

POLICY			
<b>Policy Name</b>	ISO Production Access Policy		
<b>Policy Number</b>	ISO-P018	<b>Version Number</b>	4.1
<b>Supersedes Policy</b>	N/A	<b>Effective Date</b>	9/4/2019
<b>Last Reviewed Date</b>	3/15/2023	<b>Last Revised Date</b>	3/15/2023
<b>Policy Owner</b>		<b>Approved By</b>	
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<b>Date Approved</b>	3/15/2023	<b>Date Approved</b>	3/15/2023

### Objective

This policy is in place to ensure the protection of the confidentiality, integrity, and availability of customer and PlanSource data.

### Responsibilities

*PlanSource Personnel* – PlanSource Personnel are responsible for protecting the information and devices under their control, understanding and complying with PlanSource’s Information Security policies, and reporting any suspicious system activity to management and Information Security.

*Information Security* – The Information Security team (“InfoSec”) manages the development, maintenance and enforcement of information security policies and standards, in accordance with generally accepted best practices, focusing on business and risk objectives.

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### Definitions

*Information Assets* – These are assets that consist primarily of databases and data files, contracts and agreements, system documentation, research information, user manuals, training material, operational and support procedures, business continuity plans, fallback arrangements, audit trails, and archived data.

Information assets also include the physical assets, services, resources, software and intangibles that support the proliferation of information within the PlanSource global enterprise.

- Software Assets: application software, system software, development tools, and utilities;
- Physical Assets: facilities, computer equipment, communications equipment, removable media, and other

equipment;

- Services: computing, communications services and general utilities;
- Personnel: personal qualifications, skills and experience;
- Intangibles: the reputation and image of PlanSource.

*Information Systems* – This is any computer system or application that processes, maintains or stores information used by PlanSource to manage their global enterprise.

*Scrubbed Production Data* – This term applies to data where Personal Identifiable Information (PII) and other Restricted Information have been removed. This “scrubbing” practice must be performed prior to production data being copied to a non-production environment for testing purposes and completed in a manner that does not allow for the restricted information

#### Related Document(s)

- Information Security Policy
- Systems Access Policy
- Remote Access Policy

#### Applicable Standards/Regulations/Citations/References

- ISO 27001:2013

Revision History			
Date	Version Number	Updated By	Description of Update
9/4/19	1.0	TJ Hart	Initial Policy
9/19/19	2.0	TJ Hart	Updated Formatting
2/12/20	3.0	TJ Hart	Annual Policy Update Cadence Removed Governance Reference Added Security Policy reference
4/28/20	4.0	TJ Hart	New Policy format Policy Number Change 20 to 18
3/15/21	4.0	TJ Hart	Annual Review and Approval
3/15/22	4.0	David Christensen	Annual Review and Approval
3/15/23	4.1	David Gilbert	Modified production systems to customer facing production systems
3/15/23	4.1	David Christensen	Annual Review and Approval