| Policy Title: | **Hospital HIS MM Item Policy - Creation, Amendment, Deactivation, Reactivation and Naming Convention.** |
|---|---|
| Policy Sponsor | SSW Vice President, Corporate Services & Chief Finance Officer |
| Approved by: | CFOs Forum |
| Approval Date: | November 20, 2020 |
| Issue Date: | October 19, 2020 |
| Next Review Date: | 1 year from Issue date |
| Page Number: | Page 1 of 19 |
| Purpose: | To outline the process, roles & responsibilities and controls related to Item creation, amendment, deactivation, reactivation and naming convention. |

## 1. Key Definitions and Acronyms

a) "Hospital" means a Member or Customer of Shared Services West (SSW).

b) "Hospital Senior Leadership Team" as defined by the hospital from time to time.

c) "MM" stands for Materials Management, which is the planning, directing, controlling and coordinating of activities concerned with products, goods, services, materials and inventory requirements. There is an MM module within the Hospital Information System (HIS).

d) "DM" stands for Data Management, which is a department at SSW that completes many of the CARDS requests, including item changes impacting the Hospitals' MM module.

e) "Item Dictionary" is the list of all items which can be purchased in the Hospital's HIS MM module. An item or product can be either "physical goods", equipment, software, or services. Typically, the Item Dictionary includes item description, product code, vendor, and pricing data which is used throughout the MM module.

f) "Inventory" refers to a location either physical or virtual that holds individual items; the group of these items is referred to as Stock. Each Inventory has its own unique Stock Dictionary.

g) "Stock Dictionary" is the term for the subset of items from the HIS MM Item Dictionary that are designated to be active within an Inventory. The Stock Dictionary is unique to each Inventory. All items appearing in a Stock Dictionary are already created in the HIS Item Dictionary. A single Item may appear in multiple Stock Dictionaries.

h) "Inventory Owner" is the SSW Logistics Manager or Hospital Department Manager who has the responsibility for oversight of a specific Inventory. The Inventory Owner has the responsibly to decide what items will be kept as stock in an Inventory, as well as at what minimum levels (i.e. PAR levels) the items are replenished and, with consideration to the suppliers order quantities, in what increments the items are replenished or reordered.

i) "CARDS" is a website where data requests are submitted to SSW DM for approval and processing. The website is accessible to SSW employees and Hospital users, typically via the hospital intranet. CARDS is an acronym for Create Amend Reports Deactivate SSW - capturing the five types of data requests submitted to SSW Data Management.

j) "UNSPSC" stands for United National Standard Products and Services Code.

k) "GS1" stands for Global Standards One. GS1 is a not-for-profit international organization that develops and maintains global standards for business communications allowing for the easier identification and sharing of common supply chain data using electronic means across various organizations. SSW Data Management utilizes GS1 standards in maintaining the naming conventions of items within the Item Dictionary.

## 2. Purpose

SSW Data Management and the Hospital have shared roles and responsibilities in maintaining updated and accurate items in the Item Dictionary within the Hospital HIS Materials Management (MM) module to:

- Allow appropriate spend analysis and the identification of sourcing opportunities for goods and services within a Hospital and/or across all SSW Hospitals by standardizing item records and naming conventions where possible.
- Ensure accurate and complete item procurement reporting to assist in the identification of items at risk due to alerts, recalls, and back-orders.
- Reduce the amount of effort required to requisition products and services by end users.
- Establish controls which maximize the accuracy and efficiency of SSW Purchasing and Logistics through the minimization of duplicate items and enhance best practices regarding inventory management.
- Track products being brought into the Hospital premises for trial, product evaluation or research purposes.
- Outline the roles and responsibilities for the governance, data entry, and overall management of HIS MM Dictionaries.
- Reduce ambiguity in responsibilities and clearly delineate roles through segregation of duties in order to improve data accuracy, and maintain operational efficiencies.

## 3. Scope

The scope of MM activity managed by SSW is determined by the Member Hospitals' Equity Members Service Agreement (EMSA) and the Customer Hospital's Service Level Agreement (SLA).  This policy applies to all SSW Hospitals HIS MM modules as well as other systems which interface with, or are directly dependent on, the Item Dictionary information. (e.g., Perioperative Information Management Systems (PIMS), etc.)

For other Hospital systems that are not directly dependent of the HIS MM Item Dictionary, this policy may apply.  A thorough review and agreement by Hospital Finance, the applicable Hospital system owner and SSW DM will be performed to determine the applicability of this policy to such systems.

