



U.S. Nuclear Regulatory Commission Office of Nuclear Reactor Regulation

NRR OFFICE INSTRUCTION

Change Notice

Office Instruction No.: **ADM-202, Revision 1**

Office Instruction Title: **NRR POLICY ON PROPERTY MANAGEMENT**

Effective Date: **April 4, 2005**

Primary Contacts: **John Harves** **Cynthia Dekle**
301-415-2252 **301-415-3282**
jch2@nrc.gov ced@nrc.gov

Responsible Organization: **NRR/PMAS**

Summary of Changes: Initially issued January 15, 2003, this Office Instruction provides NRR-specific guidance and procedures for the management of NRC officially-recorded ("blue-tagged") personal property. This update replaces the primary contact and makes minor changes to reflect current practice. The changes are reflected by the bars in the margin.

Training: NRR Property Custodians will attend periodic property management training conducted by the Office of Administration.

ADAMS Accession No.: ML050420162



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Position	NRR Division Directors (parallel concurrences)				
	D:DSSA:NRR	D:DIPM:NRR	D:DRIP:NRR	D:DE:NRR	D:DLPM:NRR
Name	SBlack/ MJohnson for	BBoger	DMatthews	MMayfield/ CGrimes for w/comments	LMarsh
Date	03/15/2005	03/14/2005	03/11/2005	03/24/2005	03/23/2005

Position	Primary Contact	TL:IMT:PIMB:PMAS:NR R	C:PIMB:PMAS:NRR	D:PMAS:NRR	
Name	JHarves	CDekle	AMendiola	CCarpenter/DMcCain	
Date	02/14/2005	02/14/2005	03/07/2005	04/04/2005	

OFFICIAL RECORD COPY

**NRR OFFICE INSTRUCTION
ADM-202, Revision 1**

NRR POLICY ON PROPERTY MANAGEMENT

1. POLICY

It is the policy of NRR to follow established agency procedures and guidance and for its staff to meet or exceed the requirements related to Federal government and agency wide property management.

2. OBJECTIVES

The objective of this office instruction is to identify and expand upon the provisions of Management Directive 13.1, "Property Management," and to provide office-specific guidance for the management of NRC officially-recorded ("blue-tagged") personal property.

3. BACKGROUND

As a result of the agency FY 2000 inventory and the Office of the Inspector General Audit Report OIG-01-A-10, dated June 1, 2001, the Office of Administration (ADM) initiated a number of actions to improve the accountability of NRC property. These actions were incorporated in the current Management Directive, 13.1, "Property Management," revised January 14, 2002.

4. BASIC REQUIREMENTS

- 4.1 All NRR employees and Property Custodians shall follow the requirements of Management Directive 13.1, "Property Management," and any supplemental guidance issued by the Office of Administration for the management of NRC officially-recorded personal property.
- 4.2 Property Custodians in each division are required to review and update their accounts by conducting an inventory during the first quarter of each calendar year and to certify to the Office of Administration that their accounts are accurate and complete during this quarter. The review will include all property within Property and Supply System (PASS) and will also include a verification of all custodial receipts (NRC Form 119) for "sensitive" property (as defined in Management Directive 13.1). PMAS will provide coordination and assistance to support the certification of each division property account in a timely and comprehensive manner. The certification memorandum to the Division of Contracts and Property Management, ADM, from each division's Property Custodian must include a copy to PMAS(~~see sample on page A6 of Handbook for Property Custodians~~). (This requirement may be superseded in years during which agency wide inventories are conducted, or deadlines changed, by the Office of Administration.)

- 4.3 All custodial accounts will have primary and alternate Property Custodians identified to PMAS. Any changes will be submitted on the Designation of Property Custodian form (~~Attachment 3~~ Attachment 2) or via e-mail with copy to PMAS on a timely basis. PMAS will forward changes to ADM.

5. RESPONSIBILITIES AND AUTHORITIES

NRR Executive and Leadership Teams

Continually reinforce the objectives of this office instruction to NRR managers, property custodians and their alternates, Information Technology (IT) Coordinators, and the NRR staff.

Supervisors of Property Custodians and Alternates

Acknowledge the time requirement associated with the proper maintenance of property data records and provide the necessary time and opportunity to perform property custodian duties.

