

SBA

SOP 00 13 5

**Personal Property
Management Program**

Office of Business Operations

U.S. Small Business Administration



**SMALL BUSINESS ADMINISTRATION
STANDARD OPERATING PROCEDURE**

National

SUBJECT:

S.O.P.

REV

Personal Property Management Program

SECTION

NO.

00

13

5

INTRODUCTION

1. Purpose. To update guidelines and procedures for the acquisition, receipt, storage, distribution, use, and disposal of SBA personal property.
2. Personnel Concerned. All SBA Employees and Contractors
3. Directives Canceled. SOP 00 13 4.
4. Originator. Office of Business Operations
Division of Administrative Services (DAS)

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EFFECTIVE DATE

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AUG 1, 2007

Director, Office of Business Operations

PAGE

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SBA Form 989 (5-90) Ref: SOP 00 23

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Chapter 1

General

1. What is the Purpose of this Standard Operating Procedure?

The purpose of this SOP is to provide employees guidelines and procedures for the management, use, and disposal of agency personal property.

2. What is Personal Property?

Personal property is everything that is owned by SBA and is not real estate. In this SOP the terms property and personal property are used interchangeably.

3. What Laws and Regulations Cover Property Management?

The Federal Property and Administrative Services Act of 1949, (40 U.S.C. 101 et seq.) and its implementing regulations, Federal Property Management Regulations (FPMR), 41 CFR Chapter 101, and Federal Management Regulations 41 CFR Chapter 102, Parts 102-1 through 102-220, provides the Government a system for:

- a. Procurement and supply of personal property;
- b. Use of available property; and
- c. Disposal of excess property.

4. Who has the Authority to Issue Directives Relating to Property Management?

The Director, Office of Business Operations has the authority to issue directives and changes to this SOP.

5. Who is Covered by this SOP?

With the exception of paragraphs 7, 8, and 15 of Chapter 4, this SOP covers SBA employees only.

Chapter 2

Personal Property Management

1. What is Personal Property Management?

Property management is a system for acquiring, maintaining, safeguarding, and disposing of SBA personal property.

2. Who is Responsible for the Property Management Program?

The Director, Office of Business Operations is responsible for developing and implementing guidelines and procedures for management of the SBA's personal property. He/She serves as the Property Management Officer for SBA.

3. What is the Property Management Officer's Role?

The Property Management Officer is responsible for:

- a. Ensuring compliance with the Federal Property Management Regulations (FPMR);
- b. Keeping the purchase of new property to a minimum by making GSA excess property available;
- c. Ensuring maximum use of SBA personal property; and
- d. Ensuring prompt reporting of excess property for use elsewhere.

4. What are the HQs Division Chief's and Field Office Head's Roles?

Regional administrators, district directors, disaster area directors, and Headquarters' division chiefs are designated property control officers for their respective areas of responsibility. As a Property Control Officer, you must:

- a. Ensure that the property within the control of your respective area of responsibility is properly safeguarded;
- b. Appoint Accountable Officers (AO) (usually administrative personnel) and require such officers conduct a physical inventory of the personal property in their area of responsibility;

- c. Review, approve, and submit the SF 110, “*Annual Report of Inventory*,” (Appendix 2) to Headquarters Division of Administrative Services (DAS), Facilities Management Branch (FMB) by December 1st of each year;
- d. Review the status of property checked out to employees annually;
- e. Review and sign the SF 120, “*Report of Excess Personal Property*,” (Appendix 3) in block 8, and forward to DAS/FMB for approval; and,
- f. Ensure that all SBA property is returned when an employee leaves SBA. Field Office Heads should indicate compliance by signing and dating SBA Form 78, “*Separation Checklist*,” (Appendix 4). Headquarters Division Chiefs should initial SBA Form 78 and forward it to the FMB for concurrence on the following items: Identification/Fascard, Property/Equipment and Office/Furniture-Keys. Once you have obtained all required clearances, forward to the Office of the Chief Human Capital Officer.
- g. Complete SBA Form 386, “*Report of Property for Survey*,” (Appendix 5) when property is lost, stolen, or destroyed;

5. What are the Responsibilities of an Accountable Officer?

Accountable Officers must:

- a. Affix barcodes to SBA personal property valued at \$250 or more as well as the following items and enter the barcoded property into the Fixed Assets Accountability System¹ (FAAS):
 - (1) Pagers;
 - (2) Cellular phones;
 - (3) Cameras;
 - (4) Voice recorders;
 - (5) Electronic organizers/PDAs;
 - (6) Electronic pointers; and,
 - (7) TVs.
- b. Conduct an annual physical inventory of SBA personal property that has a value of \$250 or more and the items listed in (a) above;

¹ Fixed Asset Accountability System (FAAS) is an agency-wide inventory system for accounting for property.

- c. Complete SF 120, "Report of Excess Personal Property," (Appendix 3) when personal property is excessed, donated or transferred and forward it to the FMB for approval;
- d. Update the FAAS routinely when property is lost, stolen, destroyed, excessed, transferred, donated, loaned, or sent out for repair;
- e. Use SBA Form 654, "*Accountable Property Receipt*," (Appendix 6) to control assignment of SBA personal property to properly safeguard the following items:
 - (1) Audiovisual equipment;
 - (2) Cameras;
 - (3) Portable dictating and transcribing machines;
 - (4) Cellular phones;
 - (5) Slide projectors;
 - (6) Tape recorders;
 - (7) Laptop computers;
- f. Generate queries and reports; and,
- g. Maintain machine repair records.

6. What happens if there is a Discrepancy Between What is Inventoried and What is in the Fixed Assets Accountability System (FAAS)?

If the Accountable Officer cannot locate individual items, he/she must complete SBA Form 386, "Report of Property for Survey" for the Property Control Officer's signature. The property control officer must forward SBA Form 386 to the Chairperson, Board of Survey, for action. (See Chapter 5 for additional information.)

7. Can Employees Checkout SBA Property for Official Use?

Yes. Employees must:

- a. Complete and sign SBA Form 654, "Accountable Property Receipt," (Appendix 6) and forward it to the property control officer for approval;
- b. Complete SBA Form 2258, "*Property Pass*," (Appendix 7) prior to removing equipment, with the exception of cellular phones, blackberries, pagers, and

electronic organizers (PDAs), from the building and forward it along with SBA Form 654 to the Chief, FMB for approval. Field Office employees must complete SBA Form 2258 and forward it along with SBA Form 654 to the Field Office Head for approval. A copy of the property pass should be forwarded to building security, if applicable.

All employees are responsible for properly safeguarding all SBA personal property. If an employee fails to properly account for SBA property, he/she may be liable for the repair and/or replacement costs, and/or subject to disciplinary action. (See Appendix 5, SOP 37 52 2, "Adverse and Disciplinary Actions,")

8. What are the Procedures for Sending Equipment Out for Repair?

The Property Control Officer must obtain an SBA Form 2258, "Property Pass," for the vendor from the Facilities Management Branch or the Field Office Head, respectively and ensure the Accountable Officer updates the FAAS system to indicate that the equipment is out for repair and with whom. A copy of the pass should be forwarded to building security, if applicable, to facilitate removal from the building.

Chapter 3

Excess Property

1. What is Excess Property?

Excess property is personal property under the control of any Federal agency that is no longer needed to carry out the functions of official programs, as determined by the agency head or designee. (See FMR Chapter 102, Part 36)

2. What are the Procedures for an Interagency Transfer to Acquire Excess Property?

The Division Chief, Division of Administrative Services and Field Office Heads must:

- a. Contact the GSA Federal Supply Service Bureau (FSSB) serving the area or other Federal agencies for excess property;
- b. Complete the Standard Form 122, "*Transfer Order Excess Personal Property*," (Appendix 8) after identifying desired property;
- c. Obtain approval from DAS before forwarding the SF 122 to the holding agency² (Field Only); and,
- d. Arrange for transfer of property with other Federal agencies.

Transfers between Federal agencies are normally made without charge for the property itself. Care, handling, and transportation costs are paid by the receiving agency.

3. What are the Procedures for Disposing of Excess Property?

The Property Control Officer must:

- a. Determine that the property can no longer be used to carry out the mission of the office;
- b. Notify DAS/FMB to determine if other offices of SBA can utilize the property proposed for excess;
- c. Determine if another Federal agency can utilize the property that the office no

² Holding Agency means the Federal agency having accountability for and general possession of the property involved.

longer needs;

- d. Prepare and submit an SF 120, "Report of Excess Personal Property," to the Chief, FMB for approval;
- e. Submit the approved SF 120 to the GSA regional office servicing the respective geographic area for utilization, donation or sale. In Headquarters, the DAS will submit the approved SF 120 to the GSA office serving the Washington Metropolitan Area;
- e. Ensure the Accountable Officer updates the FAAS system, i.e., transfers property no longer needed into the "Excess Property" Folder; and
- f. Ensure that the Accountable Officer removes all SBA-affixed markings such as bar codes prior to personal property permanently leaving the agency.