This policy covers the entire end to end process for item creation, amendment, deactivation and reactivation from the initial submission to SSW DM to the timely completion and implementation of the valid request.

This policy includes the standard naming for data fields within the Item Dictionary which applies to creation of new items entries or amendment to existing item entries.

This policy details the responsibilities of SSW and Hospital Users relating to the complete processing and validation of HIS MM item requests.

The conventions for Hospital HIS MM modules for Item Directory pertaining to Pharmacy items are limited.  "Drug" items are out of scope of this policy.  "Non-drug" items are in scope.

Revisions to this policy will be reviewed annually.

## 4. Background information

The Hospital HIS MM Item Dictionary continuously grows and evolves as new vendors, new contracts and new lines of businesses result in new items being created and current items needing to be amended with updated information.  Past practices often had new items being added to existing MM Item Dictionaries without removing items that were no longer needed (e.g. discontinued Items).   This Item Policy addresses how to rectify this deficiency be implementing better data management controls and processes.

Once an item is created, the data can only be amended or deactivated. Items cannot and should not be deleted from MM Item Dictionary so historical records of transactions and purchases can be maintained. Deactivation of an item limits whether the item can be ordered but does not remove it from the Item Dictionary. Items which are deactivated can be reactivated if continuing use of the item is subsequently required.

Within the Item Dictionary, **an item record** has two levels of information.  One is the item **header**, which includes information that pertains to the item regardless of where it is purchased from and the **second** level of information pertains to the item directly linked to the vendor it is purchased from.

The information that is included at the item **header** level includes:

- Unique Item # (system-generated)
- Item description
- Item Common Name
- Item Category
- Allergens / Hazardous information
- Implantable
- Tax status
- Packaging String
- Procedure Code
- Expense Object Code (EOC)

The information that is included at the **second** item / Vendor level is:

- Vendor catalogue #
- Unit of Purchase
- Price
- Manufacturer
- Manufacturer Catalogue #
- Global Trade Item # (GTIN)
- Contract #
- Contract Expiry date

A key variable in Item creation is the manufacturer.  The same product from a different manufacturer must be created in the Item Dictionary with a separate unique item number.

Unfortunately, the identification of suitable substitutes for items in the ITEM Master Dictionary cannot be maintained within the current HIS MM modules but rather via an external database managed by SSW.

## Policy Statements

**5.1** Item creations on the Hospital's HIS MM module will only be done where required for conducting official Hospital business. Item creations for conducting personal business or SSW's own business operations will not be permitted under any circumstances.

**5.2** Access to the HIS MM module regarding item creation, amendment, deactivation and reactivation functionality in the system will only be granted to authorized SSW Data Management (DM) Team members.

To maintain appropriate segregation of duties, no SSW or Hospital individual having direct transaction processing capabilities in the MM module will be granted direct or indirect access to the item functionality in the MM module (including but not limited to SSW Sourcing, SSW Purchasing, SSW Logistics, Hospital Requisitioners, Hospital Owners of other systems dependent on MM Item Dictionary information, etc.)

**5.3** All new item creation requests must meet all of the following criteria prior to creation of a new item in the MM module:

- Item does not already exist in Item Dictionary (DM to confirm when request is submitted),
- Item is intended to be purchased by a Hospital department,
- Documented evidence (vendor letter, corporate email, contract pricing schedule) is provided verifying item details (e.g. catalogue #, pricing, packaging string, manufacturer, etc.; if applicable the SSW initiative/contract #).
- Vendor which the Item is to be purchased from already exists in the HIS Vendor Dictionary.
    - o If not, first, vendor setup is required - refer to Hospital HIS MM Vendor policy.
- Identification of the associated SSW/Hospital Contract number.
    - o If the item requested for creation cannot be verified as currently being on a committed contract between the Hospital and vendor, SSW DM will require written approval from both SSW Sourcing and the Hospital designated individual/committee responsible to coordinate the acceptance of product evaluations, conversions and substitutions, prior to item creation.

- Unique item numbers will be created for each product/goods that are specific to an individual manufacturer.

    - o Note: Unique item numbers are not required for a product/good that is the same Manufacturer catalogue number and available across multiple distributors.

- Post Warranty service items will have a unique item number created, linked to the specific vendor providing the service. (note: see Section 5.6 Miscellaneous items for Service item information when not post warranty)

The addition of items to HIS MM Stock dictionaries will be completed by SSW DM if the required information is included with the request for new item creation. The addition of existing

items to the Stock dictionary and the maintenance of the Stock Dictionary are the responsibility of the Inventory owners, primarily led by SSW Logistics.