Property Custodians and Alternates

1. Manage and control the property assigned to his or her property account as outlined in Management Directive and Handbook 13.1, and ~~the Handbook For Property Custodians~~ any supplemental guidance provided by the Office of Administration.
2. Coordinate the following property management activities with the Division IT Coordinator (Attachment 3):
 - Excess IT Equipment
Determine when IT equipment is no longer needed and can be removed from the Office/Division. (~~Attachment 2 – Excess IT Equipment Process~~)
 - New Employee/NSPDP Participant/Summer Hire
Acquire IT equipment for new hires in the assigned division. (~~Attachment 2 – New Employee/Intern Process~~)
 - Employee Moves
Update the Property and Supply System (PASS) accordingly when an employee changes room locations. (~~Attachment 2 – Employee Moves Process~~)
 - Rotations
Change the room location of IT equipment in PASS when an employee leaves for a rotation. (~~Attachment 2 – Rotations Process~~)
 - Resignations/Retirements

~~The Property Custodian must start~~Start the clearance process at least 10 days before separation and perform a search of PASS records to see what property is assigned to the individual. At the time of departure, reassign, transfer, or excess all property accordingly. (~~Attachment 2 - Resignation/Retirement Process~~)

● New Equipment Acquisition

~~When new items are purchased by purchase card, the Property Custodian must tag the equipment. (Attachment 2 - New Equipment Acquisition Process)~~

3. Conduct an inventory during the first quarter of each calendar year and certify to the Office of Administration that their accounts are accurate and complete during this quarter. The review will include all property within PASS and will also include a verification of all custodial receipts (NRC Form 119) for "sensitive" property, as defined in Management Directive 13.1.
4. Verify property assigned to departing employees was updated in the PASS records. Management Directive 13.1 requires that all property be addressed at least 10 workdays before departure. Within 5 workdays after departure, ensure property was either reassigned or transferred in PASS, or is properly scheduled for pickup.
5. Maintain a sign-out/sign-in Custodial Receipt Log for Sensitive Personal Property (Attachment 4) that is picked up by employees for use on a temporary basis. Review the log regularly to ensure that the property is returned to the central location in a timely manner. In general, any property to remain with an individual for more than 30 days should be assigned to that individual on a permanent basis.
6. When NRC property (e.g., laptops) is to be removed from the premises for any reason, prepare NRC Form 466, "Property Pass." It is suggested that the Property Custodian follow these procedures for issuing property passes: 1) print three copies of Form 466 - one for the Property Custodian, one for the security guard (to be given by the employee), and one to be kept with the property, 2) cite the reason the property will be removed and the expected return date, and 3) inform the property recipient that the property pass must be shown to the security guard upon his or her return to NRC. (**Note:** NRC Form 466 is not required for cell phones removed from NRC premises; however, all cell phone holders and Property Custodians are required to retain NRC Form 119 for the cell phones as they are considered "sensitive" property items.)
7. Accept or reject proposed transfers in PASS within 5 calendar days of receiving notification.
8. Instruct property holders of their responsibilities in the use and care of NRC property when it is assigned to them.

9. Attend periodic training provided by ADM.

Purchase Card Holders

When new items are purchased by purchase card, the NRR purchase card holder must tag the equipment (Attachment 5).

IT Coordinators

NRR IT Coordinators ensure the coordination of equipment moves, pickups, and exchanges with the property custodian, by e-mail, to include the tag numbers of each piece of equipment affected by these actions.

NRR Staff

All NRR staff members are responsible for following the requirements and procedures included in NRC Management Directive and Handbook 13.1, "Property Management," and this office instruction. Specifically, NRR staff have the responsibility to:

- properly care for, protect, and conserve NRC property assigned to them;
- use NRC property for officially approved purposes only;
- promptly report the loss, damage, theft, destruction, or removal of property from its assigned location;
- account for all property listed on receiving documents before acceptance and provide copies of the documents to the property custodian; and,
- sign NRC Form 119 before receiving custody of sensitive property.

6. PERFORMANCE MEASURES

~~Performance Measures for this office instruction are not recommended at this time until more experience is gained.~~ All property accounts should be certified annually, either by the account certification process, by the inventory process, or by whatever means is established by the Office of Administration.

7. PRIMARY CONTACT

John Harves	Cynthia Dekle
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jch2@nrc.gov	ced@nrc.gov

8. RESPONSIBLE ORGANIZATION

PIMB/PMAS/NRR

9. EFFECTIVE DATE

April 4, 2005

10. REFERENCES

- Office Instruction ADM-100, "Preparing and Maintaining NRR Office Instructions."
- Management Directive and Handbook 13.1, "Property Management."
- Office of Administration, "Handbook for Property Custodians."
- NRR IT Support Website

Attachments:

1. Change History
2. Designation of Property Custodian Form
3. Property Management Processes
4. Custodial Receipt Log for Sensitive Personal Property
5. New Equipment Acquisitions

DESIGNATION OF PROPERTY CUSTODIAN FORM

DATE _____

TO: Chief, Property and Acquisition Oversight Branch, ADM

The following Property Management positions are designated in accordance with the current Management Directive and Handbook, 13.1, "Property Management," dated 1/14/02.

