



**Public – To be published on the Trust external website**

# IT Chargeable Software Re-assignment Procedure

**Ref: IT-0020-004-v1**

**Status: Approved**

**Document type: Procedure**

**Overarching Policy: [IT & Telephony Procurement Re-assignment and Disposal Policy](#)**

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## 1 Introduction

This procedure supports the IT & Telephony Procurement, Re-assignment and Disposal Policy with regards to chargeable software.



Please note there are separate procedures for Laptops and for Smartphones.

Please use the below links to view them:

- [IT Laptop Re-Assignment and Disposal Procedure](#)
- [IT Smartphone Re-Assignment and Disposal Procedure](#)

This procedure covers the re-assignment of chargeable software within the Trust, and describes:

- The re-assignment process for chargeable software and explains what is required at each step.
- The recording of items re-assigned, their location and who is responsible for this.
- The retention of chargeable software for staff moving teams along with appropriate budget placement.

## 2 Purpose

To ensure the security and integrity of the Trust's IT infrastructure in a safe, secure and economical way.

Specifically following this procedure will help the Trust to:

- Ensure staff have the necessary IT tools to carry out their roles.

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- Ensure that IT & Telephony equipment used for Trust purposes must be officially purchased and tested for compatibility
  - Support individual staff with any workplace adjustments that might be needed.
  - Provide a mechanism for staff to discuss their requirements,
    - Improve the management and use of chargeable software assets

### 3 Who this procedure applies to

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This procedure is relevant to, but not limited to, the following groups who use or have access to Trust IT & Telephony equipment. These groups were initially consulted when the procedure was developed.

- Staff
- Service Users
- Students
- Volunteers
- Budget Holders
- Line Managers
- Finance Services
- Information Services / Service Desk / Desktop Team
- Information Asset Owners / Information Asset Administrators
- External Suppliers

### 4 Related documents

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This procedure describes what you need to do to implement 4.1.2 and 4.1.3 section of the IT & Telephony Procurement, Re-assignment and Disposal Policy.



The [IT & Telephony Procurement, Re-assignment and Disposal Policy](#) defines how Trust IT equipment **and chargeable software** is to be re-assigned and disposed, which you must read, understand and be trained in before carrying out the procedures described in this document.

- [IT Telephony Procurement, Re-assignment and Disposal Policy](#)
- [IT Laptop Re-Assignment and Disposal Procedure](#)
- [IT Smartphone Re-Assignment and Disposal Procedure](#)

## 5 Step-by-step instructions for reassignment of chargeable software

Step	Who	Task
1	CAM Team	Reviews monthly movers/leavers report and identifies any staff member with chargeable software allocated to them.
2	CAM Team	Identifies if the software is user or role specific and if it was externally funded (eg via Access to Work) or purchased by the Trust.
3	CAM Team	Contacts the manager in advance of the move/leave date to advise of options (see below): <ul style="list-style-type: none"> <li>• Mover/leaver has user specific software which was externally funded – go to step 4</li> <li>• Mover/leaver has user specific software which was purchased by the Trust – go to step 5</li> </ul> Mover/leaver has role specific software purchased by the Trust – go to step 6
4	Budget Holder / Line Manager	All user specific software should move with the staff member between roles and if it was externally funded they are permitted to take it with them if and when they leave the Trust.
5	Budget Holder / Line Manager	User specific software purchased by the Trust should move with the staff member between roles but should be re-assigned if the staff member leaves the Trust (go to step 7)
6	Budget Holder / Line Manager	Role specific software (e.g Adobe) should move with the staff member if they will require it in their new role. If they no longer require the software, go to step 7

7	Budget Holder / Line Manager	Identify whether the software can be re-assigned within the team or section. If the software can be re-assigned locally go to step 8. If the software cannot be re-assigned locally then go to step 10
8	Budget Holder / Line Manager	A software install call should be logged via the service desk portal and the transfer option should be selected. The specific details (type of software and asset numbers of kit) should be completed, and the request submitted
9	Tech – EUC Team	Receive software install request and complete transfer as requested and close call.
10	Budget Holder / Line Manager	Notify the Asset Management Team that the software is no longer required.
11	CAM Team	Update the asset management records to reflect that a spare license is available
12	CAM Team	Allocate the software to the next request received for that software



Staff moving team (who will require the use of chargeable software) **MUST** take their existing software with them to their new role.

