

Lifespan System-Wide Policy

**Subject: Procurement of
IS Hardware/Software and
Other Computer-Related
Equipment**

File Under: Materials Management

Issuing Department:
Supply Chain Operations

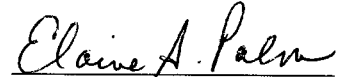
Latest Revision Date:

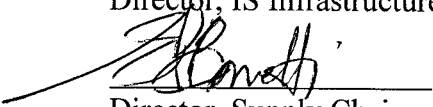
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Approved By:

Policy No.:
MM-205


Director, IS Infrastructure


Director, Supply Chain
Operations


Vice President, Finance


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I. Purpose:

To define the required procedures relating to the procurement of all computer hardware purchases, including desktops/laptops and electronic devices; also dealt with by this policy is related software, including subscriptions and other peripherals. This policy covers planned acquisitions of information technology hardware and software regardless of the funding source (e.g., budgeted item, grant, professional allowance), and applies to all users of personal computers and electronic devices owned by Lifespan and its affiliates.

Special situations may require a modified or completely different procurement process. In these situations, users should consult the Lifespan Technology Center and/or the Lifespan Purchasing Department.

II. Policy:

- 2.1.1 Lifespan's Technology Center (the Tech Center) maintains a large supply of small computer equipment including keyboards, external drives, cables, and various software, as well as cell phones and iPads. See Pages 6 and 7 for a listing of products available for purchase through the Tech Center.

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- 2.1.2 The Lifespan Help Desk should be contacted if a computer or printer is in need of repair. All printers should be purchased by following the process outlined on the Intranet/Administrative/Standards/PC Peripherals: http://intra.lifespan.org/homepage/documents/pc_peripherals.pdf. The Technology Center requires the approval of the Purchasing Manager to purchase non-standard printers. The Purchasing Manager will evaluate each request in terms of need and in relation to the managed print program.
- 2.1.3 Items valued at \$1,000 or more are not sold by the Tech Center. A purchase requisition must be completed and forwarded to the Lifespan Purchasing Department for items costing \$1,000 or more. Please refer to Lifespan Finance Policy FIN-9, “Fixed Asset Capitalization”. The resultant purchase order will ensure that sales tax is not added to the purchase cost, in accordance with the sales tax exemption of Lifespan and its affiliates.
- Please also refer to Lifespan Supply Chain Operations Policy MM-110, “Preparation of Purchase Requisition” for additional procedures.
- The purchase order allows for compliance with Lifespan IS policies IS-205, “Lifespan Software Procurement Process for Desktop and Laptop Computers”, and IS-206, “Lifespan Hardware Procurement Process for Desktop and Laptop Computers including Printers”, as well as Lifespan Finance Policies FIN-15, “Approval Guidelines”, and FIN-21, “Use of Check Requests, Employee Expense Reimbursement Vouchers, and Non-Employee Expense Reimbursement Vouchers”.
- 2.1.4 Employees purchasing standard hardware/software must go to Dell Computer’s website which is found on Lifespan’s Intranet website. See: <http://intra.lifespan.org/#Administrative> and select “PC Configurations” under the “Standards” caption.
- 2.1.5 Employees who do not follow Lifespan policy by purchasing computers or other computer-related equipment, including software, from outside stores/vendors using personal funds will not be fully reimbursed.
- 2.1.6 Any reimbursement to a Lifespan employee for a computer, software program, device, or other peripheral, unless purchased with a professional allowance, is Lifespan’s property upon the employee leaving the Lifespan workforce.
- 2.1.7 The purchase of items used for research that are valued at \$1,000 or more must be approved by the Office of Research Administration regardless of whether or not the funding source is a restricted/incentive fund.
- 2.1.8 Personalized iPads will not be reimbursed.

III. Procedure:

3.1 Standard Software Procurement Process

For all standard software, please contact the Lifespan Tech Center at extension 4-3811.

3.2 Lifespan Non-Standard Supported Software Procurement

- 3.2.1 Determine the non-standard Lifespan IS-supported software required for procurement. For assistance with determination of Lifespan IS support and cost estimates, please contact the Lifespan Technology Center, the Lifespan Help Desk, or the Lifespan IS Infrastructure Department.
- 3.2.2 User completes a Lifespan purchase requisition with the required information listed for procurement. All purchase requisitions completed for the procurement of non-standard Lifespan software must be accompanied by a letter of justification addressed to the Supervisor, Lifespan Technology Center, describing the need to procure non-standard software. The procurement should be based on one of the following criteria or other legitimate reason(s):
- Required by written contract
 - Required by government regulations
 - Endorsed application requirement
 - Special needs requirement
 - Required due to hardware integration

Please forward the completed purchase requisition and letter of justification to the Lifespan Technology Center for approval determination. Please also refer to Lifespan Information Services Policy IS-205 “Lifespan Software Procurement Process for Desktop and Laptop Computers”, for further purchase requisition process information.

IV. Software Copyright Compliance

- 4.1 No personal computer software may be installed, copied, or used on any computer owned by Lifespan or any Lifespan affiliate, except as permitted by the software license agreement. Please refer to Lifespan Information Services Policy IS-203, “Software Copyright Compliance”, for compliance procedures.