4. What happens after GSA Receives SBA's Report of Excess Personal Property?

- a. After receipt of the SF 120, GSA makes the property available through GSA Xcess for other Federal and State agencies for 21 days.
- b. After the expiration of the 21-day period, and if there is no Federal interest, but there is competition among state agencies, GSA will allocate the property.
- c. If there is no interest, GSA offers the property for sale to the general public for a maximum of 45-days.

NOTE: The holding agency maintains the personal property until GSA issues a decision.

5. What happens if GSA Decides that the Property Cannot be Utilized, Donated, or Sold?

GSA will issue the Division Chief, Division of Administrative Services (DAS) and/or Field Office Head a decision authorizing the destruction or abandonment of the property.

6. May We Abandon or Destroy Excess Personal Property without Reporting it to GSA?

Yes. Excess personal property may be abandoned or destroyed when the Property Control Officer makes a written finding that the property has no commercial value or the estimated cost of its continued care and handling would exceed the estimated proceeds from its sale and the Chief, FMB has approved. An item has no commercial value when it has neither utility nor monetary value (either as an item or as scrap.) The Property Control Officer must include the following in the written finding (See Appendix 9):

- a. A detailed description of the property, condition, and total acquisition cost;
- b. A statement describing the proposed method of destruction or the abandonment location; and,
- c. A statement declaring that the property has no commercial value or the estimated cost of its continued care and handling would exceed the estimated proceeds from its sale.

7. Is SBA Required to Give Public Notice of Proposed Abandonment or Destruction of Property?

Yes. The Property Control Officer must give public notice of intent to abandon when he/she has determined that:

- a. The value of the property is so little or the cost of its care and handling is so great that its retention for advertising for sale is clearly not economical;
- b. Abandonment or destruction is required because of health, safety, or security reasons; and
- c. The original acquisition cost of the item is less than \$500. (See section 41 CFR 102-36.330(c))

8. What Information is Included in the Public Notice?

The Property Control Officer must provide:

- a. A general description of the property;
- b. The date and location of the abandonment or destruction action;
- c. An offer to donate the property to public bodies (see 41 CFR Part 102-36.320); and
- d. An offer to sell the property in accordance with 41 CFR Part 101-45.

9. Where must the Public Notice be Posted and for How Long?

The Property Control Officer must post the public notice in public places or publish the notice in an organizational newsletter or local newspaper for at least 7 days.

10. Can Surplus Computer Related Equipment be Donated to Educational

Institutions?

Under the provisions of Executive Order 12999, Federal agencies may transfer or donate excess educational-related equipment to schools and non-profit organizations³ for educational and research activities, including community-based educational organizations. A school is eligible to participate if it is a public, private, parochial, or home school serving pre-kindergarten through grade 12 students. Day care centers must provide a state approved preschool curriculum in order to participate. Schools and non-educational non-profits must also be located within the United States of America or its territories to be eligible. An educational non-profit must meet the following criteria:

- a. Serve pre-kindergarten through grade 12;
- b. Be tax-exempt under section 501(c) of the U.S. tax code; and
- c. Operate exclusively for educational purposes.

11. What Type of Computer Related Equipment can be Transferred to Schools and Educational Non-profit Organizations?

SBA may donate computers and related peripheral equipment, such as printers, modems, routers, and servers to include appropriate telecommunications equipment. Computer software may be transferred after the Property Control Officer receives written approval from the software vendor or licensor.

12. What is the Procedure for Donating Computer Related Equipment to Eligible Participants?

The AO must:

- a. Contact the Office of the Chief Information Officer (OCIO), Office of Planning and Technology Assets Management, in Headquarters to ensure that no SBA office needs the excess computer equipment and inform OCIO of all devices and software installed on the computer, brand, chip speed, random access memory (RAM) amount, and hard disk size;
- b. Contact local schools or non-profit organizations to see if there is an interest in the computer equipment and obtain the following on the organization's letterhead:
 - 1) A letter of interest from the organization; and
 - 2) Written documentation that the organization serves pre-

³ A non-profit organization is an organization that is not organized for profit and exempt from Federal income tax under section 501 (c) of the Internal Revenue Code (26 U.S.C. 501).

kindergarten through grade 12; is tax-exempt under section 501(c) of the U.S. tax code; and operates exclusively for educational purposes. Forward it, an SF 120, and the letter of interest to the Chief, FMB for approval.

- c. Upon approval of the SF 120, forward it to the local GSA office;
- d. Ensure the Information Technology Specialist cleans the computer hard drive of all data;
- e. Update property in the FAAS system as a “Donation” and transfer property into the office’s Excess Property Folder for removal by the Agency Property Accountable Officer in HQs; and
- f. Obtain written acknowledgement of receipt of property from the recipient organization and forward a copy to Chief, FMB.

Chapter 4

Motor Vehicle Management

1. What Laws and Regulations Cover Motor Vehicle Management?

- a. 40 U.S.C. 17502-17509
- b. 41 CFR Part 102-5; and
- c. Chapter 2 Part 34 “Federal Management Regulations” (41 CFR Part 102-34)

2. What is the Office of Business Operation’s Responsibilities for Motor Vehicle Management?

The Office of Business Operations is responsible for:

- a. Establishing and implementing standards and procedures for the acquisition, use, operation, service, storage, reporting, and management of motor vehicles to ensure overall reduction of Federal motor vehicle costs according to 40 U.S.C. 901;
- b. Developing a system of reporting and coordinating SBA’s annual requirements for interagency fleet management vehicles;
- c. Implementing GSA standards and safety regulations;
- d. Administering fleet reporting through the Federal Automotive Statistical Tool (F.A.S.T.). Information is provided through F.A.S.T. for the use of General Services Administration (GSA), Department of Energy (DOE) and Office of Management and Budget (OMB);
- e. Providing guidelines for Agency officials concerning the Motor Vehicle Management Program;
- f. Directing the annual allocation of GSA Interagency Fleet Management Center vehicles for SBA use through liaison with GSA; and
- g. Procuring Government-owned, leased, or rented vehicles for Headquarters with the exception of the Office of the Inspector General.

3. What are the Field Office Heads' Responsibilities for Motor Vehicle Management?

Field Office Heads must:

- a. Ensure compliance with the Motor Vehicle Management regulations and policy;
- b. Ensure that each operator of a Government-owned vehicle is familiar with the contents of the "Motor Vehicle Operator's Packet" issued with each GSA Interagency Fleet Management Center vehicle, or with the owner's manual for a leased vehicle;
- c. Ensure that operators of Government-owned, leased or rented vehicles have a valid operators license; and
- d. Ensure the Property Accountable Officer completes and submits the FAST Report. (See Chapter 4, paragraph 28)

4. How do Field Office Heads Acquire Motor Vehicles?

Field Office Heads must:

- a. Obtain written approval to acquire GSA Motor Vehicles from the Division Chief, DAS.
- b. Contact regional or local Interagency Fleet Management Systems (IFMS) operated by the U.S. General Services Administration (GSA) to fulfill authorized requirements for passenger-carrying motor vehicles.
- c. Contact local car dealerships on the GSA schedule and/or rental companies for a commercial vehicle.
- d. Check to see that vehicles obtained from GSA for official purposes bear the standard fleet management identification and are shipped with official U.S. Government tags.

5. What Type of Vehicle May Field Office Heads Acquire?

Field Office Heads must:

- a. Select a midsize (class III) or smaller sedan that achieves maximum fuel efficiency;
- b. Limit vehicle body size, engine size, and optional equipment to what is essential for meeting SBA's mission; and
- c. Obtain the Division Chief's, DAS approval to purchase or lease any vehicle larger than Class III Sedan. Large (class IV) sedans are only approved when such a vehicle

is absolutely essential to SBA's mission

6. What License Plates must SBA Vehicles have?

GSA provides U.S. Government Official plates on all vehicles leased through them. When vehicles are leased commercially, Field Office Heads must purchase SBA personalized official U.S. plates from UNICOR through DAS.

7. Who may Drive/Operate a Government Vehicle?

- a. SBA employees may use an SBA vehicle for official purposes only provided the employee has:
 - (1) A valid motor vehicle operator's license; and
 - (2) An SBA employee identification badge.
- b. Government contractors may drive an SBA vehicle provided:
 - (1) The contractor has a valid operator's license;
 - (2) The terms of the contract allow for such use; and
 - (3) The vehicle is used to perform the contract.