**5.4** Item creations should mirror what is expected on the Purchase Order (PO), structure or expected frequency of receipt, and/or how the vendor may invoice/bill the item being procured. For example, if the vendor is shipping the entire unit of capital as one part, only one item number is required. If the vendor will be shipping the unit in multiple parts, an item number should be created for each part to prevent receiving issues and exceptions.

**5.5** All item amendment requests must meet the following criteria prior to being submitted to DM through CARDS:

- Documented evidence (vendor letter, corporate email, and contract) is provided verifying item details of the criteria requested for amendment (e.g. catalogue #, pricing, packaging string, manufacturer, etc.).
- Item is in 'Active' status
    - o   If inactive, item reactivation is required - refer to <u>Item Reactivation</u> section of this policy
- For Items stocked in a Just-in-Time (JIT) Stockless Inventory, approval from Hospital Logistics Manager for amendments that include changes to vendors, vendor catalogue #, manufacturer, packaging string and/or unit of purchase.  Price changes <u>do not</u> require this approval.
- Changes to a Vendor catalogue # or Manufacturer Catalogue # for an item require a new HIS MM Item be created – any special circumstances requesting an amendment be made and no new item created require approval from the SSW Manager, Data Management.

**5.6** Miscellaneous items allow for a one to many relationship (i.e. one item is attributable to more than one product, and multiple possible vendors.)

The use of Miscellaneous items should be minimized to maximize the ability to track alerts, recalls, backorders, and to perform appropriate spend analysis which is best performed when each unique product (or product group) is tracked via unique item codes.

SSW Purchasing will monitor and manage the appropriate use of Miscellaneous items, limiting their use on purchase orders as much as possible.

The following outlines the acceptable use of Hospital HIS MM Miscellaneous items.

   i.   **Urgent orders:** If users are unable to wait for item creation, a Miscellaneous item may be used. However, once the urgent order has been placed, a CARDS request must be submitted, within two business days', by the requisitioner (e.g. Hospital individual) or SSW Buyer to create the item for future purchases.
   ii.   **One-time Purchase:**  If the part will only be purchased once for a repair, a Miscellaneous item may be used. One–time purchase items of high value (over $5,000 Cdn) are not to be purchased under a Miscellaneous item but are to have individual unique item number created (see Section 5.3) .

Please see Appendix B for a list of the available approved Miscellaneous items outlined above, along with a brief explanation of their use. New Miscellaneous items, as outlined in (i) and (ii) above, may only be created or reactivated with the SSW Manager, Data Management approval.

iii.  **Contract Specific Items:** In limited situations where the tracking of the amount spent under a specific contract is required, and the items on the contract are not clinical in nature, are large in number, but varied in nature that would make setting up individual numbers prohibitive, a unique MM HIS item specific to the vendor contract will be created.

In these limited cases, the item description is to include the SSW Initiative Tracking System (ITS) number along with the contract title.  Due to space limitation the contract title may need to be abbreviated.
(e.g. for a contract with Dell for computer hardware the item description would be 198765 COMPUTER HDWR-DELL, 198765 representing the SSW ITS number.)

When spend analysis by category is anticipated to be of importance, and a single contract covers a large number of product categories, multiple item numbers for differing category can be requested.  (e.g. item descriptions : 198765 LAPTOP-DELL ; 198765 MONITOR-DELL ; 198765 DESK PC-DELL.)

SSW Data Management will determine the most appropriate item creation for tracking, monitoring, and reporting spend analysis.

iv.  **Non-Post Warranty Service**: If a service is required that is not considered a post-warranty service, the requester should choose the most appropriate Hospital HIS MM item number from the list of existing service item numbers found in **Appendix A.** The appropriate service details will be added to this item number at the Purchase Order stage for the purposes of ordering and reporting.

v.  **Product Evaluation:** A unique alpha-numeric item is to be used to order product for evaluation, trial or research purposes to aid in traceability and reporting.

Each Trial will be required to have a unique item number starting with the letter T and an appropriate item description indicating "TRIAL".

(e.g. Item # T12345 ; Description TRIAL-SURGICAL GLOVES).

The appropriate item specific details (e.g. Brand X Glove Size 5) will be added to this item number at the Purchase Order stage for the purposes of ordering and reporting.

All item creation requests for Trials will required Hospital Product Evaluation & Standardization Coordinator (PESC) or the equivalent Hospital designate approval.

