

ADS 547 - Property Management of Information Technology (IT) Resources

Table of Contents

<u>547.1</u>	<u>Authority</u>	<u>3</u>
<u>547.2</u>	<u>Objective</u>	<u>3</u>
<u>547.3</u>	<u>Responsibility</u>	<u>3</u>
<u>547.4</u>	<u>Definitions</u>	<u>4</u>
<u>547.5</u>	<u>POLICY</u>	<u>4</u>
<u>547.5.1</u>	<u>PROPERTY MANAGEMENT OF INFORMATION TECHNOLOGY (IT) RESOURCES</u>	<u>4</u>
<u>E547.5.1</u>	<u>Property Management of INFORMATION TECHNOLOGY (IT) Resources</u>	<u>4</u>
<u>547.5.1a</u>	<u>INVENTORY OF IT RESOURCES</u>	<u>4</u>
<u>E547.5.1a</u>	<u>Inventory of IT Resources</u>	<u>5</u>
<u>547.5.1b</u>	<u>ROLE OF INFORMATION TECHNOLOGY (IT) SPECIALISTS AND EXECUTIVE OFFICERS (EXOs)</u>	<u>7</u>
<u>E547.5.1b</u>	<u>Role of Information Technology (IT) Specialists and Executive Officers (EXOs)</u>	<u>7</u>
<u>547.5.1c</u>	<u>ROLE OF ADMINISTRATIVE MANAGEMENT STAFFS (AMSs)</u>	<u>7</u>
<u>E547.5.1c</u>	<u>Role of Administrative Management Staffs (AMSs)</u>	<u>8</u>
<u>547.5.1d</u>	<u>INVENTORY OF IT RESOURCES USED BY CONTRACTORS AND GRANTEES IN USAID/W AND OVERSEAS LOCATIONS</u>	<u>8</u>
<u>E547.5.1d</u>	<u>Inventory of IT Resources Used by Contractors and Grantees in USAID/W and Overseas Locations</u>	<u>8</u>
<u>547.5.2</u>	<u>SAFEGUARDING IT RESOURCES</u>	<u>10</u>
<u>E547.5.2</u>	<u>Safeguarding IT Resources</u>	<u>10</u>
<u>547.5.3</u>	<u>OE-FUNDED PROPERTY</u>	<u>11</u>
<u>E547.5.3</u>	<u>OE-Funded Property</u>	<u>12</u>
<u>547.5.4</u>	<u>PURCHASE CREDITS</u>	<u>12</u>
<u>E547.5.4</u>	<u>Purchase Credits</u>	<u>12</u>
<u>547.5.5</u>	<u>LEASED OR LOANED COMMERCIAL PROPERTY</u>	<u>12</u>
<u>E547.5.5</u>	<u>Leased or Loaned Commercial Property</u>	<u>12</u>
<u>547.5.6</u>	<u>RECEIVING AGENTS</u>	<u>13</u>
<u>E547.5.6</u>	<u>Receiving Agents</u>	<u>13</u>

<u>547.5.7</u>	<u>RECEIPT AND INSPECTION OF IT RESOURCES</u>	<u>13</u>
<u>E547.5.7</u>	<u>Receipt and Inspection of IT Resources</u>	<u>14</u>
<u>547.5.8</u>	<u>IT TRANSFER</u>	<u>14</u>
<u>E547.5.8</u>	<u>IT Transfer</u>	<u>15</u>
<u>547.5.9</u>	<u>HARDWARE/SOFTWARE MAINTENANCE</u>	<u>15</u>
<u>E547.5.9</u>	<u>Hardware/Software Maintenance</u>	<u>15</u>
<u>547.5.10</u>	<u>DISPOSITION/REDISPOSITION OF IT RESOURCES</u>	<u>17</u>
<u>E547.5.10</u>	<u>Disposition/Redisposition Of IT Resources</u>	<u>17</u>
<u>547.5.11</u>	<u>EXCESS CAPITAL PROPERTY</u>	<u>17</u>
<u>E547.5.11</u>	<u>Excess Capitalized Property</u>	<u>17</u>
<u>547.6</u>	<u>Supplementary Reference</u>	<u>17</u>
<u>547.7</u>	<u>Mandatory Reference</u>	<u>17</u>