## 6 Definitions

Term	Definition
Information Asset Administrator (IAA)	<ul style="list-style-type: none"> <li>IAAs ensure that policies and procedures are followed, recognise actual or potential security incidents, consult their IAO on incident management, and ensure that information asset registers are accurate and up to date.</li> </ul>
IT & Telephony Equipment	<ul style="list-style-type: none"> <li>This includes hardware and software used by the Trust to conduct its business, including Smartphones</li> </ul>
End of Life Devices (EOL)	<ul style="list-style-type: none"> <li>This refers to IT equipment that is no longer cyber secure and does not hold the technology to continue with security updates.</li> </ul>

MFA	<ul style="list-style-type: none"> <li>Multi-factor authentication (MFA) is an additional way of checking that it is really you when you log in to your account. It helps to ensure cybersecurity and help protect against loss from or damage to Trust infrastructure.</li> </ul>
CAM Team	<ul style="list-style-type: none"> <li>Centralised Asset Management Team (also referred to as the Asset Management Team)</li> </ul>
User specific software	<ul style="list-style-type: none"> <li>User specific software is assistive software required by a staff member to support them in the workplace</li> </ul>
Role specific software	<ul style="list-style-type: none"> <li>Role specific software is software that is required to carry out a specific function</li> </ul>

## 7 How this procedure will be implemented

- This procedure will be published on the Trust’s intranet and external website.
- Line managers will disseminate this procedure to all Trust employees through a line management briefing.

### 7.1 Implementation action plan

Activity	Expected outcome	Timescale	Responsibility	Means of verification/ measurement
Identifying staff movers and leavers and liaising with the relevant managers to ensure any chargeable software are dealt with correctly	Improved utilisation and management of chargeable software and additional support for managers and staff members through the process	Monthly	IT Contracts and Asset Lead	Workforce Report sent to Asset Team Manager.

## 7.2 Training needs analysis

Staff/Professional Group	Type of Training	Duration	Frequency of Training
All	Read Procedure	20 minutes	Annually or when changes are applied.

## 8 How the implementation of this procedure will be monitored

Number	Auditable Standard/Key Performance Indicators	Frequency/Method/Person Responsible	Where results and any Associate Action Plan will be reported to, implemented and monitored; (this will usually be via the relevant Governance Group).
1	100% Reconciliation of both Internal Movers and leavers reports against list of chargeable software reallocated	Frequency = Monthly Method = manual reconciliation Responsible = Centralised Asset Management Team	Digital and Data Management Meeting (DDMM)

## 9 References

- ITAM (IT Asset Management) Best Practice
- ITIL (Information Technology Infrastructure Library) guidance
- National Cyber Security Group
- [NHS England Data Security and Protection toolkit](#)



## 10 Document control (external)

To be recorded on the policy register by Policy Coordinator

Required information type	Information
Date of approval	11 October 2024
Next review date	11 October 2027
This document replaces	n/a – new document
This document was approved by	D&D Architecture Board
This document was approved	03 October 2024
This document was ratified by	Digital Performance and Assurance Group (DPAG)
This document was ratified	11 October 2024
An equality analysis was completed on this policy on	29 May 2024
Document type	Public
FOI Clause (Private documents only)	n/a

### Change record

Version	Date	Amendment details	Status
1	11 Oct 2024	New procedure covering chargeable software	Approved

## Appendix 1 - Equality Impact Assessment Screening Form

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Please note: The [Equality Impact Assessment Policy](#) and [Equality Impact Assessment Guidance](#) can be found on the policy pages of the intranet

<b>Section 1</b>	<b>Scope</b>
<b>Name of service area/directorate/department</b>	Digital & Data Department
<b>Title</b>	IT Chargeable Software Re-assignment Procedure
<b>Type</b>	Procedure/guidance
<b>Geographical area covered</b>	Trust Wide
<b>Aims and objectives</b>	This procedure has been created to ensure that staff have details on the procedure to re-assign and securely dispose of IT assets
<b>Start date of Equality Analysis Screening</b>	22 Apr 2024
<b>End date of Equality Analysis Screening</b>	29 May 2024