**NOTE: All other purchases require a new MM HIS item created if an item does not already exist in the Item Dictionary.**

**5.7**. The GS1 Standards are to be used for Naming Convention Abbreviations and Standard Code of Measures for Packaging units. This is to ensure consistency for internal abbreviations when they are required to meet description length restrictions in the MM HIS system module, and to minimize inconsistencies during Electronic Data Interchange (EDI) with vendors and other external parties for Units of Measure.

Item creation or amendment requests must conform to the naming conventions as detailed in **Appendix C**; any request received which does not conform to the naming conventions will have the item description altered by SSW DM so as to ensure compliance. The requestor will be advised of the description amendment upon the completion of the request.

**5.8.** SSW DM will have sole discretion as to the determination of whether a requested change shall be processed as a new item creation vs. an amendment to an existing item to ensure compliance to this policy is best matched, that existing HIS MM module functionality is efficiently and appropriately maximized and which alternative best maintains the historical procurement activity of an item. In general, a change to the Manufacturers catalogue number indicates a change to the product and a new HIS MM item is required.

**5.9.** New item creations and amendments will be processed on a timely basis so as to not unduly impede sourcing, purchasing, requisitioning, or logistics. Data Management (DM) will contact the requester 1-2 business days after a request has been submitted.

The timelines for the completion of the request are dependent on volume and complexity of the requests. Completion of the request will be delayed if the requester has not provided complete and accurate information.

For urgent requests (e.g. items required for rush orders), the requester can contact the SSW Manager DM after a CARDS request has been submitted. The SSW Manager DM will assist with making the urgent request a priority for completion, after reviewing the request for urgency.

**5.10** To maintain clean item records in the Item Dictionary, SSW DM will regularly review the Item Dictionary to ensure Item entries are setup following the item conventions outlined in this policy:

      a. Review items that have been created or amended within the previous month.
      b. Identify any missing or incorrect item information (including validating pricing information is correct as per the applicable contract.)
      c. Update the item information following the naming convention guidelines.

**5.11** All of the following criteria must be met in order for an Item to qualify for Item Deactivation:

- Item is not on an active contract;
- Item is not in the Hospital PIMS system;
- Item is not in the OR Supply Cart Management System (e.g. AtPar);
- Item is not attached to a Procedure card/case cost history;
- Item has no open transactions;
- At least one (1) appropriate reason is provided (see below).

At least one (1) of the following reasons must be provided for an Item to qualify for Item Deactivation:

- Item has been discontinued;
- *Item is a duplicate (see note below)
- Item is off-contract following the instatement of a new, on-contract Item;
- The hospital function in which Item is used does not exist anymore;
- Technology required for using Item has changed;
- Item Vendor or Manufacturer has changed;
- Ordering of item is no longer preferred by users (in special circumstances only)

**\*Note:** If item is a duplicate it may not meet all of the required criteria outlined above. It will be up to the discretion of the SSW Manager, DM to determine if the item qualifies for deactivation.

**5.12**. To maintain clean item records in the Item Dictionary, SSW DM will conduct a semi-annual review of all active items. This procedure must be followed semi-annually (twice per year) to ensure that Items that qualify for deactivation are being cleansed.

1) Review Item purchase activity over past six (6) months.
2) Deactivate all Items with no purchase activity for eighteen (18) months, unless:
   - Item is on an active contract;
   - *Item is listed as active within an Inventory (see below note);
   - Item is in the Hospital PIMS system;
   - Item is in the OR Supply Cart Management System (e.g. Atpar);
   - Item is attached to a Procedure card/case cost history;
   - Item has open transactions.
3) Alongside SSW Sourcing Team, identify all new contracts replacing existing contracts.
4) Based on Step 3, deactivate all off-contract Items being replaced by new contract Items.

**\*Note:** If item is in active status within an Inventory, it can only be deactivated with the Logistics Managers or Hospital Department Owners approval.

**5.13** All of the following criteria must be met in order for an Item to qualify for Item Reactivation:

- Vendor and pricing is validated to ensure that the information in the item is correct
- At least one (1) appropriate reason is provided (see below).

At least one (1) of the following reasons must be provided for an Item to qualify for Item Reactivation:

- Item back on an active contract, having previously been off-contract;
- Item put back in circulation, having previously been discontinued;
- Urgent patient need(s) arose that can only be satisfied by a particular Item;
- Medical reason (e.g. allergies to on-contract Item);
- Similar Item currently on-contract is on extended backorder.