Functional Series 500: Management Services
ADS Chapter 547 - Property Management of Information Technology (IT)
Resources

547.1 Authority

1. [22 U.S.C. 2656](#) and 2258
2. Federal Property Management and Administrative Services Act of 1949, as Amended
3. [31 U.S.C. 35](#)
4. The Clinger-Cohen Act of 1996
5. [Federal Acquisition Regulation \(FAR\), Part 1, Sub-part 1.3](#)
6. [6 FAM 224.1-4](#) and [224.1-5](#)

547.2 Objective

To provide the framework for worldwide property management of Agency [Information Technology \(IT\)](#) Resources.

547.3 Responsibility

1. The Director, Office of Information Resources Management (M/IRM/OD), is the responsible USAID/Washington (USAID/W) [Property Management Officer \(PMO\)](#) for Information Technology (IT) resources. The PMO is authorized to delegate to other officers (preferably members of the same staff) responsibility for the various other property management functions as the [Accountable Property Officer \(APO\)](#) and [Property Disposal Officer \(PDO\)](#).
2. Accountable Property Officer (APO):
 - a) The Deputy Director of M/IRM is the [Accountable Property Officer \(APO\)](#) for USAID/W IT resources. The APO is responsible for budgeting, accountability, receipt, storage, issuance, recordkeeping, inventory, reporting, and certification of all IT resources records and reports within the accountable area.
 - b) In overseas locations, the Executive Officer (EXO) or Agency principal officer (if no EXO is assigned) is the Property Management Officer (PMO) for IT resources including leased IT resources.
3. The head of each Agency organization is responsible for appointing a [property custodian](#) with accountability for all computer hardware and software under the organization's control.

4. The Bureau for Management, Office of Information Resources Management (M/IRM) is responsible for managing the maintenance of all USAID/W Operating Expense (OE) IT resources. M/IRM's Chief of the Planning, Management and Acquisition Division (M/IRM/PMA) is the Property Disposal Officer (PDO) and is generally responsible for functions involving disposal of Automated Data Processing Equipment (ADPE) personal property.

5. Agency employees are responsible for the proper custody, care, and effective utilization of IT resources issued for individual use.

547.4 Definitions (See [ADS GLOSSARY](#))

AGENCY ORGANIZATIONS
ACCOUNTABLE PROPERTY
ACCOUNTABLE PROPERTY OFFICER (APO)
CAPITALIZED PROPERTY
COMMERCIAL PROPERTY
EXCESS PROPERTY
INFORMATION TECHNOLOGY (IT)
PROPERTY CUSTODIAN
PROPERTY DISPOSAL OFFICER (PDO)
PROPERTY MANAGEMENT OFFICER (PMO)
PROPERTY SURVEY BOARD
WORLDWIDE MAINTENANCE PROGRAM

547.5 POLICY

The following are the official Agency policies and corresponding essential procedures:

547.5.1 PROPERTY MANAGEMENT OF INFORMATION TECHNOLOGY (IT) RESOURCES

USAID employees Agency-wide shall ensure that IT resources, including [commercial property](#) leased or loaned to USAID, are consistently used in accordance with the Clinger-Cohen Act of 1996, other Federal laws and regulations cited in this chapter and the policies and essential procedures cited in this chapter and ensure that they are safeguarded against waste, loss, and misuse.

E547.5.1 Property Management of INFORMATION TECHNOLOGY (IT) Resources - N/A

547.5.1a INVENTORY OF IT RESOURCES

USAID organizations Agency-wide shall maintain an up-to-date inventory of IT resources under the organizations' direct control. Inventory changes (receipt of additional resources, internal transfers, or disposition) shall be reported to the Bureau for Management, Office of Information Resources Management (M/IRM) immediately.

E547.5.1a Inventory of IT Resources

Information Technology (IT) Specialists in USAID/Washington (USAID/W) and Executive Officers (EXOs) overseas must maintain an accurate inventory of IT resources. Physical inventories must be reported to M/IRM once annually during the normal inventory cycle.

Bar coding of accountable software must be recorded in a binder containing a page for each accountable software license.

In no event are overseas missions to abrogate copyright licenses for software items. The following accountable standards apply only to USAID software in the custody of overseas missions.

