



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

2.149.2

JULY 3, 2025

EFFECTIVE DATE

(07-03-2025)

PURPOSE

- (1) This transmits revised IRM 2.149.2, IT Asset Management - Asset Management Process Description.

MATERIAL CHANGES

- (1) Editorial changes were made to IRM 2.149.2, three naked links were updated in the following sections Training IRM 2.149.2.1.7.1 and Activities IRM 2.149.2.2.4 :
 - *UNS Operation Service Support Asset Management Web*
 - *Software Asset Management - Staff Documents*
 - *UNS Operation Service Support Asset Management Web*

EFFECT ON OTHER DOCUMENTS

IRM 2.149.2, dated May 29, 2024 is superseded.

AUDIENCE

The IT Asset Management Process Description is applicable to all employees enterprise-wide responsible for managing IT equipment, including Asset Management's stakeholders, customers, asset owners, contractors, and vendors.

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2.149.2

Asset Management Process Description

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2.149.2.1
(07-03-2025)
**Program Scope and
Objectives**

- (1) These policies define the Asset Management (AM) process and apply to all areas managing information technology assets.
- (2) **Purpose:** This document describes the formal Information Technology (IT) policy for implementing the requirements of the Information Technology (IT) AM Policy process. It provides the purpose, scope, authority, and mandates for institutionalizing this process. This policy establishes authority and responsibility for the performance of IT asset management throughout the IRS. It also establishes policies and procedures for management and control of hardware and software assets (TIER 3) throughout their lifecycle.
- (3) **Audience:** The AM Policy is applicable to all employees enterprise-wide responsible for managing IT equipment, including AM's stakeholders, customers, asset owners, contractors, and vendors.
- (4) **Policy Owner:** The office of AM within Information Technology, UNS, Operations Service Support.
- (5) **Program Owner:** Information Technology, UNS, Operations Service Support, Program Director is responsible for overseeing and managing IT assets enterprise-wide that meets the policies set forth in this IRM.
- (6) **Primary Stakeholders:** All organizations, business units and employees including contractors who have inventory responsibilities are considered stakeholders and must abide by the policies set forth in this IRM.
- (7) **Program Goals:** AM is the process responsible for tracking and reporting the value and ownership of financial assets throughout their lifecycle. AM is part of the ITIL Process. An IT asset is property or equipment that is part of the IT infrastructure, including hardware and software for IT and telecommunications data and voice that is in use, in reserve storage, or is awaiting disposal. All IRS organizations (including contractors) developing, maintaining, and controlling IT assets shall adhere to the mandates of this policy and all associated AM procedures.

2.149.2.1.1
(05-29-2024)
Background

- (1) UNS is responsible for the development, implementation and maintenance of this directive. Approval of this directive, including updates, rests with the Associate Chief Information Officer (ACIO) for UNS. All proposed changes to this directive must be submitted to the Information Technology, UNS, Operations Service Support, Asset Management organization.
- (2) A process is defined as "A set of related activities that accomplish a common goal". The document defines the process description, process goal and objectives, role definitions, policies and other process related attributes.

2.149.2.1.1.1
(05-29-2024)
Process Description

- (1) Asset Management is the process responsible for tracking and reporting the value and ownership of financial assets throughout their lifecycle. This document describes the major steps within the enterprise-wide AM Process, which include:
 - Step 1 - Manage IT Asset Plan
 - Step 2 - Process Acquired IT Asset
 - Step 3 - Deploy IT Asset
 - Step 4 - Maintain IT Asset
 - Step 5 - Dispose IT Asset

2.149.2.1.1.2
(05-29-2024)
Goal

- (1) The process goal describes a specific purpose or achievement toward which the efforts of the process are directed. Each process has a specific focus and when combined with the other processes, forms a comprehensive framework for delivering and managing services.
 - The AM Process provides direction for managing IT assets throughout their lifecycle and provides oversight for IRS AM policies, procedures and controls. In addition, this process supports lifecycle management and strategic decision-making for the IT environment.

