

# OREGON STATE HOSPITAL

## POLICY ATTACHMENT

**PROCEDURES A:** Oregon State Hospital Information Technology (IT) Purchase Process      **POLICY: 1.005**

**POINT PERSON:** Director of Technology Services

**APPROVED:** Superintendent      **DATE: APRIL 21, 2023**

**SELECT ONE:**

<input checked="" type="radio"/> New policy attachment	<input type="radio"/> Minor/technical revision of existing policy attachment
<input type="radio"/> Reaffirmation of existing policy attachment	<input type="radio"/> Major revision of existing policy attachment

RESPONSIBLE PERSON/GROUP	PROCEDURES
Oregon State Hospital (OSH) Requestor	<ol style="list-style-type: none"> <li>1. Identify an IT asset need.</li> <li>2. Check the OIS Our Work Link (OWL) page for standard or commonly ordered items and review the OSH BuyTech frequently asked question document.</li> <li>3. Determine if the item is for a patient care area.                             <ol style="list-style-type: none"> <li>a. If the item is for a patient care area, staff must complete the OSH Purchase Safety Checklist form to complete an initial assessment of the item, which includes but is not limited to:                                     <ol style="list-style-type: none"> <li>i. Reviewing room risk levels per OSH policy 8.009, "OSH Safety Program."</li> <li>ii. Viewing the log of completed Product Risk Assessments (PRA) maintained by the OSH Safety department.</li> <li>iii. Completing a PRA request per Procedures B of OSH policy 4.018, "OSH Purchase and Maintenance: Supplies, Assets, and Equipment," for items that do not have a PRA. Items that may be similar to an item with a completed PRA require a PRA of their own.</li> <li>iv. Conferring with Salem or Junction City Facilities departments about installing product in OSH buildings.</li> </ol> </li> </ol> </li> <li>4. When the item has a completed PRA, or if a PRA is not required (i.e., product used in non-patient care area only), staff must submit a product order to OSH Warehouse using the hospital's electronic internal product ordering system if the item is available through the OSH Warehouse.</li> </ol>