- 1) Pre-loaded software: Operating systems and software suites which come pre-loaded on equipment shall be entered on inventory only when they are priced separately from the equipment they reside on and when that price is over \$100. Non-priced, pre-loaded software, and any pre-loaded software priced at less than \$100 shall be treated as expendable property.**
- 2) Stand-alone packages: Once issued, stand-alone software packages shall be recorded in inventory only if the value exceeds \$100.**
- 3) Site Licenses: Site- and concurrent user- licenses shall be purchased by a work unit for permission to use software by a group, e.g., USAID worldwide, or users in a particular mission. Licenses shall be recorded on inventory, either in USAID/W or at post, but not at both locations. M/IRM shall record agency-wide licenses in Washington. Missions shall record on inventory only those site licenses purchased on the mission's behalf, for use in that particular mission, and only when such site license has a cost of \$100 or greater.**
- 4) Upgrades: When stand-alone packages and site licenses are upgraded, the superseded version must be deleted from inventory by abandonment, and the upgraded license must be entered in its place with a receiving report whenever such license has a cost of \$100 or greater.**

5) **Internally developed software:** Missions that develop individual, non-copyrighted software shall not normally enter that property in inventory unless property rights are of concern to the developing mission and development costs are substantial.

6) **Capitalized software:** In the unlikely event that a mission has procured a site license or stand-alone software valued at the capitalization threshold of \$25,000 or higher, that software shall be reported as [capitalized property](#).

When IT software is sold or transferred to non-government organizations, the original documentation and media disks for the software must accompany any software that is transferred, reassigned, or sold. Proper license transfer documentation must also be executed with the software manufacturer.

IT software that is not reassigned, transferred, exchanged, or sold in accordance with licensing agreements must either be returned to the licensor or destroyed after the Disposition Officer determines in writing that destruction is the most cost-effective disposal approach. The Disposition Officer must ensure that property records are updated to reflect the manner of disposition.

M/IRM maintains an inventory of long-distance calling cards assigned to USAID/W staff. Administrative Management Staffs (AMSS) in each Agency organization must routinely review inventory records against current requirements.

Inventory Shortage: If an inventory shortage is identified, the Bureau for Management, Office of Information Resources Management, Planning, Management and Acquisition Division (M/IRM/PMA) must review the inventories of other [Agency organizations](#) to see if the IT resource appears on the organizations' inventory reports. If IT resources are not located, they must be treated as lost or stolen. The IT Specialist/EXO must prepare Form OF-132, Property Disposal Authorization and Survey Report, and send it to the M/IRM Director.

Inventory Overage: If an inventory overage is found, M/IRM/PMA must review the inventories of other organizations to see if the equipment is there. If the equipment is still determined an overage, M/IRM/PMA must prepare a Receiving and Inspection Report, Form OF-127, for the file giving a full explanation of all known circumstances involved and stating that the overage is the result of the physical inventory. The inventory shall be adjusted accordingly

and the Bureau for Management, Office of Financial Management (M/FM) notified of any situation affecting capitalized property.

547.5.1b ROLE OF INFORMATION TECHNOLOGY (IT) SPECIALISTS AND EXECUTIVE OFFICERS (EXOs)

IT Specialists in USAID/W and EXOs overseas shall perform annual, physical inventories to ensure accuracy of IT resource records.

E547.5.1b Role of Information Technology (IT) Specialists and Executive Officers (EXOs)

M/IRM must provide each IT Specialist in USAID/W and EXO overseas an inventory listing annually by Electronic Mail (E-Mail) to compare against the physical inventory. The IT Specialist/Systems Manager must note incorrect information, or equipment that is not recorded on inventory records, and equipment listed that cannot be located. After a thorough and accurate physical inventory has been completed, the updated inventory listing must be electronically transferred to the Computer Equipment Analyst in M/IRM/PMA. Once the inventory results are received by the Computer Equipment Analyst, the updated inventory listing must be entered into the Automated Inventory Management System (AIMS).

The designated IT Specialist in USAID/W and the EXO overseas must notify the Computer Equipment Analyst in M/IRM/PMA, when property is removed at lease termination so that property records are updated.

