

NIH Policy and Procedures for Acquiring and Managing Personal Digital Assistants (PDA)

PURPOSE:

The purpose of this document is to implement official policy and procedures for acquiring and managing Personal Digital Assistants (PDA) at NIH. It applies to all NIH personnel, contractors, and visitors who have been issued or will be issued PDAs procured with NIH funds.

BACKGROUND:

PDAs are palm-sized computing devices that provide users with constant access to locally stored information and may also provide wireless connection to e-mail, Internet, and/or voice communications. NIH uses PDA devices to provide access to NIH systems for senior staff, middle and line managers, and other staff whom management requires to be on-call for operations support, or emergency response. However, as with other information technology resources, NIH needs to ensure that PDAs procured for use by staff are justified, technically effective, and managed appropriately.

POLICY AND PROCEDURES:

- This policy applies to the use of all NIH PDAs for all uses (e.g., office, home, field locations, telecommuting sites).
- The recommended PDA for use at NIH is the RIM Blackberry—which is the HHS standard--for all handheld devices needed for e-mail or for voice and e-mail communications. (Cell phones may still be ordered and used by staff where only voice communications are needed; they should be used in accordance with the NIH cell phone policy at <http://www1.od.nih.gov/oma/manualchapters/acquisitions/26101-26-6/>).

Justification for acquisition and use of PDAs:

ICs shall ensure that procurement of a PDA device supports the employee's responsibilities and related productivity and responsiveness requirements. Below are examples where a PDA could be of great benefit to an organization:

- providing a valuable back-up communication resource to use in the event of network disruptions that could negatively impact operations.
- enabling access to vital and frequently automated information when there is no other immediate means to do so.
- providing off-hour monitoring/support of projects that require attention without requiring on-call staff members to be near a computer.
- significantly increasing the responsiveness of and accessibility to staff members and managers.

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- providing access to staff who are routinely out of the office because of the nature of their position, e.g., attending meetings, providing technical assistance, telecommuting, or traveling.
- enabling extended communications for a wide range of staff to engage in mission-related activities beyond the standard workday/workplace.
- providing remote accessibility at a much lower cost compared to other methods.
- providing Continuity of Operations Plan (COOP) staff with continuous and effective communication.
- providing e-mail and voice communications to staff who do not regularly have access to, or do not have dedicated access to, a computer, e.g., lab staff.

Enforcement of PDA Policy and Procedures:

- IC Executive Officers (EOs) will be responsible for the local enforcement of this policy.
- The Office of the Deputy CIO, in coordination with the NIH Information Technology Management Committee (ITMC), will update this policy to reflect changes in technology, approval or procurement processes, or other changes that are needed.

Required Approvals:

- The IC EO must approve the acquisition of all new or replacement PDAs and related service contracts for staff in their respective IC.
- The IC EO and NIH Chief Information Officer (CIO) must approve all exceptions to procuring the HHS-standard PDA device. Exception requests must include documentation that supports the reason that a Blackberry device cannot meet the staff's needs.

Acquisition Procedures:

- ICs that order a PDA or replace an existing PDA must comply with the policy and approval requirements presented above.
- ICs shall refer to information provided on the CIT website at <http://isdnp.nih.gov/hardware/blackberry.asp> when procuring Blackberry devices.
- ICs shall follow their normal procurement ordering processes after receiving approval(s).

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Management of Multiple Communication Devices and Services:

- ICs whose staff currently rely on multiple portable devices to obtain both e-mail and voice communication, e.g., cell phones, pagers, and other (non-Blackberry) PDAs, should initiate actions to transition to Blackberry devices when feasible. Unneeded communication services, including duplicative services, shall be promptly terminated.
- ICs shall carefully review and promptly execute payment for monthly charges.

