

SOCIAL SECURITY ADMINISTRATION
PERSONAL PROPERTY MANAGEMENT HANDBOOK
OFFICE OF BUDGET, FINANCE, AND MANAGEMENT
OFFICE OF FACILITIES AND LOGISTICS
MANAGEMENT

VERSION 2.0

UPDATED: MARCH 2025

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CHAPTER 1 – OVERVIEW

1.1 PURPOSE

The purpose of this Handbook is to establish the agency's policy for maintaining Social Security Administration (SSA) personal property. It provides guidance and information on employees' roles and responsibilities related to property management; prudent handling of government property; accounting for property; reutilization of SSA property; reporting lost, stolen, and/or damaged property; determining when property is excess; proper disposal of property; and acquiring excess federal personal property. Understanding that organizational areas within SSA manage different types of property for different reasons, it is important to clarify that the instructions and policies within this handbook is established for fiduciary accountability and proper disposal purposes of physical Personal Property in accordance with General Service Administration (GSA) and Federal Management Regulations (FMR). All references to satisfying PII requirements and Network requirements are strictly for informative and failsafe purposes. PII sanitization methods and Network connectivity requirements are strictly determined by and performed by IT staff. This Handbook is not a source or substitute for Federal Information Security Modernization (FISMA), SSA's Information Security Policy (ISP), National Institute of Standards and Technology (NIST) or the Government Accountability Office (GAO) et. al. Refer to the [ITAM Policy](#) for managing IT related property. For assistance with anything in this Handbook and/or your personal property questions, please contact the Personal Property Team member responsible for your area as listed on this [Personal Property Team Contact List](#) webpage.

1.2 BACKGROUND

Property management is the management and accountability of personal property, including storage, utilization, and disposal. Personal property is any agency property purchased or leased with agency funds, with the exception of real property (land and buildings). See Section 1.5 for categories of personal property.

1.3 SCOPE

The information in this Handbook is applicable to all headquarters and non-headquarter agency employees responsible for maintaining, tracking, inventorying, and disposing of personal property.

1.4 AGENCY RESPONSIBILITIES

The agency has a responsibility to ensure that SSA personal property is maintained, controlled, and protected throughout its lifecycle. Per [40 United States Code \(U.S.C.\) 524, Duties of Executive Agencies](#), amended and enacted on January 3, 2019, we are required to:

- A. Maintain adequate inventory controls and accountability systems for property under our control;
- B. Conduct annual inventories and assessments of capitalized and accountable personal property to identify and determine when property becomes excess;
- C. Reutilize excess property within SSA to the greatest extent possible;
- D. Promptly report excess property that cannot be reutilized within SSA to the General Services Administration (GSA);
- E. Perform the care and handling of such excess property; and

- F. Properly dispose of excess property that cannot be reutilized within SSA as promptly as possible in accordance with authority delegated and regulations prescribed by the Federal Management Regulations (FMR), GSA, and SSA policies and procedures.

1.5 CATEGORIES OF PERSONAL PROPERTY

There are four categories of property within the agency:

A. Capitalized Property –

- 1) Property with a value of \$100,000 or more. In accordance with generally accepted accounting principles, capitalized equipment is recorded as an asset in the agency's financial management system and is expensed through the depreciation process over the equipment's useful life. Most components will not have capitalized property in their inventory

B. Accountable Property –

- 1) Property owned, leased, or under SSA's control that has an aggregate value of \$5,000 to \$99,999 and property as listed in the [ITAM Policy](#) for OCIO.

C. Sensitive Property –

- 1) Any property that can retain personally identifiable information (PII) when powered off and weapons as described by its Federal Supply Classification Code.
 - PII is defined as any information that could potentially identify an individual; information that can be used to distinguish one person from another; and information that can be used to de-anonymize anonymous. Examples of PII include social security numbers, phone numbers, email addresses, home addresses, alpha-numeric characters used for logging into a computer or webpage, image of people, home, car, school, or place of employment etc.
- 2) Property that can retain PII is considered sensitive regardless of whether or not PII is actually contained within the actual property (e.g., a computer, camera, mobile device, or scanner that has never been used) is considered sensitive property.
- 3) Examples of sensitive property include, but are not limited to:
 - Computers (e.g., workstations, towers, servers, laptops, tablets, etc.)
 - Mobile communication devices, (e.g., smart phones, Blackberry devices)
 - Storage devices (e.g., hard drives, tape drives, thumb drives)
 - Scanners, copiers, fax machines

- D. Expendable Property – Property of small value that does not need to be accounted for or shown on inventory. Expendable property includes pens, pencils, tape dispensers, etc.

1.6 GOVERNMENT FURNISHED PROPERTY (GFP) AND CONTRACTOR ACQUIRED PROPERTY (CAP)

- Contracting Officers shall appoint Property Administrators and Plant Clearance Officers e.g., Contracting Officer Representative (COR) as required for contracts involving Government Furnished Property (GFP).

- Property Administrators and Plant Clearance Officers should coordinate efforts with Property Management Officers (PMO) ([Headquarters](#) / [Regional](#)) to ensure necessary property is inventoried in the appropriate custodial area and disposed of in accordance with GSA and FMR to ensure proper disposal.
- The Custodial Officer (CO) in the component for which the property is used or mission is supported manages and processes the final disposition of GFP and CAP. The Property Management Officer (PMO) will appoint a CO if one was not already assigned or if the DOORS code was not established at the time of the award.

1.7 ACCOUNTABILITY FOR PERSONAL PROPERTY

Custodial Officers (CO) must maintain an inventory of capitalized, accountable, and sensitive equipment within their respective custodial areas. The Asset Management Portal (AMP) is the agency's asset management system where COs can maintain their inventory. To link to the Asset Management Portal, visit the [SSA Asset Management Webpage](#).

CHAPTER 2 – PROPERTY MANAGEMENT PROGRAM

2.1 ROLES AND RESPONSIBILITIES

A viable and accurate property management program requires the cooperative efforts of many individuals involved in the process of accounting for personal property through a structure comprised of Property Management Officials, Property Management Officers (PMO), and COs. We assign these duties to different individuals to ensure we have separation of duties for internal control purposes.