8. Can Non-SBA Employees Ride in a Government Vehicle?

Yes. The Division Chief, DAS and Field Office Heads may authorize non-employees to ride as passengers in government vehicles to conduct official business.

9. Who may Approve the Use of a Government Vehicle?

In Headquarters, the Division Chief, DAS, or designee approves the use of vehicles for official purposes. The Field Office Head approves the use of SBA vehicles in the field.

10. When is After-Hours Use of a Government Vehicle Permitted?

An employee on official travel may use an owned or leased Government vehicle for transportation between places of official business, temporary lodging, drug stores, medical facilities, food service facilities, barber or beauty shops, places of worship, and/or laundry and dry cleaning establishments.

11. May I Use a Government Vehicle for Home-to-Work Transportation?

Generally, no. However, the Administrator may authorize home-to-work transportation for:

- a. Employees engaged in Field⁴ work;
- b. Employees faced with a clear and present danger;
- c. An emergency; or
- d. A compelling operational consideration.

When making a determination, the Administrator will consider:

- a. The location of the employee's home in proximity to his/her work and to the location where non-TDY travel is required; and
- b. The efficiency and economy of the Government.

12. What is the Procedure for Requesting a Home-to Work Determination?

Management Board members and District Directors must submit such requests in writing to the Office of Business Operations for the Administrator's determination. The request must contain:

- a. Employee Job title;
- b. Position Series number;
- c. Operational level; and,
- d. Reason for authorized home-to-work transportation.

13. Can an Employee Engaged in Field Work Use a Government Vehicle for Home-to-Work Transportation before Receiving a Home-to-Work Determination?

No. Further, employees engaged in Field work must request in advance and in writing via SBA Form 1689, *"Request for Authorization to Use a Government Vehicle from*

⁴ Field Work is official work requiring an employee's presence at various locations other than their regular place of work.

Home-to-Work for Field Work,” (Appendix 10) from the appropriate Agency official each time they use a Government vehicle under the home-to-work provision.

14. Who may Approve Requests for Use of a Government Vehicle from Home-to-Work for Employees Whose Positions have been Designated for Field Work?

The following officials may approve requests for use of a Government vehicle from home-to-work for those employees whose positions the Administrator approved for fieldwork:

- (a) Associate Administrator for Management & Administration or Director, Office of Business Operations for Headquarters employees, except Office of Inspector General (OIG) and Office of Disaster Assistance (ODA) employees;
- (b) Inspector General or designee for OIG employees;
- (c) Associate Administrator for Disaster Assistance for Disaster Area Office Directors;
- (d) Associate Administrator for Field Operations for Regional Administrators;
- (e) Appropriate Associate Administrator or equivalent for Central Office Duty employees;
- (f) Regional Administrators for their subordinate employees;
- (g) District Directors for their respective district, branch, and post of duty employees;
- (h) Division Chief, DAS for DAS support personnel;
- (i) Disaster Area Office Directors for their respective Disaster Area employees; and
- (j) Area Directors for their respective Government Contracting employees.

15. What Must SBA Employees and Government Contractors do to Maintain and Protect Government Vehicles?

You must:

- a. Park or store motor vehicles in ways that reasonably protect them from pilferage or damage,
- b. Lock unattended motor vehicles. (The only exception is when fire regulations or other directives prohibit locking vehicles in closed buildings or enclosures); and
- c. Otherwise act in a reasonable manner when using a government vehicle.

16. What do I do if I Suspect Unauthorized Use of a Government Vehicle?

If you suspect unauthorized use of a Government vehicle, you must report it through your chain of command to the OIG Investigations Division. If the misconduct involves an official in your reporting chain, you must still report the misconduct but may do so through the OIG telephone hotline or directly to the Headquarters OIG.

The OIG is responsible for conducting, coordinating, or supervising investigations of allegations of unauthorized use of a Government vehicle as it deems necessary.

17. What Happens if an SBA Employee Misuses a Government Vehicle?

If you use or authorize the use of a Government vehicle for other than official purposes, you are subject to disciplinary action. The penalty for misuse of a Government vehicle ranges from a mandatory minimum 30 day suspension up to removal from the Federal service. (*See Appendix 5, SOP 37 52 2, "Adverse and Disciplinary Actions."*)

18. Am I Bound by State and Local Traffic Laws When Operating a Government Vehicle?

Yes, you are personally responsible if you violate State or local traffic laws. If you are fined or otherwise penalized for an offense you commit while performing official duties, payment is your personal responsibility.

19. Who Pays for Tolls and Parking Fees While Operating a Government Vehicle?

You must pay for tolls and parking fees while operating a motor vehicle owned or leased by the Government. However, you may be reimbursed for tolls and parking fees incurred while performing official duties.

20. Must the Government Vehicles be Properly Maintained?

Yes. DAS, OIG, and Field Office Head's must ensure preventive maintenance is performed for each vehicle in accordance with the Car Users Manual maintenance program.

For authorization of unscheduled repairs or service over \$100 or for any tire, glasses, and battery replacement, regardless of cost, please call GSA's MCC at (888) 622-6344.

For after-hours emergencies, call (800) 621-3588. Notification of emergency repairs should be made by DAS, OIG, and Field Office Head, respectively to MCC the next business day.

21. Are there Mileage Limitations on the Use of a Government Vehicle?

The GSA average use objective for interagency motor pool standard passenger-carrying vehicles is 3,000 miles per quarter, or 12,000 miles per year, with minimum of 8,000 miles per year. If the objective is not met, GSA will require a justification why the vehicle is needed.

22. Must SBA Vehicles Pass State Emission and Safety Inspections?

Yes. DAS, OIG, and Field Office Heads are responsible for ensuring that emissions and State inspections are timely done.

23. How do I Purchase Fuel for a Government Vehicle?

You must use the fleet credit card issued when the vehicle was leased and/or purchased to obtain fuel. The Division Chief, DAS and Field Office Heads, respectively maintain the credit card. The fuel recommended by the vehicle manufacturer should be used.

24. What Should I do if I Am Involved in an Accident While Operating a Government Vehicle?

It is recommended that you:

- a. Make no statement as to the responsibility for the accident except to your supervisor or to a Government investigating officer;
- b. Report the accident to State, county, or municipal authorities, as required by law;
- c. Complete Standard Form 91, "*Motor Vehicle Accident Report*," (See Appendix 11) at the scene of the accident, if possible;
- d. Obtain name, address, and telephone numbers of any witnesses;
- e. When possible, request each witness complete an SF 94, "*Statement of Witness*" (See Appendix 12); and
- f. Submit the SF 94 and all other pertinent information, i.e., police report, SBA Form 386 "Report of Property for Survey", etc, through your supervisor to the Property Control Officer for Board of Survey action. (Field employees). Headquarters employees must submit this information through their supervisor to the FMB for Board of Survey action. Once the Board of Survey has made a determination on the survey report, the Chairperson will forward a complete package of the accident report to the appropriate GSA office as outlined in the vehicle operator's package. (See Chapter 5, paragraph 2).

25. What is the Procedure When a Third Party Files an Accident Claim for Damage to Property or Injury Against the Government?

When a third party files an accident claim against the Government, contact the Office of General Counsel.

26. What Happens if an Employee Involved in an Accident While Operating a Government Vehicle is Unable to Complete the Appropriate Reports?

The employee's supervisor must complete the required forms and notify the State, county, or municipal authorities, as required by law. The Division Chief, DAS and Field Office Heads, respectively, must notify the GSA Interagency Fleet Management Center.

27. What Records must be Maintained on SBA Vehicles?

The Accountable Officer must maintain the following:

- a. Records of actual vehicle usage, maintenance and accidents on *SBA Form 1692, "Log of Government Vehicle Usage."* (See Appendix 13), which must be maintained for 3 years, and
- b. Record of home-to-work transportation use for field work on *SBA Form 1691, "Log of Government Vehicle Usage Between Home and Work for Field Work,"* (See Appendix 14).
- c. Record of preventive maintenance and accidents on SBA Form, 1685, "Preventive Maintenance and Accident Log," (See Appendix 15).

28. Is there a Motor Vehicle Reporting Requirement?

Yes, Administrative Officers must submit data to GSA through the Federal Automotive Statistical Tool (F.A.S.T.) found at www.fastweb.inel.gov/ for the following annual reports:

- a. OMB on current acquisition and cost data for all GSA leased, commercial leased and/or Government owned vehicles by August 15th; and
- b. GSA on fuel, mileage and projected acquisitions by December 1st.