OFFICE TELEPHONE MAILSTOP	PROPERTY ACCOUNT	PROPERTY OFFICER
_____	_____	Primary Custodian
_____	_____	Alternate Custodian (If Required)
_____	_____	Director Designee (The Director Designee may certify requisitions for furniture, equipment, special purchases and services.)

Approval (Office or Division Director)

_____ Signature

_____ Title

_____ Date

Note: An individual may not be appointed as both Custodian (Primary or Alternate) and Director Designee.

cc: PMAS Director
PIMB Branch Chief

PROPERTY MANAGEMENT PROCESSES

EXCESS IT EQUIPMENT

A. Process Description

- How / Why Process Initiated
 - User submits request (via IT Website, email, phone call) to Customer Support Center (CSC) to remove unused IT equipment, *or*
 - User submits request (via IT Website, email, phone call) to the Division IT Coordinator to remove unused IT equipment, *or*
 - User submits request (via IT Website, email, phone call) to the Office IT Coordinator to remove unused IT equipment, *or*
 - **Note:** use of the NRR IT website is the recommended approach. The website will automatically generate emails to the Division IT Coordinator, Office IT Coordinator, and Division Property Custodian regarding the request,
 - Office of Information Services (OIS; formerly the Office of the Chief Information Officer) refresh activities result in the need to remove old equipment

- Step-by-Step Procedures for Excessing IT Equipment
 - Contact CSC (via email or phone) and request equipment removal
 - CSC generates ticket to have equipment removed and delivered to room O-2A1
 - Once equipment is delivered to O-2A1, OIS contractor notifies (via email) the assigned Property Custodian to transfer property account information from their Division to OIS property account (via PASS)
 - OIS staff prepares NRC Form 30 to have Warehouse personnel remove/deliver equipment from O-2A1 location to the Warehouse
 - After equipment is delivered to Warehouse, ADM personnel transfer property information from OIS property account to ADM property account
 - **Note:** equipment is donated to schools and other non-profit organizations
 - Once donated, ADM personnel delete the property account information for the donated equipment in PASS system

B. Property Custodian Actions/Tasks

- PASS System Actions
 - Property Custodian should be aware of requests submitted to excess IT equipment
 - **Note:** notification should come in form of email notice - no immediate action required
 - OIS contractor notifies (via email) assigned Property Custodian to transfer property account information from their Division property account to OIS property account within three (3) days
 - ~~**Note:** If property information is not transferred by the assigned Property Custodian within the three day time frame, ADM will perform the action.~~

- Follow-up Actions

None

Attachment 3

NEW EMPLOYEE/INTERN

A. Process Description

- How / Why Process Initiated
 - NRR hires new employee/intern and submits request (via IT Website, email, phone call) to Customer Support Center for IT equipment, *or*
 - NRR hires new employee/intern and submits request (via IT Website, email, phone call) to the Division IT Coordinator for IT equipment, *or*
 - NRR hires new employee/intern and submits request (via IT Website, email, phone call) to the Office IT Coordinator for IT equipment
 - **Note:** use of the NRR IT Support web site is the recommended approach. The website will automatically generate emails to the Division IT Coordinator, Office IT Coordinator, and Division Property Custodian regarding the request

- Step-by-Step Procedures for New Employee/Intern
 - Division IT Coordinator contacts Office IT Coordinator (via email or phone) regarding arrival date for new employee/intern

B. Property Custodian Actions/Tasks

- PASS System Actions
 - Property Custodian should be aware of requests submitted for new employee/intern
 - **Note:** Notification should be via email notice - no immediate action required
 - **Note:** Under the Seat Management Contract, most of the new computers are not entered into PASS. Instead, they are tracked by the Seat Management contractor using a non-NRC (i.e., L3/EER) tag.

- Follow-up Actions
 - None

EMPLOYEE MOVES (IT Equipment)

A. Process Description

- How / Why Process Initiated
 - Employee moves to another room location and submits request via IT Website to Office IT Coordinator to have IT equipment moved, *or*
 - Office realignments and requests are submitted (via IT Website) to the Office IT Coordinator to have IT equipment moved

- Step-by-Step Procedures for Employee Moves
 - Office IT Coordinator receives move request (via IT Website)
 - Office IT Coordinator forwards move request to the Customer Support Center (CSC)
 - CSC generates ticket to move IT Equipment
 - CSC forwards copy of move ticket to Office IT Coordinator and requester
 - Office IT Coordinator notifies Property Custodian and Division IT Coordinator (via email) that the move request has been processed

B. Property Custodian Actions/Tasks

- PASS System Actions
 - Property Custodian should be aware of requests submitted for all staff moves
 - **Note:** Notification should be via email notice - no immediate action required
 - Property Custodian receives notification from OIS to update property information in PASS with new office location of moved equipment
 - Property Custodian updates property information in PASS with new office location for moved equipment.