Section 2	Impacts
<p><b>Who does the Policy, Procedure, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan benefit?</b></p>	<p>This procedure has been created to ensure that staff have easy access to clear information regarding the Trust's process for re-allocation of chargeable software</p> <p>In addition this revision supports staff retaining assistive software when they move teams, which supports staff with any reasonable adjustments in place and enables staff to efficiently and effectively carry out their role.</p>
<p><b>Will the Policy, Procedure, Service, Function, Strategy, Code of practice, Guidance, Project or Business plan impact negatively on any of the protected characteristic groups? Are there any Human Rights implications?</b></p>	<ul style="list-style-type: none"> <li>• <b>Race</b> (including Gypsy and Traveller) <b>NO</b></li> <li>• <b>Disability</b> (includes physical, learning, mental health, sensory and medical disabilities) <b>NO</b></li> <li>• <b>Sex</b> (Men and women) <b>NO</b></li> <li>• <b>Gender reassignment</b> (Transgender and gender identity) <b>NO</b></li> <li>• <b>Sexual Orientation</b> (Lesbian, Gay, Bisexual, Heterosexual, Pansexual and Asexual etc.) <b>NO</b></li> <li>• <b>Age</b> (includes, young people, older people – people of all ages) <b>NO</b></li> <li>• <b>Religion or Belief</b> (includes faith groups, atheism and philosophical beliefs) <b>NO</b></li> <li>• <b>Pregnancy and Maternity</b> (includes pregnancy, women / people who are breastfeeding, women / people accessing perinatal services, women / people on maternity leave) <b>NO</b></li> <li>• <b>Marriage and Civil Partnership</b> (includes opposite and same sex couples who are married or civil partners) <b>NO</b></li> <li>• <b>Armed Forces</b> (includes serving armed forces personnel, reservists, veterans and their families) <b>NO</b></li> <li>• <b>Human Rights Implications</b> <b>NO</b> (<a href="#">Human Rights - easy read</a>)</li> </ul>
<p><b>Describe any negative impacts / Human Rights Implications</b></p>	<p>None</p>

<b>Describe any positive impacts / Human Rights Implications</b>	<p>Staff will understand how they can re-assign chargeable software in the correct manner and where to seek guidance, by following the Procedure the Trust will use only approved equipment and ensure equipment is disposed of in a secure manner, this in turn supports the Data Security and Protection toolkit and Cyber Security.</p> <p>The procedure should help improve the utilisation and management of Trust assets. Overall, this should result in a positive impact on the Trust financial budgets.</p>
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<b>Section 3</b>	<b>Research and involvement</b>
<b>What sources of information have you considered? (e.g. legislation, codes of practice, best practice, nice guidelines, CQC reports or feedback etc.)</b>	See references section
<b>Have you engaged or consulted with service users, carers, staff and other stakeholders including people from the protected groups?</b>	Yes
<b>If you answered Yes above, describe the engagement and involvement that has taken place</b>	Engaged with Centralised Asset Project Steering Group. Requested all Trust staff to offer feedback on consultation.
<b>If you answered No above, describe future plans that you may have to engage and involve people from different groups</b>	

<b>Section 4</b>	<b>Training needs</b>
<b>As part of this equality impact assessment have any training needs/service needs been identified?</b>	No
<b>Describe any training needs for Trust staff</b>	No
<b>Describe any training needs for patients</b>	No
<b>Describe any training needs for contractors or other outside agencies</b>	No