**5.14.** On a monthly basis, an audit trail report showing all new item creations and items amendments will be generated. The SSW Manager DM will review transactions made to Item Dictionary records to validate all MM processed changes completed were reasonable, valid, appropriately approved and completed by authorized SSW DM personnel. Any unauthorized personnel access will be actioned immediately, the validity of any changes made verified and reversed within the Item Dictionary as necessary. The audit trail report is generated from the HIS MM module, and shall be appropriately retained after the review has been completed.

## 6. Roles and Responsibilities

The primary policy users and their corresponding responsibilities are as follows:

### 6.1 SSW Data Management Team (DM)

- Working with Hospital IT responsible for ensuring Hospital MM Item creation and amendment access is appropriately restricted to SSW DM staff only.
- Responsible for submitting a request to Hospital IT revoking unauthorized individuals' access, where applicable, in a timely manner.
- Responsible for developing and maintaining a standardized process with appropriate controls on item creation, amendment, deactivation or reactivation requests (i.e. CARDS website) including providing any required and on-going training to System Users.
- Responsible for ensuring appropriate segregation of duties between the requestor and the approver of a request is maintained, when applicable.
- Responsible for validating and processing item creation, amendment, deactivation and reactivation requests submitted through CARDS. Ensures key required item information (e.g. Latex/non-latex) is captured in the appropriate item dictionary fields.
- Responsible for the retention of all supporting documentation regarding Item Dictionary record changes (via the CARDS system).
- Responsible for ensuring item requests meet policy requirements prior to making changes to MM Item Dictionaries. If the policy requirements have not been met, DM

will inform the requester via email providing the rationale and what, if any, further action should be taken.

- Responsible to review the Expense Object Code (EOC) to be associated with any new items requested for creation; contacting Hospital Finance for clarification as necessary.
- Responsible for the appropriate and minimal creation of Miscellaneous item codes.
- Responsible for reviewing and confirming any CARDS requests for changes to item pricing when the item is indicated as being on a contract in the HIS MM system.
- Responsible for completing Item Deactivation/Reactivation requests, including a semi-annual review of items with no activity in past 18 months.
- Responsible for ensuring appropriate GS1 naming conventions and GS1 Standard Code of Measures format within the Item Dictionary is maintained.
- Reviewing monthly audit trail reports of all MM Item Dictionary Activity and validating changes accordingly.
- Responsible for the overall governance of MM Item Dictionaries as the front line contact.

6.2 **System Users -** Designated Hospital individuals (e.g. Product Evaluation & Standard Coordinators and/or Committees {PESC}), SSW Logistics Team, and SSW Sourcing Team.

- Responsible to notify SSW DM, through CARDS submissions, of all changes required to the HIS MM Item Dictionary. Act as the Subject Matter Experts (SMEs) in assisting Hospital Departments with the process of submitting a CARDS request for an identified need to amend or create an Item within the HIS MM Item Dictionary.
- Responsible for ensuring the request submitted through CARDS includes all the mandatory information including vendor documentation (catalogue #, pricing, packaging string, manufacturer) and key required item information (e.g. latex/non-latex content, etc.).

  Where applicable, obtain explicit written approval from the Hospital designated individual/committee responsible (e.g.PESC) to validate compliance to any applicable Hospital standardization requirements and to coordinate the acceptance of product evaluations, conversions and substitutions, in conjunction with SSW Sourcing (as part of monitoring BPS procurement compliance & current contractual obligations).

- Responsible for ensuring the current item dictionary is well searched prior to submitting a request for a new item creation to avoid unnecessary duplications.
- Responsible to contact Hospital Finance to determine the appropriate Expense Object Code (EOC) to be associated with any new items requested for creation.
- Responsible for ensuring that an item meets the criteria for amendment, deactivation or reactivation prior to submitting the request.

- Responsible for providing documentation from the vendor, when required for off-contract items, along with the reasoning to support creation, amendment, deactivation, or reactivation to SSW DM.
- Responsible for adhering to any approved Data Management policies available on SSW and Hospital intranets.
- Responsible for working collaboratively with SSW Sourcing, SSW Logistics, and designated Hospital individuals responsible for the coordination of acceptance of product evaluations, conversions and substitutions on submissions of CARDS requests.

Hospital Department Users, Hospital Department Managers:

- Responsible for ensuring all Hospital front-line staff received appropriate and timely training on the Hospital's HIS MM system.
- Responsible for adhering to any approved Data Management policies available on SSW and Hospital intranets.
- Responsible for working collaboratively with SSW Sourcing, SSW Logistics, and Hospital designated individuals (such as PESC Coordinators) on submissions of CARDs requests.


