MONTEFIORE
POLICY AND
PROCEDURE

SUBJECT: PRINT MANAGEMENT POLICY

OWNER: Procurement & Information Technology

EFFECTIVE: 11/1/2021   REVIEW/REVISED: SUPERSEDES:

Purpose:

The purpose of this policy is to manage better and substantially lower operating costs for printing and copying documents and the associated procurement of printing devices. For the purpose of this policy, printing devices relate to the office printing on any printing device, including desktop printers, multifunction devices (MFDs), single-function printers (SFPs), and imaging devices (e.g., facsimiles and photocopiers). Specialty printing devices are not included in this policy (e.g., wide format printers, Intermec barcode/label printers, card scanners, and 3D printers).

This policy is intended to:
- Eliminate the use of personal and non-networked printers in order to reduce costs and provide additional capabilities through the use of networked printers and MFD's throughout Montefiore.
- Reduce print output expenses by moving print to networked printers and/or MFDs.
- Improve the quality of service while reducing the maintenance expenses of Montefiore's print/copy/scan devices.
- Lessen the environmental impact by reducing paper usage, energy consumption, and landfill waste associated with toner and ink cartridges and unmanaged printing practices.
- Ensure confidentiality of print data, diminish workflow disruptions due to out-of-service printers, and minimize print waste by implementing PaperCut technology on all MFDs that allow users to release a print job from any Montefiore networked printer securely.

Purchases of personal printers have been growing at an alarming rate for the past several years. Although these personal printers are often very inexpensive, the continuing cost of consumables for these devices is significant and escalating.

TJS rev.20211012

Given these escalating costs and the presence of effective and efficient alternatives, Montefiore has decided to enforce this policy.

This policy sets forth guidelines for the Managed Print Services (MPS) program and will be enforced by Information Technology and Procurement. Montefiore Medicine has adopted an MPS program to provide effective, quality print, copy, fax, and scan services to meet Montefiore's needs that maximizes use and reduces ongoing maintenance and replacement costs.

Responsibility:

This policy is implemented under the ownership and authority of Procurement Services and Information Technology and must be reviewed annually for improvements. The following roles and responsibilities are accountable for performing their tasks according to standards meeting this policy's requirements.

Role	Responsibility
All Montefiore Medicine personnel	Adherence and enforcement of the policy
Information Technology	Basic Support, Network Connectivity, Liaison between end-user and Vendor
Procurement Services	Monitor & Encourage Compliance Usage & Cost Monitoring, Vendor Liaison, Contract Management
Vendor	Optimization planning, execution, and maintenance of fleet

Definitions:

Managed Print Services (MPS)
The process and personnel required to provide managerial support of the MPS solution for all output print devices at Montefiore, including support services, recommendations, system reporting, billing, issue resolution, day-to-day management, cost analysis, and oversight.

Multifunction Device (MFD)
Includes any network-capable document production device that provides multiple capabilities, including but not limited to printing, copying, faxing, and scanning.

Single-Function Printer (SFP)
Includes any local or network-capable document production device that provides print output only. Networked single-function printers are supported via the MPS program, which includes service, supply, and parts.

Local Printer

TJS rev.20211012

Local Printers, also considered personal devices, are typically connected to a computer. Local printers require the purchase of individualized toners or ink cartridges, and as such, will not be included in the program unless a well-documented exception is approved. Ordering of accessory supplies for local printers will incur additional costs for supply, parts, and associated labor.

Non-Consumables
Staples, paper, and other media items are not included under the MPS program and should be ordered separately through established processes.

Printer Supplies
Toners, inks, fuser, maintenance kits, and ALL service parts are included under the MPS program (Not included are damaged parts outside of normal wear and tear).

PaperCut Technology
A software system that will be integrated with every MFD within the Montefiore facilities that allows users to roam and print securely on any Montefiore networked device, independent of geographic location, with the scan of the user's Montefiore ID badge. The software can track and report accurate cost and activity on a per user, device, or department basis. Any unreleased jobs will be deleted after 24 hours for confidentiality and safety purposes. This software aims to minimize print waste, reduce printing costs, protect document confidentiality, and increase convenience. PaperCut will not be installed on personal printers or single-function print devices.

