DC | HEALTH

District of Columbia Department of Health **Master Portfolio Listing**		**PROCEDURE 702.000** Implementing Office: Office of the Director/Office of Information Technology Training Required: Yes Originally Issued: FEB 10 2022 Revised/Reviewed:
Approved by: LaQuandra S. Nesbitt MD, MPH; Agency Director	**Review by Legal Counsel:** Phillip Husband, Esq.; General Counsel	**Effective Date:** FEB 10 2022 **Valid Through Date:** FEB 10 2025

I. Authority	Reorganization Plan No. 4 of 1996; Mayor's Order 1997-42;
II. Reason for the Policy	All DC Health programs use technology to capture and analyze data that assess program outcomes and drive policy decisions. The DC Health Office of Information Technology (DC Health IT) is responsible for ensuring these information technology (IT) platforms are maintained, with program-level requirements addressed as quickly and comprehensively as available resources allow. To ensure DC Health IT maintains full situational awareness over its portfolio, including resources shared across programs, the unit will implement and maintain the Master Portfolio Listing (MPL). The MPL is an electronic document that captures each DC Health program, the IT assets it leverages to conduct its work, and development projects to enhance the program's capacity to meet its requirements. Additionally, the MPL is the primary tool for tracking the DC Health IT financial portfolio, documenting all the Office's agreements to purchase software, hardware, and contract services.
III. Applicability	This SOP shall apply to all DC Health employees, contractors, interns, and summer youth employees. This SOP shall also apply to vendors that are party to an agreement with DC Health. These individuals are referred to collectively herein as "employees" or "DC Health employees."
IV. Policy Statement	Maintaining the MPL is part of the portfolio of DC Health IT. The Chief Information Technology Officer (CITO) is the accountable manager over all tasks assigned to that office.

	The CITO will assign a designee to manage the MPL as a part of their daily duties. The MPL shall contain an entry for every program within DC Health. That entry will, at a minimum, capture: 1. All IT attributes used by the program, i.e. all databases, and applications; 2. All standard queries used by the program, both regularly scheduled queries, and ad hoc queries that meet a program requirement; 3. All standard reports used by the program, both scheduled and ad hoc reports; 4. All projects (planned, in-progress, or historical) to develop or enhance software to meet program requirements; 5. All migrations to and from other systems required as a part of routine operations. Additionally, the MPL will contain a financial tracker. At a minimum, the financial tracker portion of the MPL shall contain: 1. A detailed breakdown of DC Health IT procurements, both the original signed agreements, and any approved modifications; specifically: a. All technologies DC Health has purchased, e.g. application platforms, database platforms, cloud hosting environments, and agreements to purchase/lease hardware; b. All agreements for contract services, e.g. software developers, service agreements for purchased/leased hardware, or third-party services to support/maintain DC Health software. 2. All current year expenditures on the aforementioned agreements; 3. Historical data on IT expenditures for a minimum of three (3) fiscal years. All IT projects shall be documented in the MPL in advance of a formal kickoff. At a minimum, the MPL listing of a project will include: 1. The attributes where development will occur; 2. The planned deliverables via a link to the DC Health IT DevOps solution;

	3. The roles of any DC Health IT staff, DC Health IT contractors, and/or third-party vendors who will be serving on the project. 4. A listing of change management deliverables attached to the project including but not limited to release notes, end-user training, and user guides; 5. Documentation of how the software the project produces will be supported, including but not limited to end user help desk requests, bug fixes and enhancements to accommodate changing functional requirements. Queries, migrations, and reporting requirements will be documented for all programs in the MPL. Where DC Health IT support is necessary to maintain required queries, migrations or reports, the MPL will include the personnel assigned to those support tasks. Any employee out of compliance with any part of this SOP may be subject to commensurate disciplinary action.
V. Definitions & Acronyms	**Attribute-** An application, database, or any other software asset that supports a Program. **DC Health IT-** DC Health Office of Information Technology **DevOps-** A set of practices that combines software development (Dev) and IT operations (Ops). It aims to shorten the systems development life cycle and provide continuous delivery with high software quality. DevOps is complementary with Agile software development; several DevOps aspects came from the Agile methodology. **IT-** Information technology **Migration-** The shifting of data or software from one system to another. Depending on the project, an IT migration could involve one or more kinds of movement: Data migration, application migration, operating system migration, and cloud migration. **MPL-** Master Portfolio Listing

	Query- A request for data or information from a database table or combination of tables. This data may be generated as results returned by Structured Query Language (SQL) or as pictorials, graphs or complex results, e.g., trend analyses from data-mining tools. **Program-** A group of employees within DC Health with a defined scope of practice and an accountable manager. **Project-** An information technology project is a temporary effort undertaken by or on behalf of the university that: 1. Establishes a new technology-based system or service 2. Facilitates a significant business process transformation using technology; or 3. Includes a major change in technology architecture or a system migration beyond that considered as general maintenance, enhancement, or refresh activity. **Report-** The formatted result of database queries that contains useful data for decision-making and analysis.
VI. Procedures	None
VII. Contacts	Chief Information Technology Officer
VIII. Related Documents, Forms and Tools	Master Portfolio Listing