**6.3 The Regional Operations Committee** (ROC) is comprised SSW Representatives and Hospital Finance Representatives.

- Responsible for overseeing the governance of the process including policy revisions and obtaining the required Hospital Senior Leadership approval for policy implementation.
- Responsible for internal Hospital communications regarding this policy to the Hospital Users.

## 7. Procedures

The SSW Data Management (DM) Team is solely responsible for completing any changes to the Hospital HIS MM Item Dictionaries. The below outlines the procedures for sending item related requests to the DM Team.

### 7.1 New Item Setup Request (System Users)

This procedure must be followed when submitting an item creation request for the MM Item Dictionary, taking into account that the Policy Statement Requirements are met prior to submitting the request.

1. Navigate to http://card.ssw.ca/cards/
2. Fill in the requester information on the left hand side
3. Select **Create** under the CARDS header.
4. Select **Create Item** from the second row.
5. Complete the required fields (refer to the Item Naming Conventions section of this policy for item field requirements).
6. Electronically upload/attach the vendor letter/email
7. Electronically upload/attach the written approval from the Hospital designated individual/committee responsible to coordinate the acceptance of product evaluations, conversions and substitutions and SSW Sourcing (required for all off-contract items). When Hospital Finance has confirmed the Expense Object Code (EOC) to be assigned the correspondence it to be included.
8. Click Submit.

### 7.2 Amend Item Request (System Users)

This procedure must be followed when submitting an amend item request for the MM Item Dictionary, taking into account that the Policy Statement Requirements are met prior to submitting the request.

1. Navigate to http://cards.ssw.ca/cards/
2. Fill in the requester information on the left hand side
3. Select **Amend** under the CARDS header
4. Select **Amend Item** from the second row.
5. Complete the required fields
6. In the comment section, explain the change required and the reason for the change.
7. Electronically upload/attach the vendor documentation supporting the requested changes. If the amendment is to the Expense Object Code (EOC), supporting correspondence from Hospital Finance is to be included.
8. Click Submit.

7.3. Item Deactivation (System Users)

This procedure must be followed when submitting an Item Deactivation request for the MM Item Dictionary, taking into account that the Policy Statement Requirements are met prior to submitting the request.

1) Once verified, navigate to http://card.ssw.ca/cards/
2) Fill in the requestor information on the left hand side
3) Select **Deactivate** under the CARDS header.
4) Choose **Deactivate Item** from the second row.
5) Complete all fields, including the reason for deactivation.
6) Electronically upload/attach any the vendor documentation supporting the requested deactivation, and written approval from the Hospital designated individual/committee responsible to coordinate the acceptance of product evaluations, conversions and substitutions.
7) Click Submit.

7.4. Item Reactivation (System Users)

This procedure must be followed when submitting an Item Deactivation request for the MM Item Dictionary, taking into account that the Policy Statement Requirements are met prior to submitting the request.

1) Once verified, navigate to http://card.ssw.ca/cards/
2) Fill in the requestor information on the left hand side
3) Select **Amend** under the CARDS header.
4) Choose **Amend Item** from the second row.
5) Complete all fields, including the reason for the reactivation.
6) Electronically upload/attach any the vendor documentation supporting the requested reactivation, written approval from the Hospital designated individual/committee responsible to coordinate the acceptance of product evaluations, conversions and substitutions, and SSW Sourcing (required for all off contract items).
7) Click Submit.

In order to provide further clarity, a responsibility assignment matrix (RACI chart) is included in Appendix E which details the segregation of duties from the submission to the completion of a HIS dictionary update request. Refer to the matrix prior to submitting a request.

**8. Related Policies**

Hospital HIS MM Vendor – Creation, Amendment, Deactivation and Reactivation

**9.  Appendices**
- Appendix A : Service Master Item List
- Appendix B : Miscellaneous Item
- Appendix C : SSW Naming Conventions
- GS1 Standards list (Abbreviations & Measures) pdf version
- Appendix E : Roles & Responsibilities RACI chart

10. **Policy Owner:**

Manager, Data Management (SSW)
Contact: Jo-Ann Ross (905-287-2870 ext. 128)