Chapter 5

Lost, Stolen, Damaged, or Destroyed Property

1. What Happens if SBA Property is Lost or Stolen?

When SBA property has been reported lost or stolen, the Property Control Officer must take the following steps:

- a. Notify the DAS, who will notify the Federal Protective Service, the building manager, and the Office of Inspector General, Investigations Division. (Headquarters only)
- b. Notify the Field Office Head, who will notify the Federal Protective Service, and the building manager. (Field only)
- c. The Property Control Officer must ascertain the facts and submit a report to the Chairperson of the Board of Survey on SBA Form 386, "Report of Property for Survey" if the property is valued at \$250 or more. The following information must be provided:
 - (1) Identification and description of property;
 - (2) Date the property was discovered missing and by whom;
 - (3) Date the property was last seen and by whom;
 - (4) Last location;
 - (5) Efforts made by the Property Control Officer to locate the property such as inquiry of: building manager, SBA employees and employees occupying adjoining offices or the entire building; and search of premises;
 - (6) Persons having access to or responsibility for the property;
 - (7) Method of safeguarding;
 - (8) Date of the last inventory listing the property; and
 - (9) Any other information regarding circumstances of lost/stolen property.

If the property is valued at less than \$250, the field supervisor and Headquarters division

chiefs, respectively, must forward the Division Chief, DAS or the Field Office Head, respectively, a memorandum explaining what happened to the property. In addition, the Property Control Officer must ensure the Accountable Officer updates the property status in the Fixed Asset Accountability System.

2. What happens if SBA Property is Damaged or Destroyed?

When SBA property has been damaged or destroyed, the Property Control Officer must ascertain the facts and submit a report to the Chairperson of the Board of Survey on SBA Form 386, "Report of Property for Survey" if the property is valued at \$250 or more. The following information must be provided:

- a. Identification and description of property;
- b. Extent of damage;
- c. Cost of repairs or replacement; and
- d. How the damage or destruction occurred.

If the property is valued at less than \$250, the Field Office Head and Headquarters division chiefs, respectively, must forward the Division Chief, DAS and the Field Office Head, respectively, a memorandum explaining what happened to the property. In addition, the Property Control Officer must ensure that the Accountable Officer updates the property status in the Fixed Asset Accountability System.

3. Who are the Members of the Board of Survey?

- a. **Headquarters Board of Survey** is a four-member board composed of the Chief, FMB, serving as chairperson, and designees from the Office of Equal Employment Opportunity & Civil Rights Compliance (EEOC), and the Office of Chief Financial Officer (OCFO). A designee from the Office of General Counsel (OGC) serves as a non-voting member.
- b. **District Office Board of Survey** is a four-member board composed of the District Director, serving as chairperson, and designees with financial and procurement responsibilities. The District Counsel serves as a non-voting member.
- c. **Disaster Area Office Board of Survey** is a four-member board composed of Area Director, serving as chairperson, and designees with financial and procurement responsibilities. The Area Counsel serves as a non-voting member.

4. What is the Board of Survey's Role?

The Board is responsible for:

- a. Reviewing all cases of loss, theft, damage, or destruction of personal property valued at or above \$250 or more;
- b. Considering the evidence submitted with the survey report;
- c. Gathering additional information from the responsible individual or witnesses via in-person interviews so long as no travel expense is incurred, conference call, or additional written documentation, when necessary;
- d. Making recommendations to SBA officials regarding corrective action to avoid future loss; and
- e. Making recommendations regarding liability, disposition of personal property, and forwarding to the Board of Survey Officer for approval or disapproval.

NOTE: An employee may make restitution (fair market value) for the loss, theft, damage or destruction of SBA personal property if they wish.

5. What is the Dollar Limitation of Boards of Survey?

Field Office Boards of Survey can review and decide on damages to SBA's property of \$10,000 and under. The chairperson can review and decide on damages of \$10,000 or under (independent of the Board's review) except when he/she believes the report should be reviewed by the full Board, or when an employee requests a hearing before the full Board. Damages over \$10,000 must be forwarded to the Headquarters Board of Survey.

6. Who are the Survey Officers and What is their Role?

The Division Chief of DAS serves as the Survey Officer for Headquarters. The Associate Administrator for Disaster Assistance and the Associate Administrator for Field Operations serve as Survey Officers for their respective program. The Survey Officer is responsible for:

- a. Reviewing, approving, disapproving, or modifying the recommendations of the Chairperson, when acting alone, and the Board of Survey, when acting as a group;
- b. Determining disposition on lost, destroyed, damaged, or stolen property, i.e., determine if this property should be removed from the records; or
- c. Determining if a case should be reopened if additional facts become available.

7. Who is Responsible for Completing the Report of Property for Survey?

- a. The Property Control Officer is responsible for completing items 1 through 5. He/She must use the condition codes listed below to complete item 5a:

| Disposal condition code | Definition |
|-------------------------|---|
| 1 | New. Property which is in new condition or unused condition and can be used immediately without modifications or repairs. |
| 4 | Usable. Property which shows some wear, but can be used without significant repair. |
| 7 | Repairable. Property which is unusable in its current condition but can be economically repaired. |
| X | Salvage. Property which has value in excess of its basic material content, but repair or rehabilitation is impractical and/or uneconomical. |
| S | Scrap. Property which has no value except for its basic material content. |

- b. The Accountable Officer or the individual the property is assigned is responsible for completing item 1 thru 5 and forward to the Property Control Officer for signature.
- c. The Chairperson of the Board of Survey must complete item 7 when acting independent of the full Board.
- d. The Board of Survey must complete item 8, listing its recommendations.
- e. The Survey Officer must complete item 9, and forward the original to OCFO for certification.
- f. The Chief Financial Officer must complete item 10 which certifies that action has been taken to collect funds owed SBA and the records have been adjusted, where appropriate and return to the Chairperson of the Board of Survey.
- g. The Chairperson of the Board of Survey must forward the responsible individual and/or office head a letter regarding the final disposition of the Report of Property for Survey along with a copy of the report. In addition, he/she must forward a copy to the Property Control Officer.
- h. The Property Control Officer must complete item 11 upon receipt of the fully executed copy of the Report of Property for Survey and maintain it in the appropriate file.

Chapter 6

Photocopy Management

1. What are the Rules Governing the Use of Photocopy Machines?

SBA Employees are allowed limited personal use of the photocopy machines, provided that such use is of short duration, does not adversely affect or hinder the mission of the Agency and no fee is charged to the Agency.

2. When is Centralization of Photocopy Equipment Necessary?

In order to keep costs to a minimum, a centralized photocopy center will be established whenever possible. No photocopy equipment should be purchased or rented for the sole use of one office, unless that office has no access to a centralized copier or a proven need has been established.

3. Who is Responsible for Maintaining Photocopy Equipment?

DAS is responsible for photocopy management agency-wide. The DAS photocopy coordinator must:

- (1) Maintain a file on each photocopier including:
 - (a) Equipment type, make, model, and serial number;
 - (b) Date of initial installation;
 - (c) Method of procurement;
 - (d) Current location of equipment;
 - (e) Record monthly readings for each photocopier; and
 - (f) Production speed and other significant equipment characteristics.
- (2) Recommend approval or disapproval of all requests for new copiers.
- (3) Provide operator training in Headquarters. Administrative Officers will ensure training is conducted for Field employees.
- (4) Order supplies.

Appendix 1

Index to Forms and Reports

| <u>Form</u> | <u>Chapter</u> |
|---|----------------|
| SBA Form 110, “Annual Report of Inventory” | 2-4c |
| SF 120, “Report of Excess Personal Property” | 2-4e |
| SBA Form 78, “SBA Separation Checklist” | 2-4f |
| SBA Form 386, “Report of Property for Survey” | 2-4g |
| SBA Form 654, “Property Receipt” | 2-5f |
| SBA 2258, “Property Pass” | 2-7b |
| SF 122, “Transfer Order Excess Personal Property” | 3-2(b) |
| (Sample Memo), “Request to Abandon/Destroy Excess Property” | 3-6 |
| SBA Form 1689, “Request Authorization to Use a Government Vehicle From Home-To-Work for Field Work” | 4-13 |
| SF 91, “Motor Vehicle Accident Report” | 4-24(c) |
| SF 94, “Statement of Witness” | 4-24(e) |
| SBA Form 1692, “Log of Government Vehicle Usage” | 4-27(a) |
| SBA Form 1691, “Log of Government Vehicle Usage Between Home and Work for Field Work” | 4-27(b) |
| SBA Form 1685, “Preventive Maintenance and Accident Log” | 4-27(c) |
| <u>Reports</u> | |
| Annual Inventory Report | 2-4c |
| Federal Automotive Statistical Tool (FAST) Report | 4-28 |

Appendix 2
(Chapter 2, Paragraph 4 (c))
Sample

ANNUAL REPORT OF INVENTORY

DATE:

OFFICE NAME:

OFFICE LOCATION:

CUSTODIAN:

PHONE:

Attached is a copy of the FAAS inventory, which is based on the accountable property in this office.

