



5.10.1 Portfolio and Project Management

Chapter 5 - Information Technology	Original Effective Date: November 2005
Section: 5.10 Portfolio and Project Management	Date Last Reviewed: July 2022
Responsible Entity: Vice President and Chief Information Officer	Date Last Revised: July 2022

I. Purpose

The purpose of this policy is to provide oversight to help leverage resources, reduce project risk, and mitigate unnecessary duplication while improving information solutions delivered to the institution.

II. Scope

This policy applies to enhancements of existing technology products and the implementation of new technologies.

III. Policy

- A. Projects involving Information Technology (IT) for each mission area and the administration are requested and prioritized for planning and execution through the Project and Resource Engagement Process known as PREP. All approved projects shall follow the Project Management practices outlined in [PM Processes and Guidelines](#)
- B. Project business case review and prioritization is conducted within one of five (5) domain councils representing UT Health San Antonio (UTHSA) business administration and mission(s).
 - 1. Business Support Service Domain Council (BSS)

Reviews, refines, prioritizes, and authorizes projects having an IT component and supporting strategies for enhancing UTHSA's business and administrative processes and systems including those for Business Affairs, Business Systems and Technology, Human Resources, and UT Police.
 - 2. Clinical Domain Council

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Reviews, refines, prioritizes, and authorizes projects having an IT component and supporting UTHSA's clinical mission. This council has representation from UT Medicine, CTRC, and the Clinical Information Office.

3. Education Domain Council

Reviews, refines, prioritizes, and authorizes projects having an IT component that support UTHSA's education mission. This council has representation from Academic, Faculty, and Student Affairs, Academic and Business Technology Solutions, Academic Scheduling, and the associate deans from each school.

4. Research Domain Council

Reviews, refines, prioritizes, and authorizes projects having an IT Component that support UTHSA's research mission. This council has representation from the Vice President of Research (VPR), UT Medicine, Mays Cancer Center, Clinical Research, Business Affairs, and as necessary from the following:

- a. Across the VPR, UTHSA schools, centers, departments, and divisions – those associated with research and clinical research activities, e.g., research teams (principal investigators, research nurses, coordinators, etc.), financial operations, grants & contracts management, quality assurance & regulatory functions
- b. UT Medicine (patient demographic data, scheduling, billing, EMR notes)
- c. Office of Sponsored Programs (PeopleSoft Grants/Financials)
- d. Affiliate Hospitals (study approval, services provided/billing)

5. Technology Operations and Security Domain Council

The Technology Operations & Security Domain Council serves to improve coordination and prioritization of UTHSA projects focused on computer hardware, network infrastructure, security, and telephony.

- C. Hours and overall complexity determine the level of review and approval for a request. Projects with significant breadth of impact and/or exceeding 1000 person-hours are presented to the Institution Project Council (IPC) with executive management representation from each major mission and business administrative area. The IPC recommends new programs/projects and also reviews and prioritizes programs/projects escalated by a domain council to maintain a desired project portfolio balance across all UTHSA's missions.
- D. New project requests are submitted online using the following link to the [Create New Project Request](#) located within the My Service Center site. During the review process, members of the Project Management Office (PMO) may contact the requestor for additional clarification or information as needed.
- E. UTHSA's Project Management (PM) methodology should be used to execute projects. See [PM Processes and Guidelines](#) for more information.

IV. Definitions

There are no defined terms used in this Policy.

V. Related References

Questions regarding this policy should be directed to the Project Management Office (PMO) at pmo@uthscsa.edu.

Additional Resources:

Texas Administrative Code (TAC) 216 Subchapter C: [Project Management Practices for Institutions of Higher Education](#)

UT System Policy, [UTS 140 Enhancing Major Software Projects](#)

VI. Review and Approval History

- A. The approving authority of this policy is the University Executive Committee.
- B. The review frequency cycle is set for three years following the last review date, a time period that is not mandated by regulatory, accreditation, or other authority.

Effective Date	Action Taken	Approved By	Date Approved
11/2005	Policy Origination		
09/2019	Policy Revision		
07/2022	