2.2 PROPERTY MANAGEMENT LEADERSHIP

A. Property Management Director

The Associate Commissioner for the Office of Facilities and Logistics Management (OFLM) is the Property Management Director (PMD). The PMD has oversight for the agency-wide property management program and ensures our program is in accordance with the [FMR](#). The PMD appoints the Property Accountable Director (PAD) and delegates functions to this position.

B. Property Accountable Director

The Director for the Office of Media and Logistics Management (OMLM) serves as the PAD. The PAD assists the PMD with managing and overseeing the agency's property management program by ensuring we promulgate property management policies.

C. Property Accountable Officer

The Director for the Division of Warehouse Management within OMLM serves as the Property Accountable Officer (PAO), who assists the PMD and PAD with providing oversight and guidance to agency PMOs, CO, and Alternate COs (ACO) about issues related to property management, including guidance on the disposal process and conducting a physical inventory. The PAO oversees employees on the Personal Property Team (see below).

D. Personal Property Team (PPT)

Members of PPT are responsible for managing the day-to-day mechanics of the agency's property management program. PPT develops and implements policies, procedures, and controls on all aspects of SSA's property management program; provides oversight and policy guidance on safeguarding property and preventing unauthorized use of property agency-wide; promotes reutilization of excess property within SSA; and provides support and guidance to all agency offices and staff components.

PPT members are here to assist with all property concerns related to the Handbook. You can find the PPT member responsible for your area here [Personal Property Team Contact List](#).

E. Agency Component Heads and Regional Commissioners

Deputy Commissioners and equivalents (including Executive Officers) appoint PMOs within their components at headquarters, typically at the Associate Commissioner-level. Regional Commissioners and equivalents appoint PMOs located within their regions. Agency Component heads and Regional Commissioners must appoint enough PMOs to effectively oversee all COs, ACOs, and Detailed Office/Organization Resource System (DOORS) codes within their jurisdictions. For information on appointing PMOs and COs, visit the [PMO/CO/ACO Authorization Forms and Instructions webpage](#).

2.3 PROPERTY MANAGEMENT OFFICERS (PMO)

PMOs oversee property management for a specific agency component and provide leadership and guidance to COs within their component. The PMO approving official must be senior enough to have authority over the offices the PMO oversees (Deputy Commissioners and equivalents including Executive Officers within their components at headquarters, typically at the Associate Commissioner-level. Regional Commissioners and equivalents appoint PMOs located within their regions). Specifically, PMOs are responsible for:

- A. Completing, signing, and submitting the [Property Management Officer's Authorization Form](#), which is required to acknowledge acceptance of the PMO's roles and responsibilities. PMOs should send the forms to the PPT member responsible for their region, state, territory, or headquarters component on the [Personal Property Team Contact List](#).
- B. Assisting PPT with personal property matters, as needed.
- C. Appointing enough COs and ACOs to effectively manage property for all DOORS codes within their jurisdiction. Only government employees are eligible for the CO position. Contractors can be appointed to the ACO position.
- D. As a matter of checks and balances Property Management Officers (PMO) cannot also be a Custodial Officer (CO) or Alternate Custodial Officer (ACO) for the same DOORS code.
- E. Sending completed and signed CO statements to the [PPT member](#) responsible for their region, state, territory, or headquarters component listed on the PPT member website.
- F. Maintaining a list of all COs and ACOs and their contact information within their jurisdiction.
- G. Promoting reutilization of excess property within SSA, when possible.
- H. Providing leadership and guidance to the COs within custodial areas on the proper use, care, and disposal of personal property in accordance with property management policies and procedures.
- I. Processing required documentation regarding personal property management issues.

For a list of current PMOs, click the applicable link: [Field PMOs](#) or [Central Office PMOs](#).

2.4 CUSTODIAL OFFICERS AND ALTERNATE CUSTODIAL OFFICERS

PMOs appoint COs and ACOs to control the property within a custodial area. COs and ACOs should be located within the custodial area and in close proximity to the property. Only government employees are eligible for the CO position. Contractors can be appointed to the ACO position.

A. Custodial Officers

- 1) Completes, signs, and submits the [Custodial Officer's Authorization Form](#), which is required to acknowledge acceptance of the CO's roles and responsibilities. COs should send the forms to their PMO to officially submit for processing.
- 2) Conducts an initial inventory of the custodial area within 90 calendar days of signing a Property Authorization Statement.
 - Compares and reconciles initial inventory with most recent inventory from previous CO.
 - CO uses [SSA Report of Survey from 342](#) to report any discrepancies.
- 3) Assists PMOs in performing periodic property management surveys and processes paperwork to transfer or dispose of excess personal property.
- 4) Establishes, maintains, and updates inventory records for each assigned custodial area.

- 5) Conducts an annual inventory every fiscal year for all accountable, capitalized, and sensitive property and special inventories, as necessary.
- 6) Acquiring excess federal personal property for SSA when applicable
- 7) Ensures property is accurately barcoded and requests barcodes, as necessary, by following the instructions at [Acquiring Barcodes](#).
- 8) Performs periodic reviews of existing property and identifies excess personal property for reutilization or disposal.
- 9) Accounts for lost, damaged, or stolen agency personal property.
- 10) Assists the PMO and/or PPT with property management issues, as necessary.

A. Alternate Custodial Officer

- 1) Completes, signs, and submits the [Alternate Custodial Officer's Authorization Form](#), which is required to acknowledge acceptance of the ACO's roles and responsibilities. ACOs should send the forms to their PMO to officially submit for processing.
- 2) Takes all administrative actions necessary to assist the CO.
- 3) Serves as backup regarding property management within the assigned custodial area.

2.5 MANAGERS AND EMPLOYEES

Per the agency's [Annual Personnel Reminders – Standards of Conduct](#), all managers, employees, and contractors have a duty to use and safeguard Government property, and not use property for other than authorized purposes.

A. Managers

Managers at all levels must ensure that all employees are aware of their responsibilities and are held accountable for the proper use and care of Government-owned or leased property in their possession. Management must:

- 1) Establish and enforce administrative measures for the proper use, care, and disposal of personal property in accordance with property management policies and procedures; and
- 2) Cooperate with property management officials at all levels to ensure agency compliance with property management programs and initiatives.