## Appendix A: Service Master Item List

| Description | Meditech Item Number | | |
|---|---|---|---|
| | THP | HALTON | OSLER |
| SVC-Architecture Consulting | 65081 | 9409745 | 79073 |
| SVC-Audit External | 65079 | 9409743 | 79071 |
| SVC-Boiler Maintenance | 65089 | 9409754 | 79081 |
| SVC-Building Maintenance | 65084 | 9409748 | 79076 |
| SVC-Collection | 65109 | 9409789 | 79101 |
| SVC-Communications Consulting | 65077 | 9409741 | 79069 |
| SVC-Document Scanning | 65108 | 9409787 | 79100 |
| SVC-Document Storage | 65106 | 9409785 | 79098 |
| SVC-Electrical | 65096 | 9409767 | 79088 |
| SVC-Elevator Maintenance | 65082 | 9409746 | 79074 |
| SVC-Engineering Consulting | 65080 | 9409744 | 79072 |
| SVC-Facilities Equipment | 65083 | 9409747 | 79075 |
| SVC-Fire Protection Maintenance | 65071 | 9409734 | 79063 |
| SVC-Food Management | 65103 | 9409782 | 79095 |
| SVC-Generator | 65098 | 9409774 | 79090 |
| SVC-HVAC | 65092 | 9409759 | 79084 |
| SVC-Handyman | 65095 | 9409764 | 79087 |
| SVC-Heating  & Repair | 65090 | 9409755 | 79082 |
| SVC-HR Consulting | 65074 | 9409737 | 79066 |
| SVC-Human Resources Consulting | 65078 | 9409742 | 79070 |
| SVC-IT Consulting | 65070 | 9409739 | 79062 |
| SVC-Janitorial | 65086 | 9409750 | 79078 |
| SVC-Landscaping | 65088 | 9409752 | 79080 |
| SVC-Landscaping Snow Removal | 65072 | 9409735 | 79064 |
| SVC-Laundry & Linen | 65091 | 9409758 | 79083 |
| SVC-Management Consulting | 65075 | 9409738 | 79067 |
| SVC-Medical Gas | 65099 | 9409771 | 79091 |
| SVC-Operating System Maintenance | 65073 | 9409736 | 79065 |
| SVC-Parking Maintenance | 65105 | 9409784 | 79097 |
| SVC-Pest Control | 65097 | 9409769 | 79089 |
| SVC-Plumbing | 65085 | 9409749 | 79077 |
| SVC-Policy Consulting | 65076 | 9409740 | 79068 |
| SVC-Risk Management Consulting | 65111 | 9409792 | 79103 |
| SVC-Security | 65104 | 9409783 | 79096 |
| SVC-Shredding | 65107 | 9409786 | 79099 |
| SVC-Snow Removal | 65087 | 9409751 | 79079 |
| SVC-Software Developer | 65102 | 9409779 | 79094 |
| SVC-Software Maintenance | 65100 | 9409772 | 79092 |
| SVC-Software Upgrade | 65101 | 9409777 | 79093 |
| SVC-Translation | 65110 | 9409791 | 79102 |
| SVC-Waste Management | 65093 | 9409760 | 79085 |
| SVC-Waste Management Hazardous | 65094 | 9409763 | 79086 |

## Appendix B: Miscellaneous HIS items

| Item Description | Description |
|---|---|
| MISC BED PARTS | Ordering of parts required to repair or maintain beds (segregated from Bio-Medical Engineering to facilitate reporting and for those hospitals where beds may not fall under Bio-Medical Engineering) |
| MISC BIOMEDICAL ENGINEERING | Ordering of parts required to repair equipment that is under Bio-Medical Engineering control; is not to include parts for beds. Items that will be purchased on a continuing basis (e.g. batteries) are to be created with a unique HIS items #. |
| MISC CONSIGNMENT | Ordering of items to be held on Consignment at zero value. If items are to be purchased at a dollar amount the Purchase PO is to be created with a HIS item number. |
| MISC DELIVERY FEE | To be used when the value of the delivery fee is substantial enough to justify needing its own line on the Purchase Order (typically over $100) |
| MISC ELECTRICAL SUPPLIES | For purchases of low value electrical supplies (e.g. light bulbs, ballasts, connectors etc). For one time electrical service/outsourced repairs please see MISC ONE TIME SERVICE |
| MISC ITEM | For **one time** purchases of low value **non-clinical** items. Any clinical item being purchased has the possibility of being subject to recall or safety alert and is to have a unique HIS item # to enable tracking. This is not to be used for Capital expenditures or for hazardous/chemical items that require MSDS or Occupational Health awareness of their use. |
| MISC EQUIPMENT ON LOAN | For documentation of equipment that is being loaned to the hospital but not purchased by the hospital. Loan agreement may be free of charge or for a fee; this does not include Leased equipment. |
| MISC PLUMBING SUPPLIES | For purchases of low value plumbing supplies (e.g. Fittings, Couplings, elbows etc.) For one time plumbing service/outsourced repairs please see MISC ONE TIME SERVICE |
| MISC RENAL | For **one time** purchases of **non-clinical** items that are specifically for RENAL; any clinical item being purchased that may be subject to recall or safety alert is to have a unique HIS item # to enable tracking. |
| MISC ONE TIME SERVICE | For **one time** service or repair purchases; Can also be utilized for Supply & Install situations, as the installation is considered a service. Not for on-going Service Contracts which are to be procured under one of the special Service contract items (see Section 5.6 iv and Appendix C) |