	<p>5. If the item is not available through the OSH Warehouse, email Office of Information Services (OIS) Information Technology Asset Management (ITAM) to request a price quote and item availability.</p> <p>NOTE: Quotes received from ITAM are valid for 30 days after they are issued. Quotes that have expired (on day 31 and beyond) require a new quote. Each new IT asset request requires a new quote, even if staff are newly requesting a previously quoted item within the 30-day timeframe.</p> <p>6. If the product is not available, start the process again with a new item or find an alternate solution.</p> <p>7. If the product is available, complete the IT Purchase Request/Acquisition (MSC 0075) form maintained by Shared Services, including clear and accurate billing codes, order type, requested hardware or software, and business need.</p> <ul style="list-style-type: none"><li>a. Staff may contact OSH Buy Tech for assistance and instructions for completing the MSC 0075 form.</li><li>b. Contact OSH Business Analyst office for assistance with department fund codes (agency, index, PCA).</li><li>c. Complete the address section for the appropriate OSH campus address where the item should be delivered.</li><li>d. The business need for the request must clearly justify why a request should be approved. For example, business need statements may identify an issue and state how the request solves the issue. Business need statements also may list alternate solutions and reasons for rejecting the alternate solution. Forms without a business need or without an adequate business need may be rejected. Contact OSH Technology Services for assistance with business need statements.</li></ul> <p>8. <u>Exception Process Only:</u> If the request is related to an ADA accommodation, email the ITAM quote and completed MSC 0075 form to Human Resources for approval.</p> <p>9. Email the ITAM quote, completed MSC 0075 form, and Human Resources approval (if applicable) to OSH BuyTech. Allow up to 5 business days for a reply from the OSH BuyTech Team.</p> <p>10. Cooperate with OSH BuyTech to correct any missing information or form errors if the request is returned. If staff do not reply to correct the missing information or error within 8 business days, the purchase request may be closed.</p>
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	<p>11. If OSH BuyTech determines the item is not compatible, start the request process again with a new item or find an alternate solution.</p> <p>12. If the purchase is approved by OSH BuyTech, the Approving Manager, Human Resources (for ADA accommodation exception requests only), and the Chief Financial Officer/Chief Operating Officer (CFO/COO) (for exception requests only), email OIS ITAM with:</p> <ul style="list-style-type: none"><li>a. The completed MSC 0075 form,</li><li>b. OIS ITAM-provided quote,</li><li>c. OSH BuyTech approval,</li><li>d. Approving Manager approval,</li><li>e. Human Resources approval (if applicable), and</li><li>f. CFO/COO approval (if applicable).</li><li>g. OIS ITAM shall respond with a tracker number or further instructions if an order cannot be accepted as submitted. OSH Requestor must follow up within 5 business days or the purchase request may be closed.<ul style="list-style-type: none"><li>i. Once submitted by OSH, OIS ITAM processes equipment exception requests internally per Shared Services policy ODHS/OHA 070-007-01.</li><li>ii. Note that OSH approvals do not assure that IT asset items will be purchased and provided as requested. OIS ITAM may reject requests that have been approved internally by OSH.</li></ul></li><li>h. Use the ITAM-provided tracker number for any follow-up on the IT purchase.</li></ul>
OSH BuyTech	<ul style="list-style-type: none"><li>1. Review requests for completeness. Forms that are missing information or that are not accompanied by an appropriate quote from ITAM will be sent back to the OSH Requestor. If a request is left open for more than 8 business days from OSH BuyTech requesting additional information, the purchase request may be closed and no further action taken.</li><li>2. Review requests for compatibility.<ul style="list-style-type: none"><li>a. Requests that are not compatible will be sent back to the OSH Requestor.</li><li>b. ADA requests that are not compatible will be sent back to the OSH Requestor and Human Resources. Work with the OSH Requestor and Human Resources to determine an</li></ul></li></ul>

	<p>alternate solution that meets the OSH Requestor's ADA accommodation needs.</p> <ol style="list-style-type: none"><li>3. If the request is compatible, notify the OSH Requestor and OSH Approving Manager as listed on the MSC 0075 form of approval via email. Attach the MSC 0075 form to the approval email.</li></ol>
OSH Approving Manager	<ol style="list-style-type: none"><li>1. Review MSC 0075 form for accuracy and completeness. Correct any errors in coding, order type, hardware or software or business need. Incomplete, inaccurate, or vague forms may be rejected by ITAM.</li><li>2. Forward all exception requests to the CFO/COO for review and approval.</li><li>3. If the purchase is not approved, notify the OSH Requestor of the declination with the reason the purchase was rejected. Copy OSH BuyTech in the notification email for tracking purposes.</li><li>4. If the purchase is approved, email an approval message to the OSH Requestor.</li><li>5. Update the Workstation Tracker Database, any staff equipment tracking forms (MSC 0050), and/or Flexible Work Solution agreements per OSH policy 5.031, "Flexible Work Solutions," as appropriate as purchases are completed and delivered.</li></ol>
CFO/COO	<ol style="list-style-type: none"><li>1. Review exception requests.</li><li>2. Send approval or denial to the Approving Manager.</li></ol>
OIS Information Technology Asset Management (ITAM)	<ol style="list-style-type: none"><li>1. Review requests for completeness.</li><li>2. Respond to OSH Requestor, the approving manager, and OSH BuyTech (as appropriate) with an order tracker number or additional information if the order cannot be completed as submitted.</li><li>3. If the request is appropriate, complete purchase per OIS ITAM IT purchase processes.</li><li>4. Notify OIS Desktop Support Team if support is required as part of order fulfillment.</li></ol>
OIS Desktop Support Team	<ol style="list-style-type: none"><li>1. If support is required as part of ITAM order fulfillment, contact the OSH Requestor or end user as listed on the MSC 0075 form to complete delivery/setup.</li></ol>