2.149.2.1.1.3
(05-29-2024)
Objectives

- (1) Process objectives describe material outcomes that are produced or achieved by the process. The following is a list of objectives for this process:
 - Track and report the value and ownership of financial assets for improved accountability throughout the lifecycle
 - Ensure that asset purchases and disposals are properly authorized and carried out in accordance with core policy, legislation, and regulations
 - Ensure IRS assets (hardware and software) that comprise the IT infrastructure are used in the most efficient manner by managing compliance, reducing over purchases, and redeploying assets
 - Meet Industry standards for commonality in the IT Service Management (ITSM) process
 - Support the infrastructure for delivery of IT Services to the business units
 - Maintain accurate and timely asset information for decision-making and reporting purposes

2.149.2.1.2
(05-29-2024)
Authority

- (1) All proposed changes to this document must be submitted in writing, with supporting rationale, to the Information Technology, User & Network Services, Operations Service Support, AM organization in UNS.

2.149.2.1.3
(05-29-2024)
Roles and Responsibilities

- (1) Each process defines at least one role. Each role is assigned to perform specific tasks within the process. The responsibilities of a role are confined to the specific process. They do not imply any functional standing within the hierarchy of an organization. For example, the process manager role does not imply the role is associated with or fulfilled by someone with functional management responsibilities within the organization. Within a specific process, there can be more than one individual associated with a specific role. Additionally, a single individual can assume more than one role within the process although typically not at the same time.

Name	Description
Asset Management Specialists - Hardware	<ul style="list-style-type: none"> • Manage control processes and interactions for all enterprise-wide hardware financial assets and associated components • Develop policies and procedures related to the management of hardware assets as needed • Provide input for hardware asset lifecycle plans • Direct and execute hardware asset certification activities • Develop and maintain disposal policies/activities to ensure data integrity • Reconcile hardware assets receipt data for verification and audit • Process Move/Add/Change Forms • Oversee and coordinate with external/internal auditors (GAO, TIGTA, and CFO) regarding IT assets • Administrate guidelines for quality reviews • Approve user requests for access to the Repository
Asset Management Specialists - Software	<ul style="list-style-type: none"> • Manage control processes and interactions for all enterprise-wide software financial assets and associated components • Develop policies and procedures related to the management of software assets as needed • Monitor software usage • Manage software licenses • Ensure compliance with IRS software standards • Reconcile software assets receipt data for verification and audit • Oversee and coordinate with external/internal auditors (GAO, TIGTA, and CFO) regarding IT assets • Administrate guidelines for quality reviews

Name	Description
Asset Management Specialists - Disposal/Inventory Management	<ul style="list-style-type: none"> • Prepare, coordinate, and ship equipment • Maintain and review repository for inventory accuracy • Receive new IT assets • Manage the receipt of IT assets • Retire IT assets as needed • Coordinate with FMSS to complete the disposal process • Evaluate usage and stock levels for IT assets • Develop policies and procedures related to the management of depot assets as needed • Recommend changes to the inventory plan based on inventory usage and demand levels
Asset Management Specialists - Hardware Resource Management	<ul style="list-style-type: none"> • Develop, implement, execute, and modify the IRS IT Asset Plan • Manage inventory replenishments • Analyze information from multiple, disparate databases and formulate decisions and business justifications to adjust the inventory plan • Develop forecasts and projections to determine demand on the inventory investment • Analyze economic order quantities and delivery times for replenishment of the inventory items • Develop policies and procedures related to the management of depot assets as needed • Manage and control inventory levels

2.149.2.1.4
(05-29-2024)
**Program Management
and Review**

- (1) Policies outline a set of plans or courses of action that are intended to influence and determine decisions or actions of a process. Policies provide an element of governance over the process that provides alignment to business vision, mission and goals.

(2) **Process Management**

Statement:

The AM Process will have a single Process Owner and a separate Process Manager, responsible for implementation and ensuring adherence to the process. The process will be reviewed regularly to ensure that it continues to support the business requirements of the enterprise. The process will be designed and developed based on ROI to the business. Process metric will be focused on providing relevant information as opposed to merely presenting raw data.