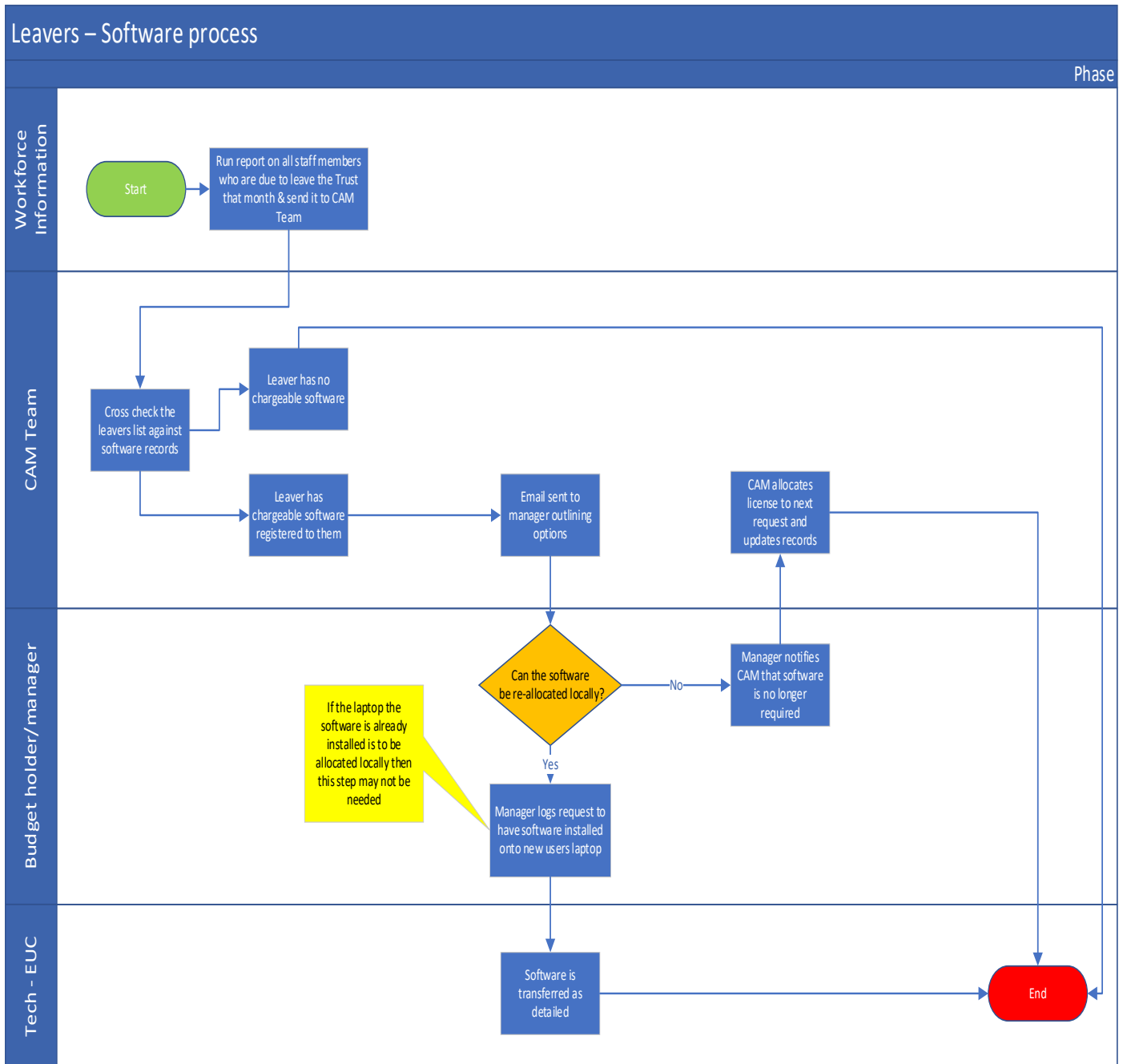
**Check the information you have provided and ensure additional evidence can be provided if asked.**

## Appendix 2 – Approval checklist

Title of document being reviewed:	Yes / No / Not applicable	Comments
<b>1. Title</b>		
Is the title clear and unambiguous?	Yes	
Is it clear whether the document is a guideline, policy, protocol or standard?	Yes	
<b>2. Rationale</b>		
Are reasons for development of the document stated?	Yes	
<b>3. Development Process</b>		
Are people involved in the development identified?	Yes	
Has relevant expertise has been sought/used?	Yes	
Is there evidence of consultation with stakeholders and users?	Yes	
Have any related documents or documents that are impacted by this change been identified and updated?	Yes	
<b>4. Content</b>		
Is the objective of the document clear?	Yes	
Is the target population clear and unambiguous?	Yes	
Are the intended outcomes described?	Yes	
Are the statements clear and unambiguous?	Yes	
<b>5. Evidence Base</b>		
Is the type of evidence to support the document identified explicitly?	Yes	
Are key references cited?	Yes	
Are supporting documents referenced?	Yes	

<b>6. Training</b>		
Have training needs been considered?	Yes	
Are training needs included in the document?	Yes	
<b>7. Implementation and monitoring</b>		
Does the document identify how it will be implemented and monitored?	Yes	
<b>8. Equality analysis</b>		
Has an equality analysis been completed for the document?	Yes	
Have Equality and Diversity reviewed and approved the equality analysis?	Yes	
<b>9. Approval</b>		
Does the document identify which committee/group will approve it?	yes	D&D Architecture Group and DPAG
<b>10. Publication</b>		
Has the policy been reviewed for harm?	Yes	No harm
Does the document identify whether it is private or public?	Public	
If private, does the document identify which clause of the Freedom of Information Act 2000 applies?	n/a	
<b>11. Accessibility</b> ( <a href="#">See intranet accessibility page for more information</a> )		
Have you run the Microsoft Word Accessibility Checker? (Under the review tab, 'check accessibility'. You must remove all errors)	Yes	
Do all pictures and tables have meaningful alternative text?	Yes	
Do all hyperlinks have a meaningful description? (do not use something generic like 'click here')	Yes	