**Appendix C. SSW Naming Convention Guidelines**

The below outlines the naming convention guidelines that should be followed for item related requests.

| **Item Field** | **Explanation** | **Example** | **Required Field? (Y/N)** |
|---|---|---|---|
| **Item Description** | • **[NOUN]** followed by **[ADJECTIVES]** and then **[ADDITIONAL DESCRIPTIVE WORDS]**<br>• Abbreviations should be avoided but if required to keep within the 30 character limit, the GS1 standards must be followed<br>• When required, abbreviation priority order should start from the right to the left of the description. Avoid using abbreviations for the [noun] portion of the description<br>• Product Brand Name can be included in item description line 2 if the end user request. | e.g. GLOVE SURGICAL SIZE 7 LATEX.<br>See below Figure 1 for more details regarding item description requirements. | Y |

Figure 1: Item Description

| (noun) | (adjective/product descriptor) | (size with UOM, side) | (colour, disposable / reusable, sterile / non-sterile, latex content) |
|---|---|---|---|

| **Item Field** | **Explanation** | **Example** | **Required Field? (Y/N)** |
|---|---|---|---|
| **Common Name** | • Will contain the manufacturer catalog number.<br>• DM will retrieve this information from the completed manufacturer catalog number field in the CARDS request.<br>• If the Manufacturer Catalog number is not available, the vendor catalog number will be used. | e.g. BD305109 | Y - DM will input this field.<br>Not mandatory when completing the CARDS request |

| Item Field | Explanation | Example | Required Field? (Y/N) |
|---|---|---|---|
| **Packaging String** | • The packaging string should be formatted from largest to smallest unit of measure.<br>• Packaging string abbreviations must follow the GS1 Standard Code of Measures. The GS1 standard list can be found in Appendix D | e.g. CA/1 BX/5 EA | Y |
| **Unit of Purchase (UOP)** | • Unit of Purchase must be included in the packaging string.<br>• The vendor should provide the UOP when item pricing is quoted. GS1 Standard Code of Measures must be followed (see Appendix D for list) | e.g. CA = Case | Y |
| **Price** | • Price to 4 decimals as per the unit of purchase | e.g. $100.0000 | Y |
| **Manufacturer Name** | • Mnemonic is seen in this field.<br>• Within the Manufacturer Dictionary the full legal manufacturer name is to be used.<br>• Will be added to the Manufacturer Dictionary if it does not already exist. | e.g. Becton Dickinson Canada instead of BD Canada | Y |
| **Manufacturer Catalog Number** | • Manufacturer unique item descriptor, as provided by Manufacturer/Vendor or as is on packaging | e.g. 305109 | Y |
| **Vendor Name** | • Must be the full legal name of Company that sells product<br>• Will be added to the Vendor Dictionary if it does not already exist. | e.g. Johnson and Johnson Medical Products Incorporated | Y |
| **Vendor Catalog Number** | • Vendor's unique item descriptor<br>• Will be provided by vendor to ensure the unique descriptor matches the invoice | e.g. BD305109 | Y |
| **Expense Objects Code (EOC)** | • Code for categorizing expenses which will be provided by the hospital finance department | e.g. 4606000 - General Med Supplies | Y |

| Item Field | Explanation | Example | Required Field? (Y/N) |
|---|---|---|---|
| **Category** | • United Nations Standard Products and Services Code (UNSPSC) and should be as specific as possible | e.g. 42132200 is the UNSPSC for Medical Gloves and Accessories | Y - if unsure, DM will complete using item information provided in the request |
| **Contract** | • SSW Initiative number which typically be will be provided by SSW Sourcing Department | e.g. 159133 | Y - if submitting a Contract Pricing Schedule for product/service |
| **Contract Expiry** | • First expiry date of the contract, does not include option years until executed. | e.g. December 31, 2019 | Y - if submitting a Contract Pricing Schedule for product/service |