(3) People

Statement:

Roles and responsibilities for the process must be clearly defined and appropriately staffed with people having the required skills and training. The mission, goals, scope and importance of the process must be clearly and regularly communicated by upper management to the staff and business customers of IT. All IT staff (direct and indirect users of the process) shall be trained at the appropriate level to enable them to support the process.

Rationale:

It is imperative that people working in, supporting, or interacting with the process in any manner understand what they are supposed to do. Without that understanding the AM Process will not be successful.

(4) Process

Statement:

Modifications to the AM Process must be approved by the Process Owner. The design of the process must include appropriate interfaces with other processes to facilitate data sharing, escalation and workflow. The process must be capable of providing data to support real-time requirements as well as historical/trending data for overall process improvement initiatives. The process must be fully documented, published and accessible to the various stakeholders of the process. The process will be reviewed on a periodic basis in order to ensure it continues to support organizational goals and objectives (continuous improvement). The process must include Inputs, Outputs, Controls, Metrics, Activities, Tasks, Roles and Responsibilities, Tool and Data requirements along with documented process flows. The process will be kept straight forward, rational, and easy to understand.

Rationale:

The process must meet operational and business requirements.

(5) Technology and Tools

Statement:

All tools selected must conform to the enterprise architectural standards and direction. Existing in-house tools and technology will be used wherever possible, new tools will only be entertained if they satisfy a business need that cannot be met by current in-house tools. The selection of supporting tools must be process driven and based on the requirements of the business. Selected tools must provide ease of deployment, customization, and use. The selected tools must support heterogeneous platforms. Automated workflow, notification and escalation will be deployed wherever possible to minimize delays, ensure consistency, reduce manual intervention and ensure appropriate parties are made aware of issues requiring their attention. The tools used by this process are the following:

- Hardware Asset Management Repositories
- Software Asset Management Repositories

Rationale:

Technology and tools should be used to augment the process capabilities, not become an end themselves.

2.149.2.1.5
(05-29-2024)
Program Controls

- (1) Activities involved in ensuring a process is predictable, stable, and consistently operating at the target level of performance.

2.149.2.1.5.1
(05-29-2024)
Controls

- (1) Process controls represent the policies and guiding principles on how the process will operate. Controls provide direction over the operation of processes and define constraints or boundaries within which the process must operate:

Name	Description
GAO, CFO and TIGTA Audits	Formal inspection and verification to check whether a standard or set of guidelines is being followed, that records are accurate, or that efficiency and effectiveness targets are being met.
Asset Management Policies	Policies and regulations that provide guidance for managing the IT Asset Management program.
Security Policies	Policies to ensure the confidentiality, integrity, and availability of IT assets.
Annual Inventory Certification Plan	Annual overview of hardware asset management objectives, guidelines, and activities necessary to meet IRS' annual financial audits and deliverable, including certifying the accuracy and completeness of IRS' authoritative inventory system.
Governance	Governance ensures that policies and strategy are actually implemented and that required processes are correctly followed.

2.149.2.1.5.2
(05-29-2024)
Metrics

- (1) Metrics are used for the quantitative and periodic assessment of a process. They should be associated with targets that are set based on specific business objectives. Metrics provide information related to the goals and objectives of a process and are used to take corrective action when desired results are not being achieved and can be used to drive continual improvement of process effectiveness and efficiency.

- (2) Management will regularly set targets for process performance, gather quantifiable data related to different functions of the AM Process, and review that data in order to make informed decisions and take appropriate corrective action, if necessary.

2.149.2.1.5.3
(05-29-2024)
Tailoring Guidelines

- (1) The tailoring guidelines identify the allowable variations of the IT organization's standard process as needed for adjustments (adding, deleting, modifying) relative to specific operational or functional needs of another organization. Process tailoring is about roles and procedures, not the standard process or major activities defined in this process. All tailoring request, with supporting rationale, must be submitted in writing to and approved by the AM Process owner.