The designated IT Specialist in USAID/W and the EXO overseas must also ensure that a physical inventory of leased IT resources is conducted once annually during the normal inventory cycle. This must occur in conjunction with the annual reporting cycle when missions are advised by the Bureau for Management, Office of Administrative Services, Overseas Management Support Staff (M/AS/OMS). The physical inventory results in USAID/W must be reconciled with M/IRM's IT resources property records and the results promptly forwarded to the Computer Equipment Analyst in M/IRM/PMA by inter-office mail, fax, or E-Mail.

547.5.1c ROLE OF ADMINISTRATIVE MANAGEMENT STAFFS (AMSs)

AMSs in USAID/W shall periodically review their respective organization's telephone inventory against current telephone requirements. (See also ADS 549, Telecommunications Management).

E547.5.1c Role of Administrative Management Staffs (AMSs)

AMSs in USAID/W must periodically review their organizations' telephone inventory against current telephone requirements. The telephone inventory must also include telephone lines for fax machines and modems.

AMSs in USAID/W must update employees' records regarding telephone inventory and directory data contained in the Personnel Locator System. This includes moves, reassignments, and new and terminated employees. Inventory changes for telephone lines not assigned to an individual (e.g., modem lines on computer servers, fax machines) must be reported to M/IRM. Normal inventory data must include the telephone user's name, organization, location of the telephone, phone number, and type of telephone/fax/modem. The inventory must reflect the actual telephone number, not the directory number.

AMSs in USAID/W are authorized to request calling cards for assigned employees. Such employees are accountable for all calls made against the card. AMSs must notify M/IRM immediately if the long-distance calling card is no longer needed by the employee, is lost, stolen, or the card number has been compromised, so that the card is promptly canceled.

547.5.1d INVENTORY OF IT RESOURCES USED BY CONTRACTORS AND GRANTEES IN USAID/W AND OVERSEAS LOCATIONS

Contractors shall maintain accountable property records of IT resources which identify each accountable item of U.S. Government-funded property acquired or furnished under the contract in accordance with guidance provided by Contracting Officers.

E547.5.1d Inventory of IT Resources Used by Contractors and Grantees in USAID/W and Overseas Locations

The following shall apply to both OE-funded contractors and Program-funded contractors where the title of IT resources either reverts to the Agency at the end of the contract, title remains with the Agency, or where title is with the contractor or host government.

- 1) Contractors must acquire access to and use of IT resources (Agency-titled, host government-titled, or contractor-titled property). Following are the most common means:**

- a. Purchase by contractor using contract funds;
- b. Transfer of existing program-funded or Operating Expense (OE)-funded property titled to the Agency or the host country government from the Agency;
- c. Transfer from the Agency property acquired by the Agency for the contractor using Agency funds; and
- d. Transfer from other sources, i.e., other U.S. Government-funded program activities or other U.S. Government agencies.

2) Contractors shall maintain accountable property records for IT resources which identify each accountable item of U.S. Government-funded property acquired or furnished under the contract in accordance with guidance provided by the contracting officer who must provide a copy of the records to M/IRM.

3) Contractors shall promptly notify both the Project Officer and Contracting Officer who must notify M/IRM, when Agency-titled IT resources are lost, stolen, destroyed, or damaged beyond economical repair.

4) Contractors shall contact the contracting officer who must notify M/IRM in writing at the end of the contract or when IT resources revert to the government so that inventories are adjusted.

5) At contract completion, the Contracting Officer must:

- a. Ensure receipt of the contractor's final inventory schedules;
- b. Consult with the appropriate Technical Officer regarding further project use prior to disposition of property; and
- c. Provide final inventory of IT resources to M/IRM for disposition instructions.

When M/IRM has advised the Contracting Officer, that official must forward disposition instructions to the contractor and take necessary follow-up action until the contractor reports that disposition has been completed.

6) The Mission Controller, in conjunction with the Property Management Officer (PMO), must ensure that contractors and grantees maintain adequate inventory records for Agency-owned property.

EXOs must notify M/IRM of changes in central fax or telephone number for inclusion in the Agency's Electronic Telephone Directory.