B. Employees

Agency employees must do the following when it comes to property management:

- 1) Exercise reasonable and responsible care for all Government-controlled personal property in the employees' possession.
- 2) Report lost, stolen, or damaged property to the CO and immediate supervisor.
- 3) Return all assigned personal property (i.e.; laptop, mobile phone, and all Government owned property used at Alternate Duty Station) to their current manager prior to separating from the agency. When the employee moves to another component within the agency because of a reassignment, promotion, etc., only the laptop is transferred to the entering component.
- 4) Identify property within the custodial area that is no longer necessary and inform the CO about the excess property.

CHAPTER 3 – CONDUCTING INVENTORY AND MAINTAINING RECORDS

3.1 INVENTORY OVERVIEW

Inventory is the formal listing of all personal property, excluding expendable property, existing within a custodial area.

- A. Custodial areas are defined by DOORS codes and managed by COs.
- B. A physical inventory is the act of locating, identifying, counting, and recording property with property records.
- C. Physical inventories verify that personal property is located in (or missing from) the custodial area where assigned, including teleworkers' alternate duty station.
- D. COs should continually adjust their inventory to account for acquisitions, disposals, and other property changes that occurred throughout the year.

3.2 INVENTORY PROCESS

Maintaining accurate inventories is mandatory.

A. Each inventory must include:

- 1) For each qualified asset at every stage of the lifecycle:

DOORS code, barcode #, description, manufacturer, model, and serial #

- 2) For each asset transferred/reutilized to another office within SSA:

COs from the transferring and receiving offices must maintain documentation confirming transfer of property (e.g., email conformation)

- 3) For each disposal record:

Disposal date, disposal method, and disposal recipient (i.e. name, phone number, email and physical address for federal, state, school, qualified organization, individual or recycler) for all disposed of property.

COs must maintain an inventory of capitalized, accountable, and sensitive equipment within their respective custodial areas. PMOs, COs, and ACOs will have access to the Asset Management Portal (AMP) to help manage their inventories¹.

3.3 ANNUAL INVENTORY

It is SSA's policy that COs must conduct an annual inventory of capitalized, sensitive, and accountable property every fiscal year. COs should conduct the annual inventory no later than 90 days after the close of the fiscal year (September 30) and/or as directed by their PMO or the Personal Property Team.

- A. Account for all SSA personal property within their custodial area. COs must know from where the property came, the present location of property within their custodial area, and either to whom or where the property was reutilized within the agency or through which agency, organization, or party the property was disposed of and how.
- B. COs must evaluate the age and condition of the property, the extent to which the agency uses the property, the extent to which the mission of the agency is dependent on the property, and any other necessary aspects as deemed appropriate by GSA.
- C. COs must use the [SSA Online Annual Property Inventory Certification](#) (OAPIC) application to confirm that they successfully reconciled their annual inventory. “Reconciled” means accurately accounts for property currently in their custodial area and any property of which they reutilized within SSA, disposed of or missing.
- D. Review property for functionality and utilization and excess any items no longer needed by following the Disposal Procedures in Chapter 5.
- E. If property is missing or damaged, follow the *Reporting Lost, Stolen, or Damaged Property* procedures in Chapter 4.

3.4 SPECIAL INVENTORY

Policy requires a special inventory when there is a change in a CO for a given custodial area. Both the incoming and outgoing COs must conduct an inventory, either jointly or separately within 30 days of the change in CO.

When a change in a CO occurs, the PMO must assign a new CO and forward a completed [Inventory Certification Form](#) to the [Personal Property Team](#) member responsible for their area. Alternatively, the new CO can use the [SSA Online Annual Property Inventory Certification](#) application to confirm this special inventory in conjunction with the mandatory annual inventory, if an annual inventory for the same fiscal year has not been submitted.

CHAPTER 4 – REPORTING LOST, STOLEN, OR DAMAGED PROPERTY

All SSA employees are responsible for safeguarding property. In the event of loss, theft, or damage to SSA-controlled personal property, employees are to report promptly to the appropriate CO, through their immediate supervisor. COs will complete a [Form SSA-342, Report of Survey](#) for lost, stolen, or damaged property.

4.1 PROCEDURES FOR REPORTING LOST, STOLEN, OR DAMAGED PROPERTY

The procedures for reporting loss, destruction of, theft, or damage to SSA accountable, sensitive, and capitalized controlled personal property are identified below.

A. Custodial Officer

When SSA-controlled personal property is lost, stolen, destroyed, or damaged, the CO will:

- 1) Ensure that area of occurrence is not disturbed pending investigation by law enforcement officials.
- 2) Notify appropriate authorities:

In both the region and headquarters, when property is missing, incidents are reported electronically using the Automated Incident Reporting System (AIRS) using form [SSA-3114-U4, Incident Alert](#).

Additionally, in headquarters when property is missing, the Federal Protective Officer or the Contract Guard (whoever arrives on the scene first) must prepare an [Offense Incident Report, Form GSA-3155](#). A copy is forwarded to the Office of Security and Emergency Preparedness' Office of Protective Security Services, while the initiator retains the original copy.

- 3) Prepare and submit a Form [SSA-342, Report of Survey](#) in accordance with instructions reflected on the form (with copies of any reports prepared by investigating law enforcement officers) to the appropriate component PMOs.
- 4) Attach copies of all law enforcement and/or other investigative reports (police reports, FBI reports, Inspector General reports), photos, statements by individuals, etc.
- 5) Employee and/or CO should review [Form SSA-342, Report of Survey](#), for accuracy.
- 6) Forward the completed case and documentation to the appropriate PMO for review.

B. Property Management Officer

Upon receipt of the completed Report of Survey from the CO, the PMO will:

- 1) Review the case for completeness and accuracy of all documents. If necessary, return to the CO for corrections or more information.
- 2) In cases where the Federal Protective Service or local police authorities are still conducting an investigation, the PMO will not forward any documents to the PAO until the investigation has been completed. The PMO will notify the [PAO](#) in writing (electronic mail is acceptable) of the missing item.

- 3) Conduct a preliminary review with the appropriate COs regarding the circumstances surrounding the reported lost, stolen, destroyed, or damaged SSA-controlled personal property. If the property is located, annotate and return the Report of Survey form to the initiator and contact investigating officials and arrange for the property to be returned.
- 4) Forward cases requiring further action electronically to the [PAO](#) or mail the information to Rm 2506, RMB, 6401 Security Blvd. Baltimore, MD 21235.