2.149.2.1.6
(05-29-2024)
**Terms/Definitions/
Acronyms**

- (1) Definitions of AM's terms and acronyms.

2.149.2.1.6.1
(05-29-2024)
Terms and Definitions

- (1) The definitions listed below are some commonly used terms and are provided as an aid to understanding IT AM.

Term	Definition
Agreed Life	An asset is designed to perform a function at an acceptable level for a predetermined amount of time according to the manufacturer's lifecycle. It ensures that the defined services for the asset are met to provide the level of service required by the customer, in terms of quality and reliability.
Annual Inventory Certification Plan	Annual overview of hardware asset management objectives, guidelines, and activities necessary to meet IRS' annual financial audits and deliverable including certifying the accuracy and completeness of IRS' authoritative inventory system.
Artifact	A work product created by a process or procedure step, e.g., plans, design specifications, etc.
Asset	Any resource or capability. Assets of a service provider include anything that could contribute to the delivery of a service. Assets can be one of the following types: management, organization, process, knowledge, people, information, applications, infrastructure, and financial capital.

Term	Definition
Audit	Formal inspection and verification to check whether a standard or set of guidelines is being followed, that records are accurate, or that efficiency and effectiveness targets are being met. An audit may be carried out by internal or external groups.
Certification	Issuing a certificate to confirm compliance to a standard. Certification includes a formal audit by an independent and accredited body.
Depot	A centralized storage area for In Stock IT equipment.
Entry Criteria	The elements and conditions (state) necessary to trigger the beginning of a process step.
Exit Criteria	The elements or conditions (state) necessary to trigger the completion of a process step.
Hardware Asset	Property meeting certain financial and security criteria that is part of the information technology infrastructure and represents a physical piece of computing electronic equipment.
Incident	The Enterprise Service Desk logs and tracks reported incidents. The incident will be assigned to a service provider for resolution.
Information Technology (IT)	The use of technology for the storage, communication, or processing of information. The technology typically includes computers, telecommunications, applications and other software. The information may include business data, voice, images, video, etc. Information Technology is often used to support business processes through IT services.
Information Technology Infrastructure Library (ITIL)	A set of best practice guidance for IT service management. ITIL consists of a series of publications giving guidance on the provision of quality IT services, and on the processes and facilities needed to support them.
IT Asset	Property or equipment that is part of the information technology infrastructure, including hardware and software for IT and telecommunications data and voice that is in use, in reserve storage, or is awaiting disposal.
IT Asset Life cycle	A series of states connected by allowable transitions. The set of business practices that join financial, contractual, and inventory functions to support the management from acquisition to disposition for hardware and software found in the IT environment.

Term	Definition
IT Asset Plan	A tactical plan for managing an organization's infrastructure and assets to deliver an agreed standard of service.
IT Equipment Profile	The standardized list of IT equipment given to each employee based upon their occupation in the IRS.
Knowledge Article	Shared information or instructions contained in a centralized database.
License Position	An organization view, which identifies whether software is under-licensed (at risk of a compliance audit) or over-licensed (wasting money on unnecessary software purchases), assisting in managing license compliance.
Move/Add/Change Form	A form used to document the status (location/assignment/user) of any piece of hardware (IT asset). It is used to update the repository.
Process	A structured set of activities designed to accomplish a specific objective. A process takes one or more defined inputs and turns them into defined outputs. A process may include any of the roles, responsibilities, tools, and management controls required to reliably deliver the outputs. A process may define policies, standards, guidelines, activities, and work instructions if they are needed.
Process Owner	A role responsible for ensuring that a process is fit for purpose. The process owner's responsibilities include sponsorship, design, change management, and continual improvement of the process and its metrics. This role is often assigned to the same person who carries out the process manager role, but the two roles may be separate in larger organizations.
Quality Reviews	Quality reviews ensure compliance to asset management policies.
RACI	(Responsible - Accountable - Consulted - Informed) This model is used to help define roles and responsibilities, instructions for the activities used in the Hardware Asset Management procedures.
Recipient	The point of contact (POC) receiving the IT asset.
Request for Change (RFC)	A formal proposal for a change to be made (work request). An RFC includes details of the proposed change, and may be recorded on paper or electronically.