Inventory and Property Management:

- CIT will monitor a central inventory of Blackberry models that have been activated through the use of the centralized Blackberry Enterprise Server (BES).
- ICs will assure that Receiving Officials notify their Property Custodial Officers of the manufacturer, model number, serial number, and assigned user for each PDA received.
- ICs will assure that their Property Disposal Officers create a property record for all PDAs in the Property Management Information System (or its successor).
- ICs shall review and maintain all documentation relating to PDA purchases, replacements, maintenance, service cancellations, and payment of monthly service fees.
- IC staff should display information on the opening PDA screen stating that the equipment is Federal property and list the assigned user and IC Property Custodial Officer contact information, so that the PDA can be properly returned if found.
- IC management shall ensure that PDA equipment is managed in accordance with the following NIH Property Regulations:
 - **Inventory and Accountability of NIH Property (including IT resources):** NIH Manual 26101-25-2 - PERSONAL PROPERTY MANAGEMENT GUIDE - <http://www1.od.nih.gov/oma/manualchapters/acquisitions/26101-25-2>
 - **Loss, Damage, or Thefts of NIH Property:** NIH Manual 26101-25-2-16 PERSONAL PROPERTY MANAGEMENT GUIDE - Resolution of Loss, Damage and/or Destruction of Government Property - <http://www1.od.nih.gov/oma/manualchapters/acquisitions/26101-25-2-16/>
- IC management will assure that employees make PDA equipment available to inventory technicians, when required, for the conduct of property inventories.

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Appropriate Use: IC management shall ensure that individuals who use NIH-owned PDAs use them appropriately and for authorized use only in accordance with NIH Manual 2806 - Limited Authorized Personal Use of NIH Information Technology (IT) Resources - <http://www1.od.nih.gov/oma/manualchapters/management/2806/>.

Security: IC management and staff shall ensure that NIH-owned PDAs are effectively safeguarded in accordance with the following:

- Guidance for Securing Data on Portable Systems - <http://irm.cit.nih.gov/security/GuixSecuData.html>
- NIH Information Technology General Rules of Behavior - <http://irm.cit.nih.gov/security/nihitrob.html>
- NIH Password Policy - <http://irm.cit.nih.gov/policy/passwords.html>
- NIH Wireless Technology Policy - <http://irm.cit.nih.gov/nihsecurity/wirelessP.doc>
- INTERFACE On-Line - Safe in the Palm (Pilot) of Your Hand - Advice on Securing Portable Systems - <http://datacenter.cit.nih.gov/interface/interface222/pda.html>

For additional information on securing PDAs, contact your IC Information Systems Security Officer (ISSO). A list of ISSOs is located at <http://irm.cit.nih.gov/nihsecurity/scroster.html>.

Privacy and Sensitive Information:

IC staff shall refrain from sending or storing sensitive data on the PDA (e.g., patient data, financial data). Sensitive data requires protection due to the risk and magnitude of loss or harm that could result from inadvertent or deliberate disclosure, alteration, or destruction of the data. Examples include proprietary data, records about individuals requiring protection under the Privacy Act, and data not releasable under the Freedom of Information Act. Also included is data whose improper use or disclosure could adversely affect the ability of an agency to accomplish its mission.

- The integrity of the data on these devices is the sole responsibility of the user.
- IC staff shall regularly purge devices of all information that could be intercepted and/or used inappropriately should the PDA be misplaced or stolen.

Training:

- IC management shall ensure that all staff provided with PDAs are trained on the basic operations of the PDA, including password protecting it, before permitting its use.

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Additional training on Blackberry functionality is available through CIT at <http://training.cit.nih.gov/>.

- IC management shall ensure that staff annually complete the required the NIH Computer Security Awareness training at http://irm.cit.nih.gov/security/sec_train.html.

Additional Questions:

- For questions on technical information relating to Blackberry devices, see <http://isd.nih.gov/hardware/blackberry.asp> or call 301-435-6847.
- For questions relating to contractual issues, call the NITAAC ECS III Contracting Officer on 301-402-3072.
- For questions related to general management and use of Government property, including PDAs, call 301-496-5711.