547.5.2 SAFEGUARDING IT RESOURCES

Agency employees must take proper care of individually assigned IT resources and ensure that such resources are utilized effectively. Employees shall be held financially liable for all individually assigned property that is damaged or destroyed as a result of negligence, improper use, or willful action.

Agency employees shall be liable for the proper management of assigned IT resources under their control.

E547.5.2 Safeguarding IT Resources

When IT property is discovered damaged, missing, or stolen, the employee's supervisor must be immediately notified. USAID/W employees must notify the M/IRM IT Specialist and AMS Officer for their organization. The AMS Officer and the Bureau for Management, Office of Administrative Services, Consolidation Property and Services Division (M/AS/CPD) must conduct an evaluation and coordinate investigative procedures with the Office of the Inspector General (IG).

Overseas employees must notify the Accountable Property Officer (APO) and the System Manager. When IT property is damaged, missing, or stolen, the following procedures must be followed at all times:

a) Employees must fill out Form OF-132, Property Disposal Authorization and Survey Report, and submit the form through the AMS Officer in USAID/W or the System Manager at overseas locations, with a copy to the M/IRM Director. M/IRM must complete the form and send it to the Director, Bureau for Management, Office of Administrative Services (M/AS/OD). The report must be filed within 15 days after discovery of missing or stolen property. The report must include complete details of the incident, a description of the equipment, serial

numbers, and the name and telephone number of the person reporting the incident.

b) In USAID/W, M/AS/CPD must provide written notification to the Director, Bureau for Management, Office of Information Resources Management (M/IRM/OD), on the outcome of the evaluation, investigation, and final determination. Findings and recommendations of the M/AS Property Survey Board shall serve to:

1. Relieve the accountable officer of accountability for the property;
2. Establish whether employees are personally liable for damaged or missing property; and
3. Recommend corrective action for any disclosed internal control weakness.

c) If M/AS/CPD is unable to locate the USAID/W IT property after investigation, M/IRM shall reflect the resource as stolen in inventory records and remove the equipment from maintenance.

d) In cases involving employee liability, the Agency's property management regulations shall apply. If the Property Survey Board determines loss or damage resulted from carelessness, negligence, or other employee misconduct, that employee shall be required to pay the cost of repair or replacement of the property.

e) For capitalized property determined to be lost, stolen, or destroyed, M/IRM shall send a copy of the final Form OF-132, Property Disposal Authorization and Survey Report, to M/FM for adjustment to the general ledger.

547.5.3 OE-FUNDED PROPERTY

IT resources funded from different accounts (OE or Program) are not to be commingled, except on an occasional, unplanned basis--for example:

- a) IT resources funded from one account are not to be used by personnel funded from another account;
- b) IT resources purchased from one account are not to be intermixed with IT resources from another account. This

precludes installing program-funded software on OE-funded equipment; and

c) Where interconnections are required between IT resources funded from different accounts, the cost of the interconnection must be funded from the account having the primary requirement for the interconnection (OE or Program).

E547.5.3 OE-Funded Property - N/A

547.5.4 PURCHASE CREDITS

M/IRM shall monitor accrual of purchase credits and recommend exercise of purchase options when an assessment of the government's equity, condition of property, and continuing requirement for the property indicate that purchase is in the best interest of the Agency.

E547.5.4 Purchase Credits - N/A

547.5.5 LEASED OR LOANED COMMERCIAL PROPERTY

IT resources shall be leased or loaned to the Agency in Washington and overseas only after M/IRM has reviewed the requirements and compared the need to available Agency resources or those of other agencies. The loan of IT resources to the U.S. Government is not specifically prohibited by law, but is generally contrary to public policy.

When it is administratively determined that the loan is clearly in the interest of the U.S. Government, the loan must be approved by M/IRM and formalized setting forth responsibilities of the government and the lender.

E547.5.5 Leased or Loaned Commercial Property

M/IRM must review Agency requirements for leased or loaned IT resources and compare the need to available Agency resources or those of other agencies. If M/IRM determines that requirements cannot be met internally or more cost-effectively through acquisition, the property shall be leased or loaned.

IT resources leased or loaned to USAID must be accounted for and controlled by standards applicable to USAID-owned property. M/IRM/PMA must maintain a file for each item of leased, Agency IT resources. The file must be annotated to indicate the date of acquisition or effective date of the lease, and termination date.