Term	Definition
Rogue Asset	An unmanaged asset which appears amidst a population of managed assets. This can happen as a result of non-compliance with the policies concerning asset control and barcoding.
Service Request	A request from a user for information, or advice, or for a standard change or for access to an IT service. For example to reset a password, or to provide standard IT services for a new user. Service requests are usually handled by Enterprise Service Desk, and do not require an RFC to be submitted.
Software Asset	Property meeting certain financial and security criteria that is part of the information technology infrastructure and software installed on personal computers, laptops, desktops, servers, mainframes, network and mobile devices.
TIER 3 Software (Micro)	Personal computers such as Desktop PC, Laptop PC, etc.
Tool	Job aid for a specific purpose, e.g., checklist, template, application, etc.

2.149.2.1.6.2
(05-29-2024)

Acronyms

- (1) The abbreviations and acronyms include an alphabetical listing of some commonly used terms in IT AM.

Acronyms	Definition
ACIO	Associate Chief Information Officer
AM	Asset Management
ARM	Asset Management Reports
CIO	Chief Information Officer
CFO	Chief Financial Officer
CMMI	Capability Maturity Model Integrated
COE	Common Operating Environment
EOL	End of Life
FMSS	Facilities Management and Security Services (formerly Real Estate and Facilities Management (REFM))
GAO	Government Accountability Office
IRM	Internal Revenue Manual
IRS	Internal Revenue Service

Acronyms	Definition
IT	Information Technology
ITIL	Information Technology Infrastructure Library
ITSM	IT Service Management
PD	Process Description
PMI	Project Management Institute
POC	Point of Contact
RACI	(Responsible, Accountable, Consulted, and Informed) This model is used to help define roles and responsibilities, instructions for the activities used in the Hardware Asset Management procedures
RFC	Request For Change
ROI	Return On Investment
SAM	Software Asset Management
TIGTA	Treasury Inspector General for Tax Administration
UNS	User & Network Services

2.149.2.1.7
(05-29-2024)

Related Resources

(1) The following lists the regulatory documents that validate the AM Policy:

- Public Law 89-306, Automated Data Processing Equipment
- Office of Management and Budget (OMB) Circular A-123, Management's Responsibility for Internal Controls
- Treasury Department Publication 32-01, Accounting Principles and Standards OMB Circular A-127, Financial Management Systems
- Public Law 101-576, Chief Financial Officers Act of 1990
- Executive Order 12999, Educational Technology: Ensuring Opportunity for All Children in the Next Century
- Public Law 104-106, Clinger-Cohen Act of 1996, formerly Information Technology Reform Act of 1996
- IRM 1.2.1 - Servicewide Policy Statements and IRM 1.2.2 - Servicewide Delegations of Authority, to see information technology activities such as Policy Statement 2-93 (formerly P-1-229)
- Delegation Order 1-41 Delegation Order MITS-2-1-1, Authority to Approve IT Resources
- Policies and Procedures Memorandum No. 46.5, Evidentiary Documentation in Support of Receipt and Acceptance
- IRM 10.8, Information Technology(IT) Security
- IRM 1.14.4, Personal Property Management, Facilities Management and Security Services
- IRM 1.35.6, Administrative Accounting, Property and Equipment Accounting
- IRM 2.21, Shopping Cart Processing for Information Technology Products and Services

