

Technology Requisition Policy

1. Purpose

This policy establishes the standard process for requesting, reviewing, and approving all technology solutions and IT equipment at Plum Dental. It ensures alignment with organizational goals, regulatory requirements, and technical standards.

2. Scope

Applies to:

- All departments requesting new technology
- All purchases of software, SaaS, or IT-related hardware
- All employees at HQ and clinic locations

3. Request Categories

A. Technology Solutions (Software)

Includes:

- Practice management software, medical/dental apps
- Communication platforms (e.g., chat, messaging)
- AI-enhanced tools (e.g., diagnostic analytics, imaging)
- Any tool handling PHI or business-critical data

B. IT Equipment (Hardware)

Includes:

- Laptops, desktops, tablets, phones
- X-ray sensors, clinical workstations, headsets, etc.
- Replacements or additions to the current asset inventory

4. Requisition Process (Both Categories)

Step

Description

Owner

1. Submit Request	Form TBD	Requesting Department
2. Initial Review	IT evaluates technical feasibility, compliance, and viability	Systems & Technology Manager
3. Vendor/Quote Review	IT shortlists vendor(s) or hardware	IT
4. Approval	CFO or designated executive signs off	CFO / Sponsor
5. Project Setup	If approved, a project is created in Monday.com under owning department	IT / Project Manager
6. Procurement & Deployment	Finalized by IT and/or department lead	IT + Dept Lead

5. Special Considerations

- **Software involving PHI** must undergo HIPAA compliance review.
- **Hardware** must align with IT standards for supported devices.

6. Exceptions

Any exceptions to this policy must be approved by the Systems & Technology Manager and an Executive Sponsor.

“☐ This policy ensures all technology decisions at Plum Dental are strategic, secure, and scalable.”

Revision #2

Created 30 April 2025 18:52:43 by Admin

Updated 30 April 2025 18:53:20 by Admin