In USAID/W, employees requesting the loan of IT resources must contact the Bureau for Management, Office of Information Resources

Management, Telecommunications/Computer Operations Division (M/IRM/TCO). M/IRM/TCO must authorize the temporary loan of available IT resources to employees for performance of official business. Upon receipt of the property from M/IRM/TCO, the employee directly accountable for the item(s) must sign a completed Form OF-130, Personal Custody Property Receipt. The signed original must be maintained by M/IRM/TCO.

Form OF-130 must be canceled and returned to the employee upon surrender of loaned property in satisfactory condition. The AMS, or M/IRM, must issue a Form OF 5-7, USAID Property Pass, as required, to the employee to authorize removal of loaned property from an Agency-occupied building. The loan of IT equipment must not exceed 90 days. If a loan extension is requested, the same approval process is required.

547.5.6 RECEIVING AGENTS

In USAID/W and overseas locations, both the IT Specialist and Systems Manager, when so designated in writing by M/IRM as Receiving Agents, are authorized to receive shipment of IT resources. Overseas organizations shall follow the Agency's standard mission property management regulations for IT resources.

E547.5.6 Receiving Agents

Each Agency organization must submit to M/IRM, in writing, the names of primary and alternate receiving officials for IT resources.

Employees responsible for authorizing payment in both USAID/W and overseas must NOT serve as Receiving Agents.

Overseas Systems Managers usually serve as the alternate receiving official and must assist the Receiving Clerk in the receipt and inspection of all OE-funded IT equipment (and Agency-funded project equipment as needed). Receiving Agents in USAID/W must notify the Acquisition Manager in M/IRM of any problems with the condition of shipments received. Receiving Clerks at overseas locations must notify the EXO, Deputy EXO, General Service Officer (GSO) and the procurement section of discrepancies in receipt and inspection of IT shipments. The Acquisition Manager in M/IRM must be notified of any problems with the shipment.

In USAID/W, orders for IT equipment processed through M/IRM, must list only authorized receiving officials. The delivery date and copy of the procurement document must be forwarded to the appropriate M/IRM receiving official.

547.5.7 RECEIPT AND INSPECTION OF IT RESOURCES

Each Agency organization must apply property management principles specified in this chapter to OE-funded and Program-funded contractor IT resources.

E547.5.7 Receipt and Inspection of IT Resources

Upon receipt, the USAID/W receiving official must immediately inspect IT property and compare shipment with the procurement documents and packing lists to ensure that acquisitions are in accordance with condition, quality, and quantity. If the receiving official determines the order to be acceptable, the receiving official must clearly sign a full signature, date the packing slip, and submit it, at the time of receipt and inspection, to M/IRM.

If there is a problem when inspecting IT resources, such as damaged equipment, discrepancies, or partial deliveries, the receiving official must note on the packing slip any variation in quantity or condition of goods received and immediately notify the Acquisition Manager in M/IRM/PMA who must determine proper action to be taken.

The Computer Equipment Analyst in M/IRM/PMA must enter the IT property into the inventory system. The receiving official must make a copy of the packing slip to retain for the official record and forward the signed packing slip by fax or interoffice mail to the Computer Equipment Analyst in M/IRM.

For equipment ordered by M/IRM, the payment officer must review the signed packing slip and authorize payment accordingly. The packing slip must be promptly forwarded by fax or interoffice mail to the Computer Equipment Analyst in M/IRM/PMA, who must enter inventory information into the Automated Inventory Management System (AIMS). To ensure that IT resources procured outside of M/IRM are entered into the inventory system, M/FM must send a monthly listing of IT resources for which payment has been made. The list must be compared to the inventory and discrepancies rectified.

The IT Specialist in USAID/W and Systems Manager overseas for IT resources must test equipment upon installation, and immediately notify M/IRM of equipment problems. The IT Specialist/Systems Manager for IT resources must immediately attach to the equipment inventory bar code labels that are used to identify equipment for M/IRM. The serial numbers of serialized hardware and software, final location of equipment, and bar code number must be recorded on a copy of the packing slip, and sent by interoffice mail or fax, to the computer equipment analyst in M/IRM to be entered into the inventory system. Packing slips must be maintained on file by M/IRM along with the purchase order to verify receipt of equipment and payment authorization.

