management Office prior to the Division Director's annual walk-through inspection. Listings of all equipment within the appropriate area will also be provided to the Division Director upon request. The results of the reviews will be forwarded to the Supply and Equipment Management Officers for action.

4.3.4. See paragraph below for reports generated as a result of physical inventories.

4.3.5. The following are additional NEMS generated reports that are beneficial to custodians for tracking status of assigned equipment:

4.3.5.1. Loaned In and Loaned Out Equipment Expiration Reports, 130 and 131.

4.3.5.2. Leased In and Leased Out Equipment Return Candidate Lists, 132 and 133.

4.3.5.3. Borrowed Equipment Return Candidate List, 134.

4.3.5.4. Off-site for Repair Report, 137; and Repair Equipment Reports 196 and 197.

4.3.4.5. Idle Equipment Reports, 194 and 195.

4.4. Inventory Procedures.

Three types of inventories affect custodians and users.

4.4.1 **Cyclic Inventory**. A complete physical inventory is required at each Center at least once every 3 years, involving a total wall-to-wall, floor-to-ceiling sighting. Action will be taken on equipment that meets control criteria but is not tagged or included in NEMS. Custodians will receive a 30-day advanced notice with instructions on actions needed to expedite the inventory. Inventory personnel will proceed through the custodian's area, scanning all tagged equipment, to be later updated in NEMS. Custodians are required to cooperate with inventory personnel. Alternate methods for inventory may be used to satisfy the inventory requirements, i.e., Inventory by Exception or physical sighting.

4.4.2. Cyclic Inventory Reports and Actions.

4.4.2.1. Within 30 working days after completion of the inventory, the custodian and Division Director will receive a report of the results. Specific instructions will be provided to the custodian to resolve discrepancies. Local reporting procedures will be established for Centers that use the inventory by exception option.

4.4.2.2. The custodian will be allowed a maximum of 30 days to correct the cited discrepancies and submit survey reports, unless a written request for extension has been granted by the Supply and Equipment Management Officer. Failure of the custodian or the Division Director to respond satisfactorily will be promptly reported to the appropriate management officials.

4.4.2.3. Upon completion of all accounts within a Division, the Supply and Equipment Management Officer will provide the Division Director or chief a summary of final results for all accounts within the organization.

4.4.3. **Sensitive Inventory**. The Supply and Equipment Management Officer, at his discretion, will direct an unannounced inventory of sensitive items under accounts which have been identified with systemic problems.

4.4.4. **New Property Custodian Inventory**. When a property custodian account changes hands, the losing and the gaining custodians must **jointly** conduct a full inventory of the account, prior to acceptance by the gaining custodian. Inventory personnel may be contacted for assistance, depending on Center policy. The losing and gaining custodians must fulfill objectives as follows:

4.4.4.1. Verify that recorded equipment is still on-site.

4.4.4.2. Confirm or determine current location.

4.4.4.3. Identify unrecorded equipment that qualifies for control.

4.4.4.4. Locate or identify missing equipment. Note: If missing equipment cannot be located, it is the responsibility of the losing custodian to process the survey report.

4.4.4.5. Identify unused or broken equipment.

4.4.5. The Supply and Equipment Management Officer will determine the actions required for the transfer of accountability between custodians. Those actions may include a 100-percent inventory.

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