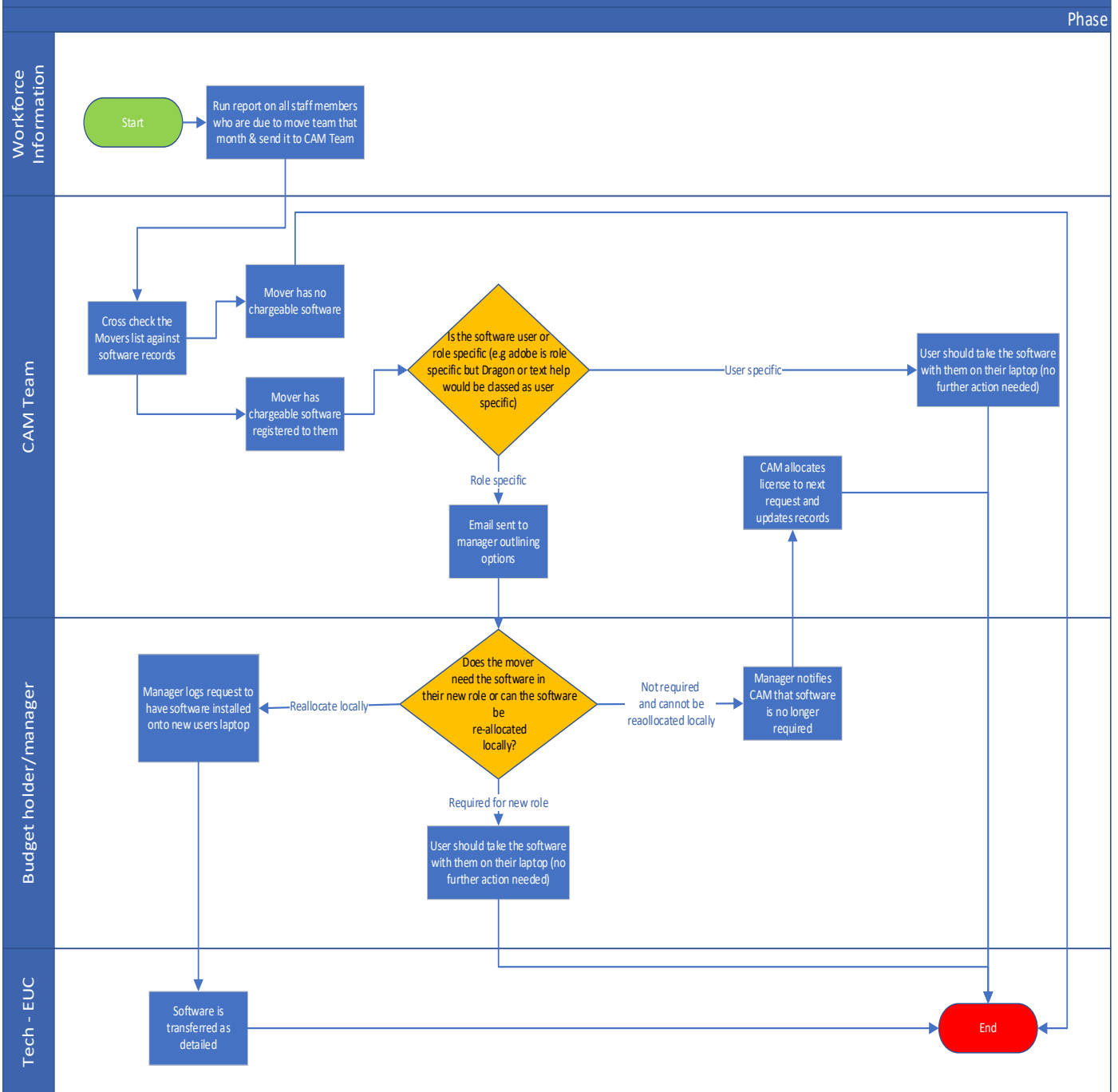
## Appendix 3 – High level flow charts



A more accessible text version is available on request.



Movers/change of role – Software process



A more accessible text version is available on request.