NO. OF COMPUTERS DONATED TO SCHOOLS: _____

NO. OF COMPUTERS DONATED TO NON-PROFIT ORGS: _____

NO. OF COMPUTER ITEMS EXCESSED: _____

NO. OF FURNITURE ITEMS EXCESSED: _____

NO. OF COMPUTER ITEMS ABANDONED/DESTROYED: _____

NO. OF FURNITURE ITEMS ABANDONED/DESTROYED: _____

NO. OF COMPUTERS ITEMS PURCHASED: _____

NO. OF IT EQUIPMENT PURCHASED: _____
 (i.e., fax machines, printers, copiers, etc.)

NO. OF FURNITURE ITEMS PURCHASED: _____

TOTAL VALUE OF NEW PURCHASES IN **FY 20**____: _____

I certify that a physical inventory was conducted on _____ and that our inventory corresponds with the FAAS system.

 Office Director's Signature

SBA Form 110 (03-04) REF SOP 00 13
All Other Editions Obsolete

Appendix 3
(Chapter 2, Paragraph 4(e))

Sample

PAGE 1 OF _____

| | | | | | | |
|---|---|---|---------------|--|------------------------|---|
| STANDARD FORM 120 REV. APRIL 1957 GEN. SERV. ADMIN. FPMR (41 CFR) 101-43.311 | | REPORT OF EXCESS PERSONAL PROPERTY | | 1. REPORT NO. | 2. DATE MAILED | 3. TOTAL COST \$ |
| 4. TYPE OF REPORT (Check one only of "a," "b," "c," or "d") | | <input type="checkbox"/> a. ORIGINAL <input type="checkbox"/> c. PARTIAL W/D <input type="checkbox"/> b. CORRECTED <input type="checkbox"/> d. TOTAL W/D | | (Also check "e" and/or "f" if appropriate) | | <input type="checkbox"/> e. OVERSEAS <input type="checkbox"/> f. CONTRACTORS INV |
| 5. TO (Name and Address of Agency to which report is made) THRU | | | | 6. APPROP. OR FUND TO BE REIMBURSED (if any) | | |
| 7. FROM (Name and Address of Reporting Agency) | | | | 8. REPORT APPROVED BY (Name and Title) | | |
| 9. FOR FURTHER INFORMATION CONTACT (Title, Address and Telephone No.) | | | | 10. AGENCY APPROVAL (if applicable) | | |
| 11. SEND PURCHASE ORDERS OR DISPOSAL INSTRUCTIONS TO (Title, Address and Telephone No.) | | | | 12. GSA CONTROL NO. | | |
| 13. FSC GROUP NO. | 14. LOCATION OF PROPERTY (if location is to be abandoned give date) | | 15. REIM/REQD | | 16. AGENCY CONTROL NO. | 17. SURPLUS RELEASE DATE |
| | | | YES | NO | | |

| 18. EXCESS PROPERTY LIST | | | | | | | |
|--------------------------|--------------------|--------------|-------------|------------------------|------------------|--------------|---------------------|
| ITEM NO. (a) | DESCRIPTION (b) | COND. (c) | UNIT (d) | NUMBER OF UNITS (e) | ACQUISITION COST | | FAIR VALUE % (h) |
| | | | | | PER UNIT (f) | TOTAL (g) | |
| | | | | | | | |

STANDARD FORM 120 REV. (Use Standard Form 120A for Continuation Sheets) PREVIOUS EDITION USABLE
 APRIL 1957 EDITION
 This form was electronically produced by Elite Federal Forms, Inc.

Appendix 4 (Chapter 2, Paragraph 4(f)) Sample



U.S. SMALL BUSINESS ADMINISTRATION SEPARATION CHECKLIST

SECTION I. TO BE COMPLETED BY SUPERVISOR OR ADMINISTRATIVE OFFICER

INSTRUCTIONS: Initiate this form at least one week prior to employee's separation date. Complete Section I and check appropriate clearances for this employee in Section III and IV.

| | | |
|--|------------------------|------------------------------|
| Name | Social Security Number | Effective Date of Separation |
| Full Name of Organization (Include all organizational levels.) | | |
| Check one: <input type="checkbox"/> Leaving Federal Service <input type="checkbox"/> Transferring to Another Federal Agency | | |
| Please check each of the following as you complete them. Attach copies as required. | | |
| <input type="checkbox"/> Lump Sum Leave Payment (AD-581) Attached <input type="checkbox"/> Leave Audit (AD-717) Attached <input type="checkbox"/> Request for Personnel Action (SF-52) Attached <input type="checkbox"/> LAN/E-Mail/Mainframe Access Terminated <input type="checkbox"/> Final Performance Appraisal Completed | | |
| I certify that all required forms have been completed and are attached, and that the separated employee's work area has been inventoried. | | Telephone Number |
| Supervisor/Admin. Officer's Signature and Date | | |

SECTION II. ADMINISTRATIVE CLEARANCES (REQUIRED FOR ALL EMPLOYEES)

INSTRUCTIONS FOR EMPLOYEES: To avoid delay in receipt of your final pay, complete and submit this form to your servicing Personnel Office. You must clear every item in Section II and all "checked" items in Section III and IV. Office of Financial Operations' (OFO) clearance may be obtained by FAX on 303-844-4738. "Post-Employment Briefing" (GC) clearance may be obtained from your Standards of Conduct Counselor. You must clear with your personnel specialist last. If you want your final pay check sent to an address other than where your pay checks are currently sent, complete and attach Change of Address form (AD-349), available in your servicing personnel office, to this clearance form.

INSTRUCTIONS FOR CLEARANCE OFFICIALS: Indicate clearance of chargeable items by signing the applicable block. Note cleared (C) or not cleared (NC) in the appropriate column. Indicate in the comments column the reason any chargeable item was not accounted for or returned and indicate the dollar value of unaccounted for items to be collected from the employee. Sign your full signature.

| | Item | C/NC | Comments | Signature & Date | Phone # |
|----|---------------------------|------|----------|------------------|---------|
| O | Travel Advances | | | | |
| F | Other Travel Indebtedness | | | | |
| O | Imprest Funds | | | | |
| | Travel Credit Card | | | | |
| GC | Post-Employment Briefing | | | | |
| | Identification/Fascard | | | | |
| A | Records Management | | | | |
| D | Reference Library Loans | | | | |
| M | Parking Permit/Fascard | | | | |
| I | Property/Equipment | | | | |
| N | Office/Furniture-Keys | | | | |
| | Visa Purchasing | | | | |

SEA Form 78 (3/00) Previous editions are obsolete.



SECTION III. CLEARANCE BY THE OFFICE OF INSPECTOR GENERAL (OIG) (REQUIRED IF CHECKED)

If employee had access to classified information, the OIG must debrief the employee before certifying clearance.

| Item | Signature | Telephone Number | Date |
|---|-----------|------------------|------|
| <input type="checkbox"/> Classified Information | | | |

SECTION IV. OTHER CLEARANCES (REQUIRED IF CHECKED)

| Item | Signature | Telephone Number | Date |
|---|-----------|------------------|------|
| <input type="checkbox"/> Telephone Credit Card | | | |
| <input type="checkbox"/> Cellular Phone | | | |
| <input type="checkbox"/> Pager | | | |
| <input type="checkbox"/> Other (Please Specify) | | | |
| <input type="checkbox"/> Other (Please Specify) | | | |
| <input type="checkbox"/> Other (Please Specify) | | | |

SECTION V. EMPLOYEE CERTIFICATION

I certify that, except as indicated above, I have returned all government property, records, or documents, including classified material issued or furnished by the Small Business Administration. I am not otherwise indebted to the Small Business Administration. I have have not attached an AD-349, Change of Address form.

| | |
|----------------------|------|
| Employee's Signature | Date |
|----------------------|------|

SECTION VI. SERVICING PERSONNEL OFFICE CLEARANCE

INSTRUCTIONS FOR SERVICING PERSONNEL SPECIALIST: Indicate completion by initials.

| | |
|--|--|
| Forms Provided to Employee: | |
| <input type="checkbox"/> SF-8, Unemployment Compensation | <input type="checkbox"/> SF-2809, Health Benefits Registration |
| <input type="checkbox"/> SF-2802 (CSRS)/3106 (FERS), Retirement Refund | <input type="checkbox"/> SF-2810, Health Benefits Change in Enrollment |
| <input type="checkbox"/> SF-2819, FEGLI Notice of Conversion | <input type="checkbox"/> TSP Separation Package |
| <input type="checkbox"/> SF-2821, Agency Certification of Insurance Status | |
| <input type="checkbox"/> AD-581, Lump Sum Leave Payment, Released to NFC | Date |
| <input type="checkbox"/> NFC Notified by _____ to put hold on final payment. | Date |
| <input type="checkbox"/> AD-343 Issued by _____ . Amount Due \$ _____ . | Date |
| Signature - Servicing Personnel Specialist | Date |