C. Property Accountable Officer

Upon receipt of a Report of Survey, the PAO will:

- 1) Review the Report of Survey for completeness. If necessary, return to the PMO for corrections or more information.
- 2) Make the determination of whether the lost, stolen, or damaged property requires further investigation or was a non-malicious accident.
- 3) For cases requiring further action, transmit the Report of Survey to the Determining Authority (see Section 4.3) to request that a full Board of Survey convene, if applicable.
- 4) For all ITS equipment, send one copy of the final Report of Survey to the ITS Inventory Branch, OSOHE, Rm. 570 Perimeter East Building.

4.2 BOARD OF SURVEY

The PAD appoints individuals to serve on the Board of Survey, who will review all reported facts and circumstances surrounding a loss, theft, destruction of, or damage to SSA-controlled personal property and review investigative report(s) from law enforcement officials to determine whether additional action is required.

A. Board Responsibilities

Upon completion of all law enforcement and/or official investigations, the Board of Survey will:

- 1) Review all cases presented for action, and
- 2) Make findings and recommend a determination regarding responsibility/accountability for personal property cases where the facts, circumstances, and investigative reports are adequate.

B. Survey Officer (Chairman of the Board of Survey)

The individual appointed to act as Chairman of the Board of Survey will:

- 1) Chair Board of Survey meetings.
- 2) Sign all documents and recommendations resulting from Board of Survey deliberations.
- 3) Forward completed cases to the Determining Authority.
- 4) Act independently of the full board in cases involving loss of, or damage to, personal property having a line item value of \$5,000 or less.

NOTE: If theft, misappropriation, negligent, or malicious damage is suspected to be the basis for the loss, destruction, or damage, full board action is required.

4.3 DETERMINING AUTHORITY

The Determining Authority for headquarters and field components is the PAD, who appoints the Survey Chairman and members to the Board of Survey. The Determining Authority determines whether the involved individual(s) is personally responsible/accountable and assesses the amount of financial liability, if any; informs the involved person(s) of their appeal rights in cases involving financial liability; and issues final disposal instructions for any damaged or destroyed personal property.

The Determining Authority responsibilities are as follows:

- A. Review the underlying facts, findings, and recommendations of the Board of Survey.
- B. Review any additional written information or request for relief submitted by the involved person(s) within the 10 day period and either approve or amend the recommended action.
- C. In all cases in which an employee (or group of employees) is held to be responsible, advise the employee(s) of his/her appeal rights to the appellate authority specified in Section 4.4 below.
- D. Make the final determination concerning the case, complete item 8 of the Form SSA-342, Report of Survey, and distribute copies as follows:
 - 1) Cases involving no financial liability:

Send all copies to the [PAO](#) for fiscal vouchering and further distribution. The PAO forwards a copy to the involved individual(s).
 - 2) Cases involving potential financial liability:
 - Send one copy to the [PAO](#).
 - Send one copy to the involved individual(s); inform the involved individual(s) that the determination may be appealed, in writing, within 15 business days.
 - Send one copy to the Associate Commissioner, Office of Financial Policy and Operations (OFPO) to initiate recovery action, if applicable.
 - 3) Cases in which a determination has been made that an individual not employed by the Government is responsible for the loss or damage will be referred to the OFPO for collection of funds.

4.4 APPEALS

The Commissioner for Social Security has administrative appellate level authority in cases for which financial liability has been assessed against an SSA, non-SSA, or contract employees in headquarters or field components. The Commissioner has further delegated this authority to the Deputy Commissioner for Budget, Finance, and Management (DCBFM) for SSA employees in headquarters and field components. The Office of the Inspector General retains appellate authority for all matters within its jurisdiction.

- A. All appeals of the Determining Authority action must be made within 15 business days, through appropriate management channels, to:
 - 1) [PAO](#) for all SSA employees.
 - 2) Commissioner of Social Security — for SSA contractors and individuals not employed by SSA.

- B. All appeals requesting that the determination be reviewed must be in writing and include any additional information that may affect the initial finding.
- C. The case will be fully reviewed, taking into consideration any supplemental information provided by the individual(s) making the appeal. The Appellate Authority will affirm the original determination, recommend additional action, modify the determination, and recommend action in conjunction with any new facts. All determinations at the administrative level of appeal are the final decision of the Commissioner.
- D. Upon final agency determination of financial liability, the Appeal Authority may initiate collection actions, including, but not limited to, Personnel Actions and/or court proceedings.

CHAPTER 5 – DISPOSAL/TRANSFER OF EXCESS PERSONAL PROPERTY

This chapter provides the agency's policies for disposing of and reporting on excess property. PMOs and COs are responsible for monitoring property under their custodial area(s) and determining whether to reutilize or dispose of property that is not being used. COs must report excess property that they cannot reutilize within SSA to their PMO for approval prior to disposing of the property. The PMO is the only position within the agency with delegated authority to approve the disposal of Government property.

Only SSA employees who are Custodial Officers (CO) or Alternate Custodial Officers (ACO) are eligible for full GSA [PPMS](#) Access. PMOs are responsible for appointing, overseeing, promoting reutilization, and approving pre-excess requests when appropriate. COs and ACOs can forward the GSA-PPMS Access Request Form to the [SSA National Utilization Officer](#) for full GSA_PPMS Access.

PMO approved Capitalized, Accountable and Sensitive excess property in new and useable condition must be offered to other federal agencies or eligible schools when permitted directly or through GSA-PPMS. Disposal methods for PMO approved excess property in repairable, salvage and scrap condition can be disposed of at the Custodial Officers discretion in accordance with GSA, FMR, and SSA regulations.

Disposal methods include:

- Computers for Learning (CFL) (Qualified K-12 institutions (for computers))
- Direct Transfer to Federal agencies
- Federal screening
- State/local government screening
- Gov-Sales
- Abandonment and Destruction (A&D)
- Recycle (must be [R2 and/or e-Steward certified](#))

You can find detailed procedures for disposing of excess Federal property at GSA's [Personal Property Disposal Guide](#).

5.1 AGENCY RESPONSIBILITIES

Each executive agency, as far as practicable, and in accordance with [40 UC 524\(b\)](#) shall:

- A. Reassign property to another activity within the agency when the property is no longer required for the purposes of the appropriation used to make the purchase.
- B. Transfer excess property under its control to other Federal agencies and to organizations specified in section [40 USC 321\(c\)](#) as follows (non-HQ only):
 - 1) Mixed-ownership government corporations;
 - 2) The municipal government of the District of Columbia; and
 - 3) A requisitioning non-federal recipient when the function of a Federal agency authorized to procure for it is transferred to the Administration.