547.5.8 IT TRANSFER

When software is disposed of through redistribution, transfer, sale, grant-in-aid, project contribution, or donation seems merited, overseas missions must follow the conditions of the licensing agreement regarding transfer of ownership.

E547.5.8 IT Transfer - N/A

547.5.9 HARDWARE/SOFTWARE MAINTENANCE

M/IRM shall manage the OE-funded core equipment worldwide maintenance contract for IT resources for USAID/W and participating Missions. M/IRM shall also manage maintenance of all OE-funded, end-user IT resources in USAID/W.

Missions, as of Fiscal Year 1995 and beyond, must fund and arrange for hardware and software maintenance. Missions electing to participate in the optional, [worldwide maintenance program](#) for computer hardware, which M/IRM has implemented, must provide contribution funding. Missions electing not to participate must arrange for local maintenance.

E547.5.9 Hardware/Software Maintenance

If maintenance is requested for IT resources not found in the USAID/W inventory, the office director of the organization requiring maintenance must provide a memorandum to M/IRM stating why the equipment is not listed in the official inventory. This situation must be reviewed by M/IRM for determination.

Because worldwide equipment maintenance services are provided by several different contractors, it is essential that the following essential procedures are followed to reduce unnecessary maintenance costs.

- a) Users must report any problems with automation equipment to the IT Specialist/Systems Manager. The IT Specialist/Systems Manager must investigate equipment problems to determine resolution.
- b) After determining that USAID/W equipment maintenance is required, the IT Specialist must notify M/IRM's Maintenance Coordinator who must place a service call to the maintenance vendor.
- c) After determining that overseas equipment maintenance is required, the Systems Manager must make appropriate arrangements for repair based on warranty coverage and other maintenance services available to the overseas location.

Systems Managers must consider whether systems are considered obsolete or cost-effective to repair when making maintenance decisions. Systems Managers who have elected to participate in the worldwide maintenance contract must notify the M/IRM Maintenance Coordinator if the vendor is not performing or problems have not been resolved.

d) The IT Specialist/Systems Manager must maintain a maintenance log to track the maintenance process. The following information must be entered into the log by the IT Specialist/Systems Manager prior to calling M/IRM or the maintenance vendor:

- 1. Bureau/Office symbol or number;**
- 2. Problem description;**
- 3. Manufacturer, type, model and serial number of equipment;**
- 4. Location of equipment;**
- 5. Name of the user; and**
- 6. Call date and time.**

e) The following information must be entered in the log when the service technician arrives:

- 1. Maintenance Control Number or Activity Report Number (assigned by the vendor and used on invoices);**
- 2. Field Service Reports and the monthly repair log submitted by the vendor;**
- 3. Name of technician; and**
- 4. Arrival date and time.**

f) The following information must be entered in the log when the service technician departs:

- 1. Closed date and time; and**
- 2. All appropriate comments.**

The log must be retained as an official file for a minimum of two years.

g) When the service call is completed, the service technician must provide a Field Service Report or Activity Report to the IT Specialist/Systems Manager. The Report must include the:

1. Maintenance Control Number or Activity Number;
2. Date and time of arrival;
3. Repair completion date and time;
4. Manufacturer, type, model, and serial number of the equipment;
5. Location of the equipment;
6. Description of the malfunction; and
7. A list of parts replaced.

547.5.10 DISPOSITION/REDISPOSITION OF IT RESOURCES

When obsolete software is abandoned, it shall be deleted from hardware. Source disks, manuals, and licenses shall be destroyed concurrent with the property disposal action conducted in the inventory system.

E547.5.10 Disposition/Redisposition Of IT Resources - N/A

547.5.11 EXCESS CAPITAL PROPERTY

M/IRM shall report all excess capitalized property to M/FM for adjustment to the General Ledger.

E547.5.11 Excess Capitalized Property

Capitalized property in USAID/W or overseas that is in excess must be reported by M/IRM, via a completed copy of Form OF-132, Property Disposal Authorization and Survey Report, to M/FM for adjustment to the General Ledger.

547.6 Supplementary Reference - N/A

547.7 Mandatory Reference - N/A

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