- IRM 1.15, Records and Information Management
- IRM 6.800, Employee Benefits
- IRM 2.127, Testing Standards and Procedures
- National Institute of Standards and Technology Special Publication 800-53, Recommended Security Controls for Federal Information Systems and Organizations (Aug. 2009)
- Treasury Directive Publication 85-01, Treasury IT Security Program (Nov. 3, 2006)
- Executive Order, Department of the Treasury Directive 85-02, Software Piracy Policy (May 4, 2010)
- Executive Order 13103 (Sep. 30, 1998), Computer Software Piracy
- Executive Order 13589, Promoting Efficient Spending (Nov. 09, 2011)
- Public Law 113-291, National Defense Authorization Act, Federal Information Technology Acquisition Reform Act, (FITARA) (Dec. 2014)
- “OMB issued Memorandum M-16-12, dated June 2, 2016:” Improving the Acquisition and Management of Common Information Technology: Software Licensing
- Public Law 114-210, Megabyte Act of 2016, Making Electronic Government Accountable by Yielding Tangible Efficiencies Act of 2016 (July 29, 2016)
- Asset Management - Enterprise-wide Software User Guide
- Asset Management - UNS Software User Guide
- Asset Management - Hardware User Guide
- General Services Administration Bulletin Federal Management Regulation (FMR) B - 34, Disposal of Federal Electronic Assets
- Memorandum, dated July 26, 2011 and signed by CTO for IRS Computer Room and Ownership and Management which assigns ownership of all Computer Rooms to Enterprise Operations

2.149.2.1.7.1
(07-03-2025)
Training

- (1) Process training involves training all stakeholders about key processes that are crucial for an organization to deliver business objectives. Training provides clarity to employees on a set of procedures that needs to be carried out as part of the process and the best possible way to do them. List below the training resources available for this process:
 - Data Management
 - Asset Repository
 - Technical Writing
 - Information Technology Infrastructure Library (ITIL)
 - Data Analysis
 - Problem Solving
 - Communications
- (2) The above bullet list are types of training that are recommended for the Asset Management Process.
- (3) Refer to Asset Management User Guides located on the SharePoint at *User & Network Services (UNS) Operation Service Support Asset Management Web* for specifics related to training. Also, see the Integrated Talent Management (ITM) for applicable Asset Management courses.
- (4) Additionally, for more specific Software Asset Management (SAM) refer to their SharePoint site at *Software Asset Management - Staff Documents* which lists related resources to assist with the program.

2.149.2.2

(05-29-2024)

Process Workflow

- (1) A workflow consists of Activities and Tasks, Inputs and Outputs, Roles, and Flow Diagrams. It describes the tasks, procedural steps, organizations or people involved, required input and output information, and tools needed for each step of the process.

2.149.2.2.1

(05-29-2024)

Main Process Diagram

- (1) Asset Management Workflow for Hardware & Software:

Information Technology Asset Management Flow Diagram for Hardware & Software

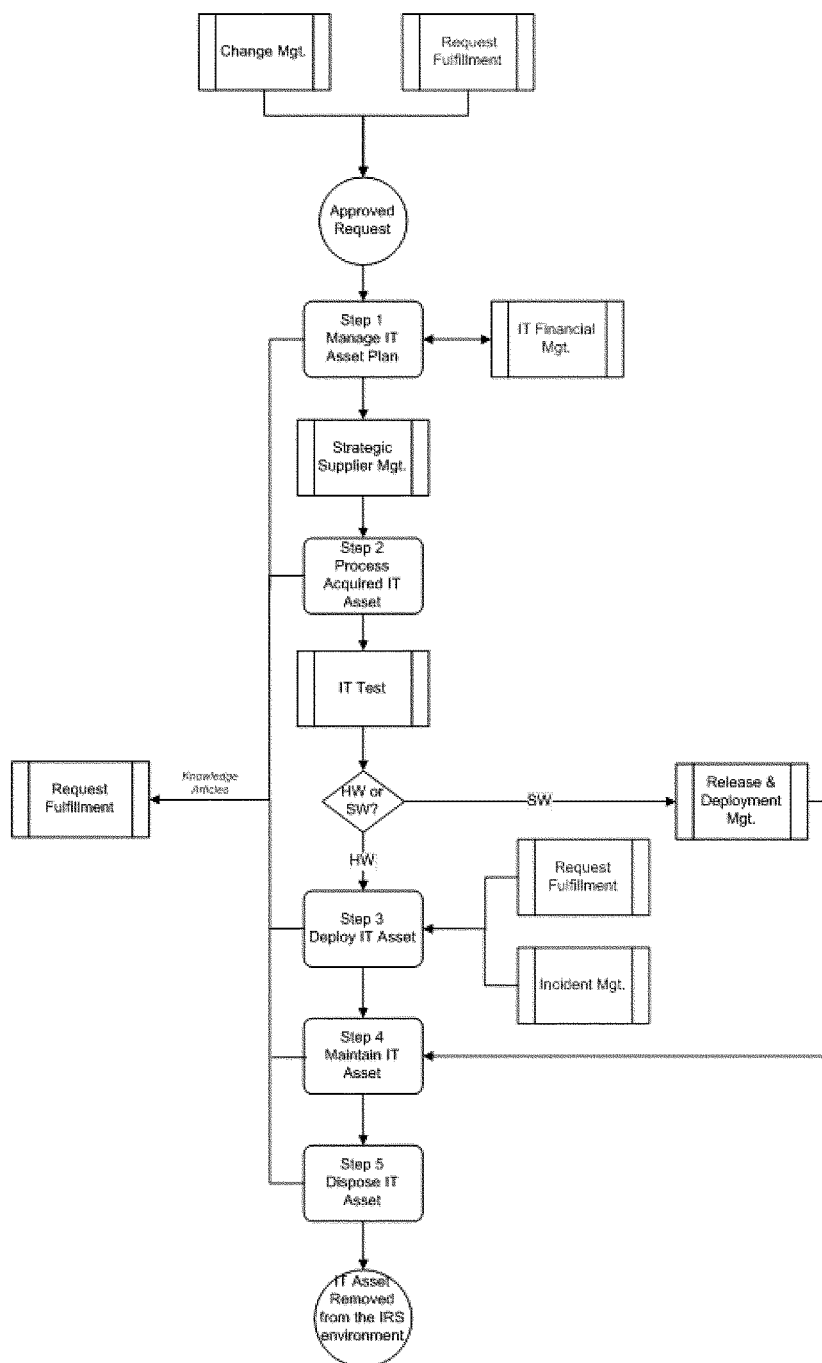


Figure 2.149.2-1

Figure 2.149.2-1

2.149.2.2.2
(05-29-2024)
Inputs

- (1) Process inputs are used as triggers to initiate the process and to produce the desired outputs. Users, stakeholders or other processes provide inputs. The following is a list of inputs for this process:

Name	Description	Supplier
Policies and Directives	The guidelines to manage the IT Asset Management program and ensure financial assets are accurately tracked in the authoritative repositories.	Asset Management
Service Request	A request from a user for information, or advice, or for a standard change or for access to an IT Service.	Request Fulfillment
Incident	An unplanned interruption to an IT Service or a reduction in the quality of an IT Service.	Incident Mgt
Request for Change (RFC)/ Work Request	A formal proposal for a change to be made (work request). An RFC includes details of the proposed change, and may be recorded on paper or electronically.	Change Mgt
IT Equipment Profile	The standardized list of IT equipment given to each employee based upon their occupation in the IRS.	Service Level Mgt
Budget Information	The financial data used to support the IT Asset Plan.	IT Financial Mgt
IT Asset	The property or equipment that is part of the information technology infrastructure, including hardware and software for IT and telecommunications data and voice that is in use, in reserve storage, or awaiting disposal.	Strategic Supplier Mgt, Asset Mgt
Move/Add/Change Form	A form used to document the status (location/assignment/user) of any piece of hardware (IT asset). It is used to update the repository.	Asset Mgt, Stakeholders
Purchase Documentation	The types of purchase documentation include requisitions award, shipping information, vendor quotes and contracts.	Strategic Supplier Mgt