MPS Exceptions
This policy does not cover specialty printing, 3D Printers, wide format printers, card scanners, and Intermec Barcode/Label Printers.

Policy:
1. **Section A: General**
   a. Employees are encouraged to use electronic communications in lieu of paper to the extent possible.
   b. All purchases/leases of copying equipment and copying devices require the prior explicit approval of Procurement and Information Technology. (See the section titled: Procurement).
   c. A valid request for exceptions to this policy must be approved by the requester's COO Council Member or their designee, and shall be reviewed by Information Technology. The final approval must be from Information Technology's CIO appointee, before the request for exceptions is final (**See the section titled Exceptions**).
   d. Information Technology, Procurement, and the Vendor will standardize devices (makes/models) to minimize the number of types of equipment maintained on-site while controlling for cost and security requirements.
   e. The multifunction copiers will be equipped with a secure print system. All employees must use their I.D. badges or logins to release the prints.
   f. Color output capabilities will be provided based on business needs and current monthly color volume.

g. **No new ink-based printer purchases will be made after 10/01/21 unless approved by the CIO appointee in Information Technology.** Starting October 1st, 2021, Montefiore will begin strategically removing ink-based devices by floor and building. All users will be instructed to use a Networked Copier. All prints will be securely held in a virtual cloud and can be accessed through any Montefiore networked device (See the section titled: Procurement).

h. **Minimize the use of fax devices:** No new facsimile purchases will be made after October 1st, 2021. Scan-to-email functions should be used in place of faxing when possible. Faxing incurs additional costs for phone lines and paper, and scanning a document is free. Therefore, it is advised that all employees use scanning and emailing as the default modality.

2. **Section B: Office Environment**
   a. Copiers will be networked and shared by each location unless there is an approved exception (see the section titled: Exceptions). These devices will be customized to the needs of each location and will be fully maintained and supported by the contracted Vendor.
   b. Suppose an internet jack is not available at the specified location. In that case, the Department will incur an additional one-time set-up cost for necessary cabling through Montefiore's Service Desk for local personal printers. However, all fees associated with the installation of MFD and networked copiers and printers will be absorbed by Information Technology.
   c. To reduce costs and incorporate sustainable practices in its procurement and use of printing devices, Montefiore will endeavor to increase the employee-to-printer ratio (e.g., 10 to 1) by eliminating the use of individual printers and centralizing printing stations among work areas.
   d. Montefiore will follow Industry Standards for Copier Placement:
      i. An MFD Copier can service up to 25 users.
      ii. MFD Copiers should not be more than 30 to 60 feet from any user (depending on the environments' accessibility).

3. **Section C: Device Settings**
   a. All MFDs will be equipped with Papercut and will be accessible using a Montefiore ID badge. Users are no longer hindered by out of commissioned devices. All printing will be processed via a virtual print queue, allowing the print job to be released from the closest available networked MFD.
   b. All devices will be set to use the best available Power Savings Option to reduce energy consumption wherever the equipment capability exists.
   c. The default setting for all print devices will be Double-Sided (Duplex) wherever the equipment capability exists to reduce paper consumption.
   d. Monochrome (B/W) printing will be the default setting on all color print devices wherever the equipment capability exists to reduce costs associated with color printing.

Procurement:
Multifunctional Devices (MFDs)
Montefiore has an exclusive contract to provide MFDs.

