

Title	Technology Purchase Guidelines
Guidance Document	Hardware and Software
Responsible Office	Office of Technology and Strategic Services (OTSS)
Subject	Procedures governing the purchase of technology
Originate Date	9/27/18
Last Revision Date	8/22/2019

1.0 Scope

The Office of Technology and Strategic Services (OTSS) has reviewed the technology purchasing and receiving processes. OTSS took into consideration, the questions and comments received from purchasing, budgeting, compliance and asset management staff. As a result, OTSS has developed a more streamlined technology purchasing and receiving process. The steps outlined in this document have been approved by the Offices of Accounting and Budgeting.

All technology purchases must have the prior written approval from OTSS regardless of the funding source.

2.0 Purpose

This document provides guidelines for the purchase of equipment/hardware and software to ensure that all technology for the agency is appropriate and integrates with MDE's Network and Systems. These resources include, but are not limited to:

- Desktops, laptops, mobile devices
- Computer Peripherals (e.g., servers, printers, scanners, etc.)
- Software including, but not limited to, Internet downloads, utilities, add-ins, programs (including shareware, freeware and Internet access software), patches or upgrades
- Audio-visual equipment, such as projectors

3.0 Software/Equipment/Hardware Purchase Procedures

Program offices wishing to make an equipment/hardware/software technology purchase must:

1. Ensure there is adequate budget authority to make the purchase. All purchases are subject to the availability of funds.
 - a. Authorized signature by person responsible for verifying budget will sign blue and white technology purchase request form.
2. Send an email to mdenet@mdek12.org with the subject line "**Technology purchase approval request.**"
 - a. Attach the blue and white technology purchase request form (signed by your Office Bureau Director) to mdenet@mdek12.org. The form can be downloaded from the OTSS web page ([click here](#)).

- b. If you are providing your own quote, attach the quote to the email. If you do not have a quote, OTSS will provide a quote for you.
 - 1. Products \$5,000 or less- 1 quote
 - 2. Products \$5,000.01 - \$50,000- 2 quotes
 - 3. Products \$50,000.01 or more - will require request for bid/Mississippi Department of Information Technology Services (ITS) approval
 - c. After review, OTSS will return the technology purchase request form and quote to the program office with OTSS approval signatures and then the purchase can be made following MDE policies and procedures.
 - d. In the event the purchase is not approved, OTSS will return the technology purchase request form to the program office marked "Disapproved", and the program office cannot proceed any further with the procurement.
3. Upon approval of the Technology Purchase Request, the program office making the purchase should submit the following documentation to the Office of Procurement for approval of a Purchase Order.
- a. Request for Goods and Services Form (Requisition)
 - b. Technology Purchase Request Form (Approved by OTSS)
 - c. IT Plan, Approved by ITS (for purchase request after October)
 - d. Quotes (provided by requesting program office or OTSS)
 - i. Products \$5,000 or less- 1 quote
 - ii. Products \$5,000.01 - \$50,000- 2 quotes
 - iii. Products \$50,000.01 or more – will require request for bid/ITS approval
 - iv. Products on EPL can be purchased by agency up to the EPL amount. Refer to ITS procurement manual for approved threshold at <http://www.its.ms.gov/Procurement/Documents/ISS%20Procurement%20Manual.pdf#page=1>. The table on page 124 defines the procedures and the required approvals for each category and project lifecycle cost range.
4. Once all approvals are received, the program office will submit documentation to the Office of Procurement for processing.

4.0 Special Circumstance Procurements

- 1. For quotes that require a signed agreement for hardware and/or software purchases, the program office will include in their packet the following items in addition to the documentation listed above (section 3.0 (3)):
 - a. the Contract Justification-Information Technology (IT) Related Products and Services Form (located on the Office of Procurement webpage)
 - b. the signed agreement
 - c. all supporting documents approved by OTSS
 - d. The program office will date stamp the top copy of the packet and place it in Procurement's contract inbox for contractual processing.
- 2. For quotes that do not require a signed agreement for hardware and/or software purchases, the program office will submit documentation listed above (section 3.0 (3)) to the Office of Procurement for Purchase Order processing. Upon approval of the request, the Office of Procurement will generate the Purchase Order and send the approved PO to the program office.

3. For ITS approved procurements/contracts, OTSS will provide the program office with CP-1 approval received from ITS. **Upon receipt of the CP-1 and prior to the start of services**, the program office making the purchase shall submit the following documentation to the Office of Procurement purchasing inbox for Purchase Order processing:
 - a. Request for Goods and Services Form (Requisition) with MAGIC contract number affixed
 - b. A copy of the approved CP-1

5.0 Information Technology Services (ITS) Purchases

All Department IT related equipment, software, and services \$50,000.01 or more must be procured through OTSS. OTSS will coordinate all Department contact with ITS and will complete and/or approve any technology-related contracts in conjunction with ITS.

6.0 Information Technology (IT) Plan

Mandated by Mississippi Legislation, all agencies are required to prepare an annual Information Technology (IT) plan for submission to ITS. On behalf of MDE, in the development of the agency's IT plan, the CIO will reach out to each Program Office Chief in preparation of gathering the necessary information needed for submission. This information and supporting documentation is submitted to ITS for evaluation and approval. Technology Plans are usually due by September 1st of each year.

The technology plan should reflect your anticipated purchases in the following IT-related categories: software, hardware (including laptop/desktop equipment), applications, systems and services. **Including these items in your program office's technology plan will help with the IT procurement process later. Failing to submit your program office's technology plan by the due date will result in the delay or disapproval of IT-related purchases.**

7.0 OTSS' Commitment to the Process

OTSS will:

- Provide technical assistance which meets the department needs and requirements
- Obtain the most cost-effective price and/or services
- Promptly deliver and install equipment and software

Please contact the Help Desk at 601-359-2837 or e-mail mdenet@mdek12.org for all other IT inquiries.

8.0 Additional Provisions

- MDE/OTSS has purchased site licenses and/or volume licenses for many software packages, and It is possible that the software you need is already available at no additional cost. Please contact OTSS for more information.
- Some purchases may require additional processing or approvals under existing procurement policies and procedures (i.e., EPL, sole source vendor, purchases in excess of Agency's planned purchase limit, etc.).
- At a minimum, all equipment must be tagged as an asset for inventory purposes.
- For questions regarding MDE cell phones and devices with data plans, please contact Lee Bray at lbray@mdek12.org or call 601-359-3487.