Name	Description	Supplier
Acquisition Documentation	The types of acquisition documentation include transfers from another federal agency and/or seized and forfeited assets.	Asset Mgt, Stakeholders
Repository	The database that stores, maintains, and tracks the value and ownership of assets.	Asset Mgt
Asset Management Reports	The reports generated to provide data on the asset management inventory.	Asset Mgt, Supplier Mgt
Maintenance and Warranty Agreements	The warranties are agreements which call for the replacement or repair of hardware assets at no additional charge. Maintenance agreements ensure continued operation of an IT asset by providing preventive and remedial services, including support and installation.	Strategic Supplier Mgt
Financial/ Compliance Audits (GAO, TIGTA, CFO)	The formal inspection and verification to check whether a standard or set of guidelines is being followed, that records are accurate, or that efficiency and effectiveness targets are being met.	Audit Mgt
Testing Documentation	The documentation of testing process and results.	Release & Deployment Mgt
Annual Inventory Certification Plan	The annual overview of hardware asset management objectives, guidelines, and activities necessary to meet IRS' annual financial audits and deliverable including certifying the accuracy and completeness of IRS' authoritative inventory system.	Asset Mgt
Disposal Documentation	The documents used to support the disposal of hardware IT assets.	Asset Mgt, Strategic, Supplier Mgt, FMSS

2.149.2.2.3
(05-29-2024)
Outputs

- (1) Each process produces tangible outputs. These outputs can take the form of products or data and can be delivered to a user or stakeholder, or, they can be used as inputs to other processes. Outputs are measurable in terms of quantity and quality.

Name	Description	Recipient
IT Asset Plan	A tactical plan for managing an organization's infrastructure and assets to deliver an agreed standard of service.	Strategic Supplier Mgt, IT Financial Mgt
Request for Change (RFC)/ Work Request	A formal proposal for a change to be made (work request). An RFC includes details of the proposed change, and may be recorded on paper or electronically.	Change Mgt
Budget Information	The financial data used to support the IT Asset Plan.	IT Financial Mgt
Repository	An asset record is updated within the Repository.	Asset Mgt
Asset Management Reports	The reports generated to provide data on the current asset management inventory.	Asset Mgt, Strategic, Supplier Mgt, Stakeholders
Deployed IT Asset	The IT asset is delivered and set up for the recipient.	Asset Mgt, Stakeholders
Service Request	A request from a user for information, or advice, or for a standard change or for access to an IT Service has been fulfilled and closed.	Request Fulfillment, Asset Mgt
Incident	The resolution of an unplanned interruption to an IT Service or a reduction in the quality of an IT Service.	Incident Mgt, Asset Mgt
Disposal Documentation	The documents used to support the disposal of hardware IT assets.	Asset Mgt, Strategic, Supplier Mgt, FMSS

Name	Description	Recipient
Knowledge Article	The shared information or instructions contained in a centralized database.	Knowledge Mgt, Stakeholders

2.149.2.2.4
(07-03-2025)
Activities

- (1) An activity is a major unit of work to be completed in achieving the objectives of the process. A process consists of a sequence of related activities that transforms inputs into outputs and performed by the roles defined in the process. Identify the activities in the process and provide a brief description. The activities must correspond with the high-level process flow diagram above.
- (2) Additional instructions for the following steps are found in the Asset Management – User Guides found on the Asset Management SharePoint at *UNS Operation Service Support Asset Management Web*:

ID	Name	Description
Step 1	Manage IT Asset Plan	Plan for new IT asset purchases or replacement of existing IT assets
Step 2	Process Acquired IT Asset	Ensure new and transferred IT assets are accounted for in the IRS authoritative repository
Step 3	Deploy IT Asset	Provide IT assets needed to the recipient. Some of these activities include identifying assets and entering asset information in a repository Note: This process step is for Hardware IT assets only. Software IT assets are deployed in the Release & Deployment process.
Step 4	Maintain IT Asset	Inventory, count and track assets, monitor usage, and manage warranties (hardware) /contracts for maintenance and support. Some of these activities include monitoring the useful life of an asset, quality reviews and continuous evaluations to improve services for future modification. Each activity may have a different trigger(s) that starts the process

ID	Name	Description
Step 5	Dispose IT Asset	Remove IT assets from active inventory and make them unavailable for use. Some of these activities include determining IT assets reaching end of life and performing disposal activities