5.2 REUTILIZING PROPERTY WITHIN THE AGENCY

Federal regulations require agencies to internally reassign or transfer the property to another activity or component before deeming the property excess. This requirement minimizes procurement costs of new property and reduces waste.

5.3 DISPOSAL PROCEDURES

COs must report to PMOs property with no foreseeable need after a period of nonuse exceeding six months as unrequired property and available for use within the agency, or as excess property that is available for use by other Federal agencies.

COs located outside of the Baltimore/Washington headquarters area must complete, submit, and retain copies of all necessary disposal forms on their office shared drive for their records and for office audit trail purposes. GSA and SSA disposal forms are located on the [SSA Asset Management](#) webpage.

- SSA policy is to provide full GSA-PPMS access only to Custodial Officers (CO) and Alternate Custodial Officers (ACO). PMOs are responsible for appointing, overseeing, promoting reutilization and approving pre-excess requests when appropriate.
- SSA Approving Officials for GSA-PPMS must be a higher position than the CO/ACO e.g. supervisor and cannot be a CO/ACO.

A. Requirements for PMOs, COs, and ACOs (Headquarters and Non-Headquarters)

All COs and ACOs must manage and track property in their custodial area. If a CO or ACO identifies property as excess, the respective PMO must approve the request electronically. PMOs, COs, and ACOs will have access to the Asset Management Portal (AMP) to help process their excess property.

All PMOs, COs, and ACOs must retain all copies of disposal records, including the excess request, approvals, and communication with any other parties regarding recycling, disposal, and donations.

- 1) All pre-excess requests must follow guidelines listed in Chapter 5 “Disposal/Transfer of Excess Personal Property” of the Personal Property Management Handbook.
- 2) COs/ACOs must accurately select the appropriate condition code for each piece of excess property. Condition codes are as follows:
 - 1 NEW/UNUSED Can be used immediately, without modifications or repairs
 - 4 USABLE Shows some wear, but usable without significant repair
 - 7 REPAIRABLE Unusable in its current condition, but can be economically repaired
 - X SALAVGE Property which has value in excess of its basic material content, but repair or rehabilitation is impractical and/or uneconomical
 - S SCRAP No value, except its basic material content

COs/ACOs must provide specific reasons for selecting Repairs Required, Salvage, or Scrap. When other Federal and state agencies and qualified organizations take excess property from SSA, they need to know specifically the condition of the property. Some property is used to repair their existing property. Reasons must include specifically which part to the property does not function or needs repairs.

B. Headquarters Disposal Procedures

- 1) PPT conducts final dispositions of excess property for headquarters components.
- 2) COs/ACOs submit Pre Excess Requests to PMOs for approval. All requests must obtain PMO approval.
- 3) PMOs must review and approve or disapprove (e.g. recommend reutilization) the pre-excess request.
- 4) Once the PMO approves the Pre Excess request, the CO or ACO must clearly mark/label the excess property to be picked up. The CO/ACO must attach a copy of the AMP conformation email to the approved excess property.
- 5) The PPT Analyst will arrange for pickup and proper disposition of the excess property.
- 6) PMOs, COs, and ACOs should contact their [PPT Analyst](#) if the excess property is not removed after 5 business days from the date the PMO submitted the request to the PPT analyst.

C. Non-Headquarters Office Disposal Procedures

1) CO Responsibilities

COs must:

- Document all excess personal property for PMO approval.
- Properly dispose of PMO-approved excess property in accordance with GSA, FMR, and SSA policies and procedures.
- Report disposed of property to GSA as required using appropriate form(s).
- Report all final disposal actions to their PMO.
- Retain all disposal records for six years.

2) PMO Responsibilities

PMOs must:

- Reutilize property to the greatest extent within SSA.
- Approve disposal requests as necessary.
- Maintain an awareness of regional property requirements pertaining to incoming disposal requests.

5.4 REMOVAL OF SENSITIVE INFORMATION FROM PERSONAL PROPERTY

Federal regulations require that agencies remove sensitive information or PII from IT equipment prior to disposal. To prevent the loss of PII, all agency employees and contractors must follow instructions provided in the [Information Security Policy \(ISP\)](#) for policies on the disposal of IT media.

A. Headquarters Responsibilities

Headquarters IT staff is responsible for following the [ISP policy](#) to sanitize and wipe all hard drives and IT media prior to disposing of the excess property. Non-Headquarters Responsibilities

Non-headquarters offices must:

- 1) Designate a Local Area Network (LAN) administrator or Site LAN Coordinator (SLC) to follow [ISP policy](#) to erase/wipe clean hard drives of all IT equipment before removal from the worksite or oversee the contractor's performance when sanitizing agency IT equipment.
- 2) Follow the Office of Systems' [Tape and Hard Drive Disposal Procedures](#). Staff must collect and ship obsolete tapes, old hard drives, and server hard drives to the National Support Center for destruction at 8999 Bennett Creek Blvd, Frederick MD 21704. Place removed hard drives in a secure location with restricted access while awaiting destruction.

5.5 DISPOSAL OF STORAGE PROPERTY

Storage property, such as safes, refrigerators, filing cabinets, and other property that can hold items, must be empty prior to being disposed. COs must ensure the property is unlocked and empty of all its contents, including food in refrigerators and folders, papers, and personal items in desks and filing cabinets. For lockable property, the COs must leave the keys and combinations with instructions attached. Locked property with no keys or combinations available must be unlocked at the component's expense to check contents prior to pick-up.

5.6 TRANSFERRING PROPERTY TO OTHER FEDERAL AGENCIES

We can transfer excess personal property directly to another Federal agency using an [SF-122, Transfer Order Excess Personal Property](#) without first reporting it to GSA. Once the transfer is complete, the agency must report it to GSA. Direct transfer procedures contained in the [FMR 102-36.145](#) allow transfers under the following conditions:

- A. Total acquisition cost is \$10,000 or less per line item. The authorized official at the acquiring agency must file an SF-122 and provide a copy to GSA office within 10 days.
- B. Total acquisition cost exceeds the \$10,000 per line item limitation, but the appropriate GSA Personal Property Management Office has verbally approved a prearranged transfer. In this situation, the receiving organization must prepare an SF-122, with the name of the GSA official and the date of the verbal approval. The acquiring agency must send a copy to GSA within 10 days.
- C. COs must request and retain a copy of the SF-122 for their records

The costs incurred for transfers of excess property, including handling and transportation, is the responsibility of the receiving agency.

