

## Explanation of each process step of the Service Portfolio Review Process v6

- Regular review interval for each review type is once a year:
  - Services in Portfolio
  - Selection criteria
  - Portfolio processes
- Review should be finished until the end of each year to be able to integrate the results into the next yearly report
  - Start review in September/October

Process step	Role	Its detailed content	Step applicable for review of		
			Services in Port- folio	Sele- ction criteria	Port- folio pro- cesses
Starting points		<ul style="list-style-type: none"> <li>- Regular review interval is reached</li> <li>- Ad hoc review is required</li> </ul>	Yes	Yes	Yes
Check Review register for content	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Anytime someone discovers potential for improvement, one can write down ideas in the Review register</li> <li>- Once a review is done, the register is checked for content and ideas are evaluated (and taken into review)</li> </ul>	Yes	Yes	Yes
Create Review documentation based on Review checklist	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Create Review documentation based on Review checklist (Template) and fill in some general information on planned review</li> </ul>	Yes	Yes	Yes
Define scope/focus of review and plan action	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Define what should be reviewed – services in Portfolio, selection criteria and/or Portfolio processes</li> <li>- Include ideas from Review register here</li> <li>- Adapt Review documentation according to defined scope</li> </ul>	Yes	Yes	Yes

Process step	Role	Its detailed content	Step applicable for review of		
			Service s in Port- folio	Sele- ction criteria	Port- folio pro- cesses
Inform service provider about upcoming review	Service Portfolio Manager	- Service providers are informed about the upcoming review and that the review will soon be triggered via Plony	Yes	Yes	Yes
Trigger review of service information in Plony	Service Portfolio Manager	- Press button in Plony to trigger review of service information for all services - Service Owners are automatically notified via E-Mail and asked to check whether the service information are still up-to-date	Yes	No	No
Check whether service information are still up-to-date	Service Owner	- Go through all service information and evaluate whether they are still up-to-date	Yes	No	No
Confirm that service information are up-to-date in Plony	Service Owner	- If service information are still up-to-date, press the corresponding button in Plony to confirm - Please note that this button can only be used if all mandatory service information fields are filled – if any is missing, the Service Owner needs to create a new change request to close information gaps	Yes	No	No
Create a new change request to adapt outdated service information in Plony	Service Owner	- Press the “Edit” button to adapt the outdated service information - Save adapted service information	Yes	No	No
Submit change request to HIFIS	Service Owner	- Switch to the “Change request” tab to submit the change request to HIFIS for approval	Yes	No	No

Process step	Role	Its detailed content	Step applicable for review of		
			Service s in Port- folio	Sele- ction criteria	Port- folio pro- cesses
Check change request (incl. possibly necessary discussion with HIFIS Team)	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Check adapted service information</li> <li>- Put service information changes that require discussion with HIFIS into corresponding GitLab issue and ask HIFIS Team for approval</li> </ul>	Yes	No	No
Give feedback to Service Owner to and ask to adapt change request	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- If the HIFIS Team discussion results in the desire to adapt the change request handed in, the Service Portfolio Manager forwards the feedback from the HIFIS Team to the Service Owner and asks to adapt the change request</li> </ul>	Yes	No	No
Give change request back to Service Owner	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- The change request can only be adapted if it is given back to the Service Owner in Plony</li> </ul>	Yes	No	No
Adapt change request	Service Owner	<ul style="list-style-type: none"> <li>- Adapt change request according to the feedback received from the HIFIS Team</li> </ul>	Yes	No	No
Accept change request in Plony	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- If the HIFIS Team agreed to implement the changes requested, the Service Portfolio Manager accepts the change request in Plony</li> <li>- Service Owners are automatically notified via E-Mail about accepted change request</li> </ul>	Yes	No	No
Document changes in review documentation	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- To keep track of service information changes conducted during the review, the Service Portfolio Manager documents the changes in the review documentation</li> </ul>	Yes	No	No

Process step	Role	Its detailed content	Step applicable for review of		
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Check whether service Exclusion criteria are still fulfilled by each service in Portfolio	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Go through services in Portfolio and check for each if Exclusion criteria are still fulfilled</li> <li>- Document which services fail to fulfill Exclusion criteria (and why they fail)</li> </ul>	Yes	No	No
Review service selection criteria	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Add, adapt, or delete service selection criteria</li> <li>- Document which changes have been conducted</li> </ul>	No	Yes	No
Check whether service Exclusion criteria are still fulfilled by each service in Portfolio	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- If service Exclusion criteria have been adapted, it is required to check whether all service still fulfill the Exclusion criteria</li> </ul>	No	Yes	No
Review Service Portfolio processes	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Evaluate how currently established processes work and if there is a need for adaptation</li> <li>- Adapt process(es) if required</li> <li>- Document adaptations made</li> </ul>	No	No	Yes
Check whether technical adaptations are necessary due to changes	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Since many processes are built into supporting tools, it is required to evaluate whether workflows built in the tools need to be technically adapted, too (e.g. in Plony)</li> </ul>	No	No	Yes
Document preliminary review results and corresponding changes/ recommendations	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Summarize results made for each Review type into the Review documentation's preliminary results</li> <li>- Conclude and document recommendations from review results</li> </ul>	Yes	Yes	Yes

Process step	Role	Its detailed content	Step applicable for review of		
			Service s in Port- folio	Sele- ction criteria	Port- folio pro- cesses
Inform HIFIS coordinators about preliminary results/ bigger changes implemented or recommended due to the review and ask whether they want to make use of their veto right	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Inform coordinators about conducted changes</li> <li>- They have a VETO right here if they do not agree with recommended changes</li> <li>- HIFIS coordinators are free to inform HIFIS Steering Committee about conducted changes/ask for their approval</li> </ul>	Yes	Yes	Yes
Adapt preliminary review results and corresponding changes/ recommendations according to HIFIS coordinators feedback	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Integrate HIFIS coordinators' feedback into preliminary results in Review documentation</li> </ul>	Yes	Yes	Yes
Conduct HIFIS internal changes e.g. on Process Framework	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- If required, adapt Process Framework, documentation, HIFIS Website or any other HIFIS internal document/tool, especially when processes or selection criteria were adapted</li> </ul>	Yes	Yes	Yes
Document final review results and finalize Review documentation	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Finalize preliminary results to final results</li> <li>- Finalize review documentation as soon as everything is documented</li> </ul>	Yes	Yes	Yes

Process step	Role	Its detailed content	Step applicable for review of		
			Service s in Port- folio	Sele- ction criteria	Port- folio pro- cesses
Initiate Offboarding for services, if required	Service Portfolio Manager	- If service in Portfolio is not fulfilling Exclusion criteria anymore and service provider decided not to adapt the service, initiate service Offboarding	Yes	Yes	Yes
Set date for next regular review	Service Portfolio Manager	- According to regular review interval, set date for next regular review	Yes	Yes	Yes
Empty Review register	Service Portfolio Manager	- Delete ideas from Review register that have been implemented during the review	Yes	Yes	Yes
Conduct lessons learned	Service Portfolio Manager	- Think about what could have gone better during the review and write down lessons learned for next review	Yes	Yes	Yes