- Follow-up Actions
 - None

ROTATIONS

A. Process Description

- How / Why Process Initiated
 - Employee “temporarily” transfers to another office for a rotational assignment

- Step-by-Step Procedures for Rotations
 - Division IT Coordinator notifies Office IT Coordinator (via email) regarding rotational assignment
 - Office IT Coordinator receives move request (via IT Website)
 - Office IT Coordinator forwards move request to the Customer Support Center (CSC)
 - CSC generates ticket to move IT Equipment
 - CSC forwards copy of move ticket to Office IT Coordinator and requester
 - Office IT Coordinator notifies Property Custodian and Division IT Coordinator (via email) move request has been processed

B. Property Custodian Actions/Tasks

- PASS System Actions
 - Property Custodian of sending office updates the room location

- Follow-up Actions
 - When the rotation ends, the Division IT Coordinator notifies the Property Custodian. Property custodian updates the room location in PASS

RESIGNATIONS/RETIREMENTS

A. Process Description

- How / Why Process Initiated
 - Employee retires/resigns from agency and Division IT Coordinator notifies (via email) Office IT Coordinator

- Step-by-Step Procedures for Resignations/Retirements
 - Division IT Coordinator notifies Office IT Coordinator (via email) regarding employee retirement/resignation
 - Office IT Coordinator notifies Property Custodian (via email) regarding employee resignation/retirement

B. Property Custodian Actions/Tasks

- PASS System Actions
 - Employee starts clearance process at least ten days before separation by notifying Property Custodian. Property Custodian checks with employee if not notified
 - Property Custodian performs search in PASS to identify property assigned to employee
 - If equipment is found in PASS, Property Custodian transfers equipment to another individual within the property account, or transfers property to self, or submits request to Division IT Coordinator to have equipment picked up (excessed)
 - After transfer is complete, Property Custodian sends email to ADM requesting clearance
 - **Note:** If sensitive items are transferred, Property Custodian will need to send a new Form 119 to Property Management, m/s O-2G11
 - Sign block 1.f of Separation Clearance Form only after clearance has been received from ADM.

- Follow-up Actions
 - A NRC Form 395, "Report of Property Survey" must be submitted to ADM if item(s) cannot be accounted for before the employee separates. The Property Custodian must have received the decision on any NRC Form 395 submitted for sensitive property before signing block 1.f of the Separation Clearance Form.

Custodial Receipt Log for Sensitive Personal Property

Tag Number	Serial Number	Model Number	Property Issued To <i>(original custodian)</i>	
Description			Location <i>(Building and Room)</i>	
Manufacturer			Property Account	Acquisition cost
Purchase Order Number	Signature <i>(Same as person issued property above)</i>		Date	

Temporary Transfer of Custody

Property Issued To	Signature of Person Accepting Temporary Custody	Date Out	Date In	Original Custodian's Signature

The NRC Property identified requires unit accountability. The signer accepting temporary custody has a positive duty to protect and conserve Government property issued to him/her (10CFR 0.735-43, "Use of Government Property" and NRC Management Directive 13.1, "Personal Property Management.") The signer will be relieved of accountability by surrendering the item to the original custodian of this equipment identified at the top of this form as indicated by his/her signature.

NEW EQUIPMENT ACQUISITIONS

A. Process Description

- How / Why Process Initiated
 - ~~Office IT Coordinator receives~~ User submits new purchase request, usually via IT Website. The user needs to provide an appropriate justification for the request

- Step-by-Step Procedures for Purchases
 - Request submitted (via IT Website) to Division IT Coordinator for approval
 - Once approved, request forwarded to Office IT Coordinator for approvals and purchase through NRR/PMAS/PIMB, either by purchase card or requisition
 - Once item(s) arrives, NRR/PMAS/PIMB purchaser must tag purchased item (~~hardware or sensitive equipment only~~) in accordance with Management Directive 13.1
 - Purchaser enters tag information on tag assignment sheet
 - Purchaser forwards tag assignment sheet to ADM
 - Purchaser enters tag information on the Purchase Card Log sheet and provides copy to Property Custodian
 - **Note:** An NRC Form 119 must accompany tagging sheet if tagged item is sensitive
 - Purchaser fills out Form 119
 - Purchaser notifies (via email) requester and Property Custodian that sensitive equipment has arrived for pick-up
 - Requester and Property Custodian both sign Form 119
 - Purchaser sends (via NRC mail) Form 119 to ADM/~~DCPM~~ for entry into PASS
 - Purchaser contacts requester to pick up new purchased item
 - Requester requests installation of new item (via IT Website)

B. Property Custodian Actions/Tasks

- PASS System Actions
 - ~~Upon receipt of purchase information from the purchaser, the Property Custodian enters property information (requester name, tag number, location) in PASS for purchased item~~ None

- Follow-up Actions
 - ~~None~~Property Custodian confirms entry into PASS