V. Procedures for Procurement of Standard and Non-Standard Hardware Packages

- 5.1 For the procurement of Standard and Non-Standard Hardware for use on network file servers throughout Lifespan, please contact the Director of IS Infrastructure through the Lifespan Help Desk at extension 4-6381.

VI. Lifespan Standard and Non-Standard Supported Hardware Procurement

For all standard hardware purchases, see: <http://intra.lifespan.org/#Administrative> and select “PC Configuration” under “Standards”.

6.1. Lifespan Non-Standard Supported Hardware Procurement

6.1.1 Determine the hardware required for procurement. For assistance with hardware determination and cost estimates, contact the Lifespan Technology Center, the Lifespan Help Desk, or the Lifespan IS Infrastructure Department.

6.1.2 User completes a Lifespan purchase requisition with the required information listed for procurement. All purchase requisitions completed for the procurement of non-standard Lifespan hardware must be accompanied by a letter of justification addressed to the Lifespan Director of IS Infrastructure describing the need to procure non-standard hardware. The procurement should be based on one of the following criteria or other legitimate reasons(s):

- Required by written contract
- Required by government regulation
- Endorsed application requirement
- Special needs requirement
- Required due to additional hardware integration

Please forward the completed purchase requisition and letter of justification to the Lifespan Director of IS Infrastructure for approval determination. Please also refer to Lifespan Information Services Policy IS-206, “Lifespan Hardware Procurement Process for Desktop and Laptop Computers, including Printers”.

VII. Confidential Information–Data Protection Controls

7.1 Security of confidential electronic information is the responsibility of Lifespan employees. Lifespan workforce members should follow the “minimum necessary” guidelines when creating and storing confidential information. Please refer to Policy CCPM-66, “Policy Regarding Minimum Necessary Protected Health Information”, at <http://intra.lifespan.org/compliance/privacy/policies/CCPM-66.pdf> for further information.

7.2 When equipment is removed from the secure Lifespan location to an outside location, for example, while traveling with a laptop to a conference or while attending a conference, confidential information must be securely stored, locked, password protected, and encrypted.

- 7.2.1 All confidential data must be removed from electronic equipment before the equipment is available for re-use or is disposed of. Please refer to Lifespan Information Services Policies IS-207, “Lifespan PC Transfer and Re-Image Policy” and IS-209, “Confidential Information – Data Protection Controls Policy” for procedures, as well as the Lifespan HIPAA Security Procedure 92.2, “Device and Media Disposal Procedure”. Lifespan Information Services should be immediately contacted and the following steps taken:
- a. Information Services’ Infrastructure Group (the IS Group) identifies devices for disposal after evaluating the device’s condition.
 - b. The IS Group keeps devices secure in a holding area until a third-party disposal company collects and destroys these devices.
 - c. The IS Group collects and maintains the receipts or destruction certificates provided by the third-party disposal company to serve as disposal logs.
 - d. All users are required to report any lost or stolen equipment or media containing confidential information immediately through the Lifespan HIPAA Security Procedure 85.1, “Incident Response Procedure”. See HSP-85.1 at <http://intra.lifespan.org/compliance/security/documents/>.

VIII. Lifespan-Issued Cell Phones

- 8.1.1 The Lifespan Tech Center should be immediately contacted in the event that a Lifespan-issued cell phone is broken or lost. All Lifespan-issued cell phones have insurance coverage on the device that would cover most damages. The Tech Center will then advise the employee on the course of action to be taken.
- 8.1.2 Employees who purchase iPhones from outside stores/vendors will not be fully reimbursed
- 8.1.3 Residents using an educational allowance to purchase iPhones do not need to seek Information Services’ approval, because the phones are not deemed to be the property of Lifespan

Related Policy References

MM-110 - Preparation of Purchase Requisition

FIN-9 - Fixed Asset Capitalization

FIN-15 - Approval Guidelines

FIN-21 - Use of Check Requests, Employee Expense Reimbursement Vouchers, and Non-Employee Expense Reimbursement Vouchers

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IS-203 - Software Copyright Compliance

IS-205 - Lifespan Software Procurement Process for Desktop and Laptop Computers

IS-206 - Lifespan Hardware Procurement Process for Desktop and Laptop Computers including Printers

IS-207 - Lifespan PC Transfer and Re-Image Policy

IS-209 - Confidential Information - Data Protection Controls Policy

HIPAA Security Procedure 92.2 - Device and Media Disposal Procedure

HIPAA Security Procedure 85.1 - Incident Response Procedure

CCPM-66 - Policy Regarding Minimum Necessary Protected Health Information

IS Software and Equipment Available for Purchase Through the Lifespan Technology Center

Microsoft Office/Adobe

iPads and accessories

Cell phones/Smart phones

Memory upgrades for PCs (often requires a Lifespan technician to review exact requirements by examining the PC)

Desktop and Barcode scanners

Label writers

Laser pointers

LCD projectors

Security locks for desktops and laptops

Computer speakers

Surge protectors

Webcams/Digital cameras

Laptop batteries

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AC adapter replacements

Keyboards, mice

External drives/Flash drives/Thumb drives

HDMI cabling

USB accessories

Speaker phones/Headphones

Other accessories

Note: No item valued at \$1,000 or more are sold by the Tech Center. For any item(s) valued at \$1,000 or more, a Lifespan purchase requisition must be completed and forwarded to the Lifespan Purchasing Department.