Appendix 5
(Chapter 2, Paragraph 4 (g))
Sample

| U.S. Small Business Administration Report of Property for Survey | | | | | | 1. Survey No: |
|--|-----------------|----------------------------|----------------------------|-----------------------|-------------------|---------------|
| 2. Office: | | | 3. Location: | | | 4. Date: |
| 5. Check the appropriate box(s) that best describe the items listed below: <input type="checkbox"/> Lost <input type="checkbox"/> Stolen <input type="checkbox"/> Damaged <input type="checkbox"/> Destroyed | | | | | | |
| Item No. (a) | Quantity (b) | Bar Code/Serial No. (c) | Description of Item (d) | Condition Code (e) | Unit Price (f) | Value (g) |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| To be completed by authorized user | | | | | | |
| 6. Describe what happened. | | | | | | |
| I certify that the above is a true and complete statement of the facts relating to this matter. | | | | Title: | | Date: |
| | | | | | | |
| To be completed by Chairperson, Board of Survey, when acting independent of the Board on claims valued at less than \$5,000 | | | | | | |
| 7. To: Survey Officer | | | | | | |
| <input type="checkbox"/> I have determined that this report is true and complete and that no individual should be held liable. (Explain below) | | | | | | |
| <input type="checkbox"/> I find _____ was negligent and should be held liable for the replacement cost, \$ _____. | | | | | | |
| <input type="checkbox"/> Other (Explain below) | | | | | | |
| _____ Signature | | | _____ Title | | _____ Date | |

SBA Form 386 (5-05) REF: SOP 00 13

**Appendix 6
(Chapter 2, Paragraph 5 (f))
Sample**



**U.S. SMALL BUSINESS ADMINISTRATION
ACCOUNTABLE PROPERTY RECEIPT**

EMPLOYEE NAME (PRINT): _____ DATE: _____

| Issue Date | Description of Property | Barcode/ Serial # | Return Date | Condition of Property | Transferred To |
|------------|-------------------------|-------------------|-------------|-----------------------|----------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Print Name of Property Control Officer Property Control Officer Signature Date

I hereby acknowledge receipt of the property described above. I understand that I am responsible for the proper use and care of the property while in my custody. Should I fail to properly account for SBA property, I may be liable for the repair and/ or replacement costs, damage or loss, and/or subject to disciplinary action (see SOP 37 52 2, "Adverse and Disciplinary Actions," Appendix 5).

Employee Signature Date

ISSUING OFFICE

SBA Form 654 (08-2007) All Other Editions Obsolete

Appendix 7
(Chapter 2, Paragraph 7 (b))
Sample

| | | |
|---|------------------------------|---|
| SBA Form 2258 April 2007 | SBA PROPERTY PASS | 1. DATE ISSUED |
| 2. NAME | | 3. OFFICE |
| 4. DESCRIPTION OF PROPERTY | | |
| 5. PROPERTY OF: <input type="checkbox"/> SBA <input type="checkbox"/> PERSONAL | | 6. PURPOSE: <input type="checkbox"/> REPAIR <input type="checkbox"/> LOAN <input type="checkbox"/> OTHER |
| 7. SIGNATURE of AUTHORIZING OFFICIAL | | 8. TITLE |
| | | 9. RETURN BY |
| This pass is to be used whenever property is removed from the building. It is to be properly filled in, signed and handed to the guard when leaving the building. | | |

Appendix 8

| Page _____ of _____ | | TRANSFER ORDER EXCESS PERSONAL PROPERTY (CONTINUATION SHEET) | | | 1. ORDER NO. | | | |
|--|--------------------|--|-------------|-----------------|------------------|--------------|---|--|
| | | | | | 2. DATE | | | |
| PROPERTY ORDERED | | | | | | | | |
| GSA OR HOLDING AGENCY NO. (a) | ITEM NO. (b) | DESCRIPTION <i>(Include noun name, FSC Group and Class, Condition Code and, if available, Federal Stock Number)</i> (c) | UNIT (d) | QUANTITY (e) | ACQUISITION COST | | TOTAL FAIR VALUE <i>(if any)</i> (h) | |
| | | | | | UNIT (f) | TOTAL (g) | | |
| | | | | | | | | |

**Appendix 9
(Chapter 3, Paragraph 6)
Sample**



**U.S. SMALL BUSINESS ADMINISTRATION
WASHINGTON, D.C. 20416**

DATE:
TO: Chief, Facilities Management Branch
THRU:
FROM:
SUBJECT: Request to Abandon/Destroy Excess Property

In accordance with SOP 00 13 4, "Property Management Program," I have determined that the following has no commercial value and the estimated cost of its continued care and handling would exceed the estimated proceeds from its sale. Therefore, I propose to dispose of this property by: EXPLAIN THE METHOD OF DISPOSAL AND LOCATION.


1. Item:
Serial No:
Bar Code No:
Condition:
Estimated Value:
2. Item:
Serial No:
Bar Code No:
Condition:
Estimated Value:
3. Item:
Serial No:
Bar Code No:
Condition:
Estimated Value:

Approve: [] Disapproved: []

Chief, Facilities Management Branch

Date

**Appendix 10
(Chapter 4, Paragraph 13)
Sample**

| | |
|--|---|
|  <p>U.S. SMALL BUSINESS ADMINISTRATION REQUEST FOR AUTHORIZATION TO USE A GOVERNMENT VEHICLE FOR HOME-TO-WORK FOR FIELD WORK</p> | |
| 1. NAME AND TITLE OF EMPLOYEE | 2. NUMBER OF EMPLOYEES IF REQUEST IS BY POSITION (SEE BLOCK 10) |
| 3. OFFICE NAME AND LOCATION | 4. DATE OF REQUEST |
| 5. VEHICLE IDENTIFICATION | 6. TOTAL DISTANCE TO BE TRAVELED |
| 7. DATES OF PLANNED USAGE | 8. DURATION OF AUTHORIZATION |
| 9. DESCRIBE CIRCUMSTANCES REQUIRING HOME-TO-WORK TRANSPORTATION. INCLUDE ALTERNATIVES CONSIDERED, COST, AND REASONS WHY THEY ARE NOT SATISFACTORY. | |
| (Continue on reverse side or use additional sheet) | |
| 10. IF AUTHORIZATION IS REQUESTED BY POSITION, LIST ALL INDIVIDUALS BY NAME AND TITLE WHO WILL BE USING THE VEHICLES DURING THE PERIOD OF THIS AUTHORIZATION AND PROVIDE UPDATES TO THIS LIST IF CHANGES IN PERSONNEL OCCUR. | |
| NAME, TITLE _____ | NAME, TITLE _____ |
| NAME, TITLE _____ | NAME, TITLE _____ |
| (Continue on reverse side or use additional sheet) | |
| 11. NAME, TITLE AND SIGNATURE OF REQUESTING OFFICIAL | DATE |
| The person or group of persons identified in items 1 and 2 above are authorized to use the Government vehicle(s) listed in item 5 for home-to-work transportation in accordance with the provisions of 41 CFR 104.6.4. | |
| 12. SIGNATURE OF APPROVING OFFICIAL | DATE |