TJS rev.20211012

1. **MFDs**
   The Vendor will assist in selecting the appropriate device based on the Department's needs. Each Copier P.O. will be reviewed and approved by Procurement. Procurement is required to sign off on all purchases of new machines before the Vendor is authorized to proceed. Information Technology is required to sign off on all machine moves, exchanges, and discarding before the Vendor is authorized to proceed.
   a. For exchanges, the device(s) will be replaced by an equal to or better, properly spec'd printer(s) that is(are) more contemporary (less than five years old) and is in the Information Technology or Vendor inventory. The inventory consists of any equipment deemed to be excess, removed from production, and stored in either an Information Technology or Vendor facility.
2. **Printers**
   No individual non-enterprise printers will be allowed on the Montefiore Campuses unless an approved exception is made. Only Information Technology approved printer models are authorized to be used at Montefiore.
3. **Supplies**
   a. If a vendor approaches you to sell you toner, you should call Purchasing to report this unauthorized solicitation.
   b. Toners will be replaced automatically by the contracted Vendor for all MFDs and networked devices.
   c. For non-networked and personal devices, toners and ink cartridges are purchased by the end-user and will be billed additionally for any service charges incurred by the respective Department. The end-user will place the order, but a dedicated vendor technician will install it and properly dispose of the used cartridges.
   d. Nyack Hospital employees will be responsible for ordering and installing the toners. New cartridges will provide a return label for the replaced cartridge to be returned.
   e. For unconnected units and units at Nyack, Montefiore Medicine employees have two options for ordering:
      (1) My TGI Website (https://www.mytgiportal.com)
      (2) TGI supply hotline at 718-237-0060

Maintenance & Repairs:

1. All maintenance and repair services are covered under the Montefiore MPS Program
   a. All service requests should be placed with the Montefiore Service Desk. Departments must provide a brief description of the issue.
   b. Maintenance, repair costs, costs for parts, including fuser, maintenance kits, or on-site service, are included for all Vendor provided MFDs (networked and non-networked) and networked single-function printers. Nyack and any non-networked units are not included and will incur additional costs.
   c. All services will be performed by the Vendor's dedicated on-site support engineers at Montefiore facilities (excluding Nyack). Service outside the coverage times and locations may incur additional charges.
   d. Repairs on laser printers, either connected or not connected to the Network, will be conducted and managed by the contracted Vendor in coordination with

TJS rev.20211012

Information Technology. Personal or unconnected single-function printers will incur additional costs for supplies, parts, and labor.

Exceptions:

While this policy aims to reduce cost, redundancy and improve device utilization, there are instances and exceptions where local/desktop printing is needed. Departments that can justify exceptions must obtain formal approval from the requester's COO Council Member or their designee. Ultimately, Information Technology will confirm whether the local print or desktop device is warranted based on the following exceptions:

1. **Monthly Volume Threshold**
   To justify the fixed lease cost of most workgroup-class MFDs (e.g. Network Copier or Network Printer), each device must achieve a particular volume threshold of monthly output. If there is not enough monthly volume to justify a workgroup MFD, the end-user (or group of end-users) will be provided with the most cost-efficient device determined by the Vendor. As a rule of thumb, the workgroup's monthly volume should exceed 1,000 pages to justify a workgroup-class MFD.
2. **Convenience**
   Convenience exceptions are based on the following criteria:
   a. The nearest MFD or networked LaserJet is more than 60 feet away from the employee's workstation or office, the office area layout has constraints that require an added device, or there is no MFD in that campus building or floor.
   b. The employee has special printing needs on a consistent and regular basis, which are defined as part of the employee's job function and description, including special paper or letterhead requirements.
   c. Requiring the employee to walk to the MFD would constitute a substantial hardship (e.g., medical disability or handicap).
   d. The space requirement and functionality of the location require a desktop MFD.

Exceptions Process:

If a request for exceptions is needed, please follow the following steps to obtain approval:

1. Fill out Printer Exceptions Form and obtain approval from a COO Council Member or their designee.
2. Submit request for an additional printer through the Self-Help Portal and attach the approval form along with your department's cost center information.
3. The contracted Vendor will arrive onsite to confirm your exceptions request.
4. If the exception is valid, the Vendor will forward the exceptions requests to the CIO of Information Technology for final approval.
5. Once approved by all three parties, Deployment Services will charge the cost center and deliver the new equipment.

TJS rev.20211012