For detailed guidance on transferring property to other Federal agencies, visit GSA's website [Transferring Property](#).

5.7 DONATING IT EQUIPMENT FOR EDUCATIONAL PURPOSES

[Executive Order \(EO\) 12999, Educational Technology: Ensuring Opportunity for all Children in the Next Century](#) allows for the transfer of excess computer equipment and software directly to educational institutions. EO 12999 requires Federal agencies, to the extent permitted by law and where appropriate, to transfer excess and surplus Federal computer equipment to schools and nonprofit organizations, and encourages Federal employees to volunteer their time and expertise to assist teachers in learning to use the computers to teach. Computer equipment, such as central processing units, printers, modems, routers, servers, supplies, support equipment, and computer furniture (i.e., computer stands and tables), become excess when equipment is replaced by newer, upgraded equipment and is no longer needed by the agency.

A. Computer Donation Instructions for PMOs/COs (non-Headquarters)

After the PMO/CO determines there is no need for the excess IT equipment, the PMO/CO should consider donating the equipment to qualified K-12 educational organizations:

- Schools and educational nonprofit organizations located in the United States (U.S.), the U.S. Virgin Islands, American Samoa, Guam, the Commonwealth of Puerto Rico, or the Commonwealth of the Northern Mariana Islands, can receive computer equipment through the CFL Program. A school is eligible to participate if it is a public, private, or parochial school serving some portion of the pre-kindergarten through grade 12 population. Day care centers must provide a state approved preschool curriculum in order to participate.
- All qualified K-12 educational organizations must provide a valid National Center for Education Statistics (NCES) School ID or valid 501c3 Employer Identification Number (EIN).

B. Preparing Equipment for Donation

1) Equipment Configuration

All donated IT equipment should be in usable condition. For computer donations, the central processing unit, keyboard, mouse, and monitor that are part of a computer workstation configuration should remain together for donation. However, many organizations will accept individual components from a computer workstation configuration.

2) Equipment Sanitation

Prior to disposal and donation, agency staff must remove all data, software, and the operating system from installed hard drives or removable media included in the computer configuration. It is important to ensure all components of the computer are free of any PII.

3) Finalize CFL Transaction

The CO must complete the [SSA-296 Donation Certification Statement](#) and retain for their records, and report donated property to GSA.

5.8 REPORTING DISPOSED EXCESS PROPERTY TO GSA

Per [41 CFR 102-36.220](#), we must report all excess personal property to GSA, regardless of its condition, except when any of the following conditions apply:

- A. Directly transferring the property to another Federal agency pursuant to [41 C.F.R. 102-36.145](#);
- B. Disposing of property that is not required to be reported to GSA under [41 C.F.R. 102-36.220\(b\)](#);
- C. Property determined appropriate for abandonment/destruction under [41 C.F.R. 102-36.305](#); or
- D. Authorizing the agency to dispose of property without going through GSA (such as the authority under 15 U.S.C. § 3710(i)) for agencies to loan, lease, or give excess research equipment to an educational institution or nonprofit organization.

COs can report excess property through [GSA-PPMS](#) or via the [SF-120, Report of Excess Personal Property](#), to the appropriate regional GSA Personal Property Management Office. When COs report excess property to GSA through [GSA-PPMS](#), GSA may assist with the transfer of property to state and local organizations and the sale of property.

In [GSA-PPMS](#), use the following disposal condition codes to report the condition of personal property.

- 1 NEW/UNUSED Can be used immediately, without modifications or repairs
- 4 USABLE Shows some wear, but usable without significant repair
- 7 REPAIRABLE Unusable in its current condition, but can be economically repaired
- X SALVAGE Value in excess of its basic material content, but repair or rehabilitation is impractical or uneconomical
- S SCRAP No value, except its basic material content

5.9 ABANDONMENT AND DESTRUCTION OF PROPERTY

Abandonment or destruction of personal property is the final step of the disposal process that will result in the removal of equipment from an organization's inventory. [41 C.F.R. §102–36.305](#) provides authorization for agencies to abandon and/or destroy property when an agency official (e.g. CO or ACO) has made a written determination that:

- A. The property has no commercial value. No commercial value means that the property, through an agency's determination, has neither utility nor monetary value (either as an item or as scrap); or
- B. The cost of care, handling, and preparation of the property for sale would be greater than the expected sales proceeds (estimated fair market value).

[41 C.F.R 101–45.9](#) prescribes the policies and methods governing the disposition of personal property by abandonment. In general, you must not abandon or destroy property in a manner that is detrimental or dangerous to public health or safety. Additional guidelines for the abandonment/destruction of hazardous materials are prescribed in [41 CFR 101-42](#).

COs must retain completed [SSA Abandonment and Destruction Certification Form](#) for their records.

- The CO or ACO are required to print and sign on the Official's lines and a second SSA employee who has viewed the property and agrees with the A&D determination shall print and sign on the witness lines on the SSA Abandonment and Destruction Certification Form.

CHAPTER 6 – ACQUIRING EXCESS FEDERAL PERSONAL PROPERTY

Government regulations mandate that federal agencies consider acquiring excess personal property first, before purchasing new items. This approach saves taxpayers hundreds of millions of dollars each year. As good stewards of government property, the Social Security Administration promotes the reutilization of government property by making the agency's excess personal property available to other Federal, state, and local agencies through the General Services Administration's (GSA) Personal Property Management System (PPMS). The agency requires its purchasers to consider obtaining excess property from other agencies before purchasing new items. In accordance with GSA's policy, all agency employees and contractors have access to view PPMS to evaluate Federal excess property. When a component identifies a need for property, staff should check PPMS to view available excess property. Agency staff should obtain excess property from other agencies as long as it's more advantageous than purchasing new property based on factors such as age, condition, and cost to transport/repair. If excess property is found suitable to meet the agency's mission, staff must work through their respective Custodial Officers (CO) to obtain the property from GSA. As a matter of policy, and in the interest of checks and balances, the agency only allows COs to acquire excess property on behalf of agency employees and contractors who need the excess property.

6.1 ACQUIRING EXCESS FEDERAL PERSONAL PROPERTY

- 1) SSA personnel are required to check for suitable excess property from other federal agencies Prior to purchasing property.
- 2) SSA personnel can self-register for view only access on [GSA-PPMS](#) by clicking [Registration Information](#) and [Self-Register](#). Agency/Bureau auto populates with a valid Activity Address Code (AAC).
- 3) For assistance in acquiring your AAC, click Request Services and then AAC Help on this webpage <https://ommapps.ba.ad.ssa.gov/PinPointWizard/>.
- 4) Each property listing is identified by a unique Item Control Number (ICN).
- 5) Once the GSA Area Property Officer (APO) has allocated the personal property, GSA-PPMS will generate an email with a transfer order to the acquiring agency's approving official notifying him/her to go into GSA-PPMS and approve the property. Manual transfer orders will be sent by the APO to the acquiring agency for signature. The acquiring agency official signs and returns the transfer order to APO for GSA approval.
- 6) The APO will electronically approve the SF 122 after the acquiring agency's approving official approves the transfer. The system will then email a copy of the approval to the holding agency and the acquiring agency.
- 7) The acquiring agency must contact the disposing agency to arrange pickup. Pickup must occur within 15 calendar days from the date of allocation (21 days from date of allocation for DoD excess). The agency is responsible for requesting additional removal time if required.
- 8) Acquiring federal agencies do not typically pay for excess personal property. However, they are responsible for any packing, shipping, and transportation costs.

A. Non-Headquarters Offices i.e. offices located outside of the Baltimore / Washington Headquarters facilities

- 1) Only Custodial Officers (CO) and Alternate Custodial Officers (ACO) are permitted to request excess property listed on GSA-PPMS.

- 2) SSA Personnel interested in property available on GSA-PPMS must communicate directly with the point of contact listed in the ICN posting if they have any questions about the property prior to contacting their CO or ACO.
- 3) SSA Personnel should email their CO or ACO with the ICN and Item Description Name asking them to request the excess property for SSA.
- 4) COs and ACOs submit requests for the item(s) in GSA-PPMS. GSA generally approves transfers on a first-come, first-served basis.
- 5) The SSA Personnel / office initiating the request of GSA-PPMS property allocated to SSA is responsible for coordinating transportation of the property from the current location to SSA.
- 6) COs and ACOs can request full GSA-PPMS access by forwarding this [GSA-PPMS Access Request Form](#) to the [SSA National Utilization Officer](#).
- 7) The [Property Management Officer](#) responsible for your area can assist in identifying and/or appointing COs, and ACOs when necessary.

B. **Headquarters Offices** i.e. Only offices located within the Baltimore / Washington Headquarters facilities

- 1) SSA Personnel interested in property available on GSA-PPMS must communicate directly with the point of contact listed in the ICN posting if they have any questions about the property prior to contacting the [Personal Property Team Member](#) responsible for their area.
- 2) SSA Personnel should email the [Personal Property Team Member](#) responsible for their area with the ICN and Item Description Name asking them to request the excess property for SSA.
- 3) [Personal Property Team Members](#) submit requests for the item(s) in GSA-PPMS. GSA generally approves transfers on a first-come, first-served basis.
- 4) When GSA-PPMS property is allocated to SSA, The SSA Personnel / office initiating the request of GSA-PPMS property allocated to SSA is responsible for coordinating transportation of the property from the current location to SSA. The [Freight & Supply Distribution Team](#) can assist with transporting property to SSA Headquarters facilities.
- 5) The [Property Management Officer](#) responsible for your area can assist in identifying and/or appointing COs, and ACOs when necessary.

APPENDICES

APPENDIX A: AUTHORITIES

APPENDIX B: DEFINITIONS

AUTHORITIES GOVERNING PROPERTY MANAGEMENT

A. STATUTORY AUTHORITIES

Agency policies and procedures comply with mandatory requirements based on the following authorities that govern the property management program:

- Public Law 115-419, *Federal Personal Property Management Act of 2018*, requires executive agencies, including SSA, to conduct an inventory and assessment of accountable personal property under their control.
- [Title 40 U.S. Code Section 524, *Duties of Executive Agencies*](#), requires each executive agency to: (1) maintain adequate inventory controls and accountability systems for property under its control; (2) continuously survey property under its control to identify excess property; (3) promptly report excess property to the General Services Administration; (4) perform the care and handling of excess property; and (5) transfer or dispose of excess property as promptly as possible in accordance with authority delegated and regulations prescribed by the General Services Administration.
- [41 C.F.R. Chapter 102, Subchapter B, Federal Management Regulation, \(FMR\)](#)
- [41 C.F.R. Chapter 101, Federal Property Management Regulation \(FPMR\)](#)
- [40 U.S.C. 529, Annual Executive Agency Reports On Excess Personal Property](#)
- [31 U.S.C. § 3512 Executive Agency Accounting and Other Financial Management Reports and Plans](#)
- [Chief Financial Officers Act of 1990](#)

B. REFERENCES

Joint Financial Management Improvement Program, (JFMIP), Inventory Supplies and Materials System Requirements, JFMIP-SR-03-02

[Joint Financial Management Improvement Program, \(JFMIP\), Property Management Systems Requirements, JFMIP-SR-00-4](#)

General Services Administration (GSA) Personal Property Utilization and Disposal Guide

General Services Administration Personal Property Management Review and Guidelines, October 2006

DEFINITIONS

Accountability: The responsibility of accounting for the storage, use, and disposal of all SSA personal property, including maintaining appropriate documentation for all transactions affecting property (i.e., inventory records, transfer records, disposal records, Reports of Survey, etc.).

Accountable Area: The organizational or geographical limits assigned to a designated property officer to ensure property accountability.

Accountable Property: Property owned, leased, or under agency control with an aggregate acquisition value of \$5,000 to \$99,999.

Barcoded Items: A property item with the required SSA asset tag label defined as capitalized, accountable, or sensitive. We use barcodes for all property with an aggregate cost of \$5,000 or greater and/or can retain PII when powered off. The list of items requiring barcodes is available at [Items Requiring Barcodes](#). SSA does not affix barcodes to physical weapons; barcodes corresponding to weapons are recorded on the inventory and are physically maintained in a separate location from the weapon.

Board of Survey: A committee that reviews reported facts and circumstances related to lost, stolen, or damaged agency-controlled personal property. This committee meets for a specific event or for a prescribed duration.

Capitalized Property: Personal property with an aggregate acquisition value of \$100,000 or more.

Community-Based Educational Organizations: Non-profit entities that engage in collaborative projects with schools or have education as their primary focus. These organizations qualify as nonprofit educational institutions or organizations in accordance with section 203(j) of the Federal Property and Administrative Services Act of 1949, as amended.

Computers for Learning (CFL): A program sponsored by GSA in order to implement Executive Order 12999, *Educational Technology: Ensuring Opportunity for all Children in the Next Century*. The EO encourages agencies, to the extent permitted by law, to transfer computers and related peripheral equipment excess to their needs directly to schools and educational nonprofit organizations.

Contractor Acquired Property (CAP): Property acquired, fabricated, or otherwise provided by the contractor for performing a contract, and to which the Government has title, and Government-furnished property that exceeds the amounts needed to complete full performance under the entire contract.

Custodial Area: The jurisdiction of a designated Custodial Officer/Alternate Custodial Officer's responsibility for property accountability. Custodial areas are defined by Detailed Office/Organization Resource System (DOORS) codes.

Custodial Officer: An individual appointed and accepting to be responsible for the personal property within a defined custodial area (i.e., DOORS code).

Damaged Personal Property: Any property that has been impaired or otherwise reduced in usefulness and/or value, whether caused by accidental or deliberate means. In the context of this Instruction, "damage" is not the result of normal wear and tear.

Determining Authority: The Director for OMLM. The PAD directs the Board of Survey and determines the financial responsibility of individuals for loss, theft or destruction of, or damage to an item.

Disposal Condition Codes: A one-position number or letter used to report the condition of personal property.

1	NEW/UNUSED	Can be used immediately, without modifications or repairs.
4	USABLE	Shows some wear, but usable without significant repair.
7	REPAIRABLE	Unusable in its current condition but can be economically repaired.
X	SALVAGE	Value in excess of its basic material content, but repair or rehabilitation is impractical or uneconomical.
S	SCRAP	No value, except its basic material content.

Disposal of Personal Property: Processes resulting in the removal of personal property from the agency's official records, including the transfer, donation, sale of usable excess and surplus property, and the abandonment or destruction of non-usable property.

DOORS Code: A Detailed Office/Organization Resource System (DOORS) code assigned to each SSA office and component. Offices and components include, but are not limited to: Baltimore/Washington headquarters, field offices, regional offices, teleservice centers (TSC), area director offices (ADO), Offices of Hearings Operations (OHO); Office of the General Counsel (OGC); Payment Service Center offices (PSC), and other SSA offices.

Excess Personal Property: Personal property under the control of a Federal agency no longer required for an agency's needs, as determined by the agency head or designee.

Federal Agency: An executive agency or establishment in the legislative or judicial branch of the Government (except the Senate, the House of Representatives, and the Architect of the Capitol).

Government Furnished Property (GFP): Property in the possession of, or directly acquired by, the Government and subsequently furnished to the contractor for performance of a contract. Government-furnished property includes, but is not limited to, spares and property furnished for repair, maintenance, overhaul, or modification. Government-furnished property also includes contractor-acquired property if the contractor-acquired property is a deliverable under a cost contract when accepted by the Government for continued use under the contract.

GSA-PPMS: A web-enabled platform that eligible customers use to access functions of the Federal Disposal System (e.g., reporting, searching, and selecting property).

Headquarters: All agency offices and staff components physically located on the Baltimore (Woodlawn), MD campus (including all outlying buildings), as well as our Washington, D.C. headquarters located at 250 E Street.

Mixed Ownership Government Corporations: Eligible corporations with combined government and private equity listed in Title 31, United States Code (USC) 9101 (e.g., the Federal Deposit Insurance Corporation and the Resolution Trust Corporation).

National Utilization Officer (NUO) is the property officer within each federal agency who coordinates with GSA to provide user accessibility to the [Personal Property Management System](#) (PPMS). Also known as the [National Property Management Officer](#)

Non-Federal Recipient: A State, local government, nonprofit organization, and/or subsidiary of a Federal agency qualified to receive SSA property.

Non-Headquarters Office: All agency offices and staff components (e.g., field offices, teleservice centers, area director offices, hearing offices, and program service centers et al) located in the regions and Falls Church, VA and not physically located on the Baltimore (Woodlawn), MD campus (including all outlying buildings), or the International Trade Commission and Virginia Avenue buildings located in Washington, D.C.

Personal Property: Any property, excluding real property (e.g., buildings and land), including office furniture, equipment, forms, publications, and supplies.

Physical Inventory: The process of counting and recording the types and quantities of SSA's personal property item(s) physically located within a custodial area and alternate workstations associated with the custodial area.

Property Accountable Director (PAD): The Team Leader, Personal Property Team (PPT).

Property Accountable Officers (PAO): Members of the PPT and will be designated by the PAD to be accountable for particular regions and Central Office components.

Property Management: The process of acquiring, maintaining, using, and disposing of personal property

Property Managers: Agency employees authorized to assist OFLM's Personal Property Team in managing the personal property program. Property managers include property management officers (PMO), custodial officers (CO), and alternate custodial officers (ACO).

Real Property: Any interest in land, including improvements, structures, fixtures, and appurtenances, such as a satellite dish or heating/cooling units. For more information about real property policy and procedures, see AIMS, MRM, 01.01, Realty and Space Management.

Reutilize: The movement of property no longer required by the holding office or component to another office or component to fulfill a needed requirement in lieu of a new acquisition.

Sensitive Property: Property that can retain PII when powered off and weapons.

Storage Property: Property that can hold items. Examples of storage property include file cabinets, refrigerators, safes, and paper trays.

Surplus Personal Property: Excess property no longer required by the Federal Government as determined by GSA.

Survey Officer: The individual appointed Chair of the Board of Survey.

Theft: The unlawful taking and removing of personal property with intent to deprive the rightful owner of it.

United States Code (USC): Codification by subject matter of the general and permanent laws of the United States divided by broad subjects into 50 titles and published by the Office of the Law Revision Counsel of the U.S. House of Representatives.

Unrequired Property: Property no longer needed by the reporting agency component.

Utilization: Identifying, processing, reporting, and transferring excess personal property among Federal agencies.