SBA Form 1689 (4-07) REF: SOP 00 13



Appendix 11 (Chapter 4, Paragraph 24 (c)) Sample

| | | | | | |
|---|---|--|---|---|------------------------|
| MOTOR VEHICLE ACCIDENT REPORT | Please read the Privacy Act Statement on Page 3. | INSTRUCTIONS: Sections I thru IX are filled out by the vehicle operator. Section X, items 72 thru 82c are filled out by the operator's supervisor. Sections XI thru XII are filled out by an accident investigator for bodily injury, fatality, and/or damage exceeding \$500. | | | |
| SECTION I - FEDERAL VEHICLE DATA | | | | | |
| 1. DRIVER'S NAME (Last, first, middle) | | 2. DRIVER'S LICENSE NO./STATE/LIMITATIONS | | 3. DATE OF ACCIDENT | |
| 4a. DEPARTMENT/FEDERAL AGENCY PERMANENT OFFICE ADDRESS | | | | 4b. WORK TELEPHONE NUMBER | |
| 5. TAG OR IDENTIFICATION NUMBER | 6. EST. REPAIR COST \$ | 7. YEAR OF VEHICLE | 8. MAKE | 9. MODEL | |
| 11. DESCRIBE VEHICLE DAMAGE | | | | 10. SEAT BELTS USED <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| SECTION II - OTHER VEHICLE DATA (Use Section VII if additional space is needed.) | | | | | |
| 12. DRIVER'S NAME (Last, first, middle) | | | 13. DRIVER'S LICENSE NUMBER/STATE/LIMITATIONS | | |
| 14a. DRIVER'S WORK ADDRESS | | | 14b. WORK TELEPHONE NUMBER | | |
| 15a. DRIVER'S HOME ADDRESS | | | 16b. HOME TELEPHONE NUMBER | | |
| 16. DESCRIBE VEHICLE DAMAGE | | | 17. ESTIMATED REPAIR COST \$ | | |
| 18. YEAR OF VEHICLE | 19. MAKE OF VEHICLE | 20. MODEL OF VEHICLE | | 21. TAG NUMBER AND STATE | |
| 22a. DRIVER'S INSURANCE COMPANY NAME AND ADDRESS | | | 22b. POLICY NUMBER | | |
| | | | 22c. TELEPHONE NUMBER | | |
| 23. VEHICLE IS <input type="checkbox"/> CO-OWNED <input type="checkbox"/> RENTAL <input type="checkbox"/> LEASED <input type="checkbox"/> PRIVATELY OWNED | | 24a. OWNER'S NAME(S) (Last, first, middle) | | 24b. TELEPHONE NUMBER | |
| 25. OWNER'S ADDRESS(ES) | | | | | |
| SECTION III - KILLED OR INJURED (Use Section VIII if additional space is needed.) | | | | | |
| 26. NAME (Last, first, middle) | | | 27. SEX | 28. DATE OF BIRTH | |
| 29. ADDRESS | | | | | |
| A | 30. MARK "X" IN TWO APPROPRIATE BOXES <input type="checkbox"/> KILLED <input type="checkbox"/> DRIVER <input type="checkbox"/> PASSENGER <input type="checkbox"/> INJURED <input type="checkbox"/> HELPER <input type="checkbox"/> PEDESTRIAN | | 31. IN WHICH VEHICLE <input type="checkbox"/> FED <input type="checkbox"/> OTHER (2) | 32. LOCATION IN VEHICLE | 33. FIRST AID GIVEN BY |
| | 34. TRANSPORTED BY | | 35. TRANSPORTED TO | | |
| 36. NAME (Last, first, middle) | | | 37. SEX | 38. DATE OF BIRTH | |
| 39. ADDRESS | | | | | |
| B | 40. MARK "X" IN TWO APPROPRIATE BOXES <input type="checkbox"/> KILLED <input type="checkbox"/> DRIVER <input type="checkbox"/> PASSENGER <input type="checkbox"/> INJURED <input type="checkbox"/> HELPER <input type="checkbox"/> PEDESTRIAN | | 41. IN WHICH VEHICLE <input type="checkbox"/> FED <input type="checkbox"/> OTHER (2) | 42. LOCATION IN VEHICLE | 43. FIRST AID GIVEN BY |
| | 44. TRANSPORTED BY | | 45. TRANSPORTED TO | | |
| a. NAME OF STREET OR HIGHWAY | | | b. DIRECTION OF PEDESTRIAN (SW corner to NE corner, etc.) FROM _____ TO _____ | | |
| 46. Pedestrian | c. DESCRIBE WHAT PEDESTRIAN WAS DOING AT TIME OF ACCIDENT (Crossing intersection with signal, against signal, diagonally; in roadway playing, walking, hitchhiking, etc.) | | | | |

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Prescribed by GSA - FPMR 101-38.6

SECTION IV - ACCIDENT TIME AND LOCATION (Use Section VIII if additional space is needed.)

| | | |
|----------------------------------|---|--|
| 47. DATE OF ACCIDENT | 48. PLACE OF ACCIDENT (Street address, city, state, ZIP Code; Nearest landmark; Distance nearest intersection; Kind of locality (industrial, business, residential, open country, etc.); Road description). | |
| 49. TIME OF ACCIDENT AM PM | | |

50. INDICATE ON THIS DIAGRAM HOW THE ACCIDENT HAPPENED
Use one of these outlines to sketch the scene. Write in street or highway names or numbers.

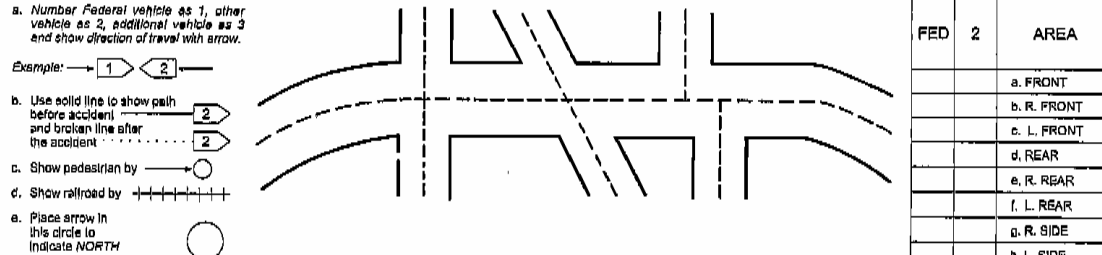
a. Number Federal vehicle as 1, other vehicle as 2, additional vehicle as 3 and show direction of travel with arrow.
Example: → 1 ◊ 2

b. Use solid line to show path before accident and broken line after the accident

c. Show pedestrian by ○

d. Show railroad by + + + + +

e. Place arrow in this circle to indicate NORTH



| | | | |
|--|-----|---|-------------|
| | FED | 2 | AREA |
| | | | a. FRONT |
| | | | b. R. FRONT |
| | | | c. L. FRONT |
| | | | d. REAR |
| | | | e. R. REAR |
| | | | f. L. REAR |
| | | | g. R. SIDE |
| | | | h. L. SIDE |

52. DESCRIBE WHAT HAPPENED (Refer to vehicles as "Fed", "2", "3", etc. Please include information on posted speed limit, approximate speed of the vehicles, road conditions, weather conditions, driver visibility, condition of accident vehicles, traffic controls (warning light, stop signal, etc.) condition of light (daylight, dusk, night, dawn, artificial light, etc.) and driver actions (making U-turn, passing, stopped in traffic, etc.).

SECTION V - WITNESS/PASSENGER (Witness must fill out SF 94, Statement of Witness) (Continue in Section VIII.)

| | | | |
|---|--------------------------------|---------------------------|---------------------------|
| A | 53. NAME (Last, first, middle) | 54. WORK TELEPHONE NUMBER | 55. HOME TELEPHONE NUMBER |
| | 56. BUSINESS ADDRESS | 57. HOME ADDRESS | |
| B | 58. NAME (Last, first, middle) | 59. WORK TELEPHONE NUMBER | 60. HOME TELEPHONE NUMBER |
| | 61. BUSINESS ADDRESS | 62. HOME ADDRESS | |

SECTION VI - PROPERTY DAMAGE (Use Section VIII if additional space is needed.)

| | | |
|--------------------------------|------------------------------|----------------------------|
| 63a. NAME OF OWNER | 63b. OFFICE TELEPHONE NUMBER | 63c. HOME TELEPHONE NUMBER |
| 63d. BUSINESS ADDRESS | 63e. HOME ADDRESS | |
| 64a. NAME OF INSURANCE COMPANY | 64b. TELEPHONE NUMBER | 64c. POLICY NUMBER |
| 65. ITEM DAMAGED | 66. LOCATION OF DAMAGED ITEM | 67. ESTIMATED COST \$ |

SECTION VII - POLICE INFORMATION

| | | |
|------------------------------|-----------------------------------|-----------------------|
| 68a. NAME OF POLICE OFFICER | 68b. BADGE NUMBER | 68c. TELEPHONE NUMBER |
| 69. PRECINCT OR HEADQUARTERS | 70a. PERSON CHARGED WITH ACCIDENT | 70b. VIOLATION(S) |

| SECTION IX - FEDERAL DRIVER CERTIFICATION | | | | | |
|--|--|--|--|-----------------------|-----------------------------------|
| <p>In compliance with the Privacy Act of 1974, solicitation of the information requested on this form is authorized by Title 40 U.S.C. Section 491. Disclosure of the information by a Federal employee is mandatory as the first step in the Government's investigation of a motor vehicle accident. The principal purposes for using this information is to provide necessary data for legal counsel in legal actions resulting from the accident and to provide accident information/statistics in analyzing accident causes and developing methods of reducing accidents. Routine use of information may be by Federal, State or local governments, or agencies, when relevant to civil, criminal, or regulatory investigations or prosecutions. An employee of a Federal agency who fails to report accurately a motor vehicle accident involving a Federal vehicle or who refuses to cooperate in the investigation of an accident may be subject to administrative sanctions.</p> | | | | | |
| I certify that the information on this form (Sections I thru VIII) is correct to the best of my knowledge and belief. | | | | | |
| 71a. NAME AND TITLE OF DRIVER | | | 71b. DRIVER'S SIGNATURE AND DATE | | |
| SECTION X - DETAILS OF TRIP DURING WHICH ACCIDENT OCCURRED | | | | | |
| 72. ORIGIN | | | 73. DESTINATION | | |
| 74. EXACT PURPOSE OF TRIP | | | | | |
| 75. TRIP BEGAN | | DATE | TIME (Circle one) a.m. p.m. | 76. ACCIDENT OCCURRED | |
| | | | | DATE | TIME (Circle one) a.m. p.m. |
| 77. AUTHORITY FOR THE TRIP WAS GIVEN TO THE OPERATOR | | | 78. WAS THERE ANY DEVIATION FROM DIRECT ROUTE | | |
| <input type="checkbox"/> ORALLY <input type="checkbox"/> IN WRITING (Explain) | | | <input type="checkbox"/> NO <input type="checkbox"/> YES (Explain) | | |
| 79. WAS THE TRIP MADE WITHIN ESTABLISHED WORKING HOURS | | | 80. DID THE OPERATOR, WHILE ENROUTE, ENGAGE IN ANY ACTIVITY OTHER THAN THAT FOR WHICH THE TRIP WAS AUTHORIZED. | | |
| <input type="checkbox"/> YES <input type="checkbox"/> NO (Explain) | | | <input type="checkbox"/> NO <input type="checkbox"/> YES (Explain) | | |
| 81. COMPLETED BY DRIVER'S SUPERVISOR | | a. DID THIS ACCIDENT OCCUR WITHIN THE EMPLOYEE'S SCOPE OF DUTY | | | |
| <input type="checkbox"/> YES <input type="checkbox"/> NO | | b. COMMENTS | | | |
| 82a. NAME AND TITLE OF SUPERVISOR | | 82b. SUPERVISOR'S SIGNATURE AND DATE | | 82c. TELEPHONE NUMBER | |

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SECTION XI - ACCIDENT INVESTIGATION DATA

83. DID THE INVESTIGATION DISCLOSE CONFLICTING INFORMATION. YES NO (If "Yes", explain below.)

84. PERSONS INTERVIEWED

| NAME | | DATE | NAME | | DATE |
|------|--|------|------|--|------|
| a. | | | c. | | |
| b. | | | d. | | |

85. ADDITIONAL COMMENTS (Indicate section and item number for each comment.)

SECTION XII - ATTACHMENTS

LIST ALL ATTACHMENTS TO THIS REPORT

SECTION XIII - COMMENTS/APPROVAL

86. REVIEWING OFFICIAL'S COMMENTS

| 87. ACCIDENT INVESTIGATOR | | 88. ACCIDENT REVIEWING OFFICIAL | |
|-------------------------------|--|---------------------------------|--|
| a. SIGNATURE AND DATE | | a. SIGNATURE AND DATE | |
| b. NAME (First, middle, last) | | b. NAME (First, middle, last) | |
| c. TITLE | | c. TITLE | |
| d. OFFICE | | d. OFFICE | |
| e. OFFICE TELEPHONE NUMBER | | e. OFFICE TELEPHONE NUMBER | |

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Appendix 12 (Chapter 4, Paragraph 24 (e)) Sample

| | | | | |
|--|---|---|-----------------------|---|
| STATEMENT OF WITNESS <i>(Attach additional sheets if necessary)</i> | 1. DID YOU SEE THE ACCIDENT? | 2. WHEN DID THE ACCIDENT HAPPEN? a. TIME _____ b. DATE _____ | | FORM APPROVED O.M.B. NUMBER 3090-0118 |
| 3. WHERE DID THE ACCIDENT HAPPEN? <i>(Give street location and city)</i> | | | | |
| 4. TELL IN YOUR OWN WAY HOW THE ACCIDENT HAPPENED | | | | |
| 5. WHERE WERE YOU WHEN THE ACCIDENT OCCURRED? | | | | |
| 6. WAS ANYONE INJURED, AND IF SO, EXTENT OF INJURY IF KNOWN? | | | | |
| 7. DESCRIBE THE APPARENT DAMAGE TO PRIVATE PROPERTY | | | | |
| 8. DESCRIBE THE APPARENT DAMAGE TO GOVERNMENT PROPERTY | | | | |
| 9. IF TRAFFIC CASE, GIVE APPROXIMATE SPEED OF: | | | | a. GOVERNMENT VEHICLE <i>Miles per Hr.</i> |
| 10. GIVE THE NAMES AND ADDRESSES OF ANY OTHER WITNESSES TO THE ACCIDENT <i>(if known)</i> | | | | b. OTHER VEHICLE <i>Miles per hr.</i> |
| a. NAMES | | b. ADDRESSES <i>(Include ZIP Code)</i> | | |
| WITNESS COM- PLETING THIS FORM | 11. HOME ADDRESS <i>(Include ZIP Code)</i> | 12. WITNESS <i>(Print Name)</i> | a. HOME TELEPHONE NO. | |
| | 13. BUSINESS ADDRESS <i>(Include ZIP Code)</i> | Sign here | b. TODAY'S DATE | |
| | TELEPHONE NO. | | | |
| 14. INDICATE ON THE DIAGRAM BELOW WHAT HAPPENED: | | | | |
| 1. Number Federal vehicle as 1—other vehicle as 2—additional vehicle as 3, and show direction of travel by arrow <i>(Example: → 1 ← 2 ←)</i> | | | | |
| 2. Use solid line to show path before accident Broken line after accident | | | | |
| 3. Show pedestrian by | | | | |
| 4. Show railroad by | | | | |
| 5. Give names or numbers of streets or highways | | | | |
| 6. Indicate north by arrow in this circle | | | | |

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94-105

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STANDARD FORM 94 (REV. 2-83)
Prescribed by GSA, FPMR 101-39.8

FILE REFERENCE:

This office has been notified that you witnessed an accident which occurred

It will be helpful if you will answer, as fully as possible, the questions of the other side of this letter. Please read the Privacy Act Statement below.

Your courtesy in complying with this request will be appreciated. An addressed envelope, which requires no postage, is enclosed for your convenience in replying.

Sincerely

Enclosure

Use by the public is voluntary. In compliance with the Privacy Act of 1974, the following information is provided: Solicitation of the information requested on this form is authorized by Title 40 U.S.C. Section 491. Disclosure of the information by a Federal employee is mandatory as it is the first step in the Government's investigation of a motor vehicle accident. The principal purposes for which this information is intended to be used are to provide necessary data for use by legal counsel in legal actions resulting from the accident, and to provide accident information/statistics for use in analyzing accident causes and developing methods of reducing accidents. Routine use of the information may be by Federal, State or local governments or agencies, when relevant to civil, criminal, or regulatory investigations or prosecution.

STANDARD FORM 94 BACK (REV. 2-83)

**Appendix 13
(Chapter 4, Paragraph 27 (a))
Sample**

“Log of Government Vehicle Usage”

Office: _____

Vehicle Tag Number: _____

| Driver's Name | Driver's License Number | Destination | Departure | | Return | | Mileage | | Amount of Credit Card Purchase |
|---------------|-------------------------|-------------|-----------|------|--------|------|-----------|--------|--------------------------------|
| | | | Date | Time | Date | Time | Beginning | Ending | |
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Sample Appendix 14
(Chapter 4, Paragraph 27 (b))
Sample
U. S. SMALL BUSINESS ADMINISTRATION
“Log of Government Vehicle Usage Between Home and Work for Field Work”

Vehicle Tag Number: _____

| Employee Name & Title | Employee Residence | Period of Home-to-Work Determination | Purpose | Dates Used | | Mileage | | Amount of Credit Card Purchase |
|-----------------------|--------------------|--------------------------------------|---------|------------|----|-----------|--------|--------------------------------|
| | | | | From | To | Beginning | Ending | |
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Appendix 15
(Chapter 4, Paragraph 27 (c))
Sample
U. S. SMALL BUSINESS ADMINISTRATION
“Preventive Maintenance and Accident Log”

Office: _____

Vehicle Tag Number: _____

| Driver's Name | Date of PM | Mileage | | Date of Accident | Mileage | | Amount of Credit Card Purchase |
|---------------|------------|-----------|--------|------------------|-----------|--------|--------------------------------|
| | | Beginning | Ending | | Beginning | Ending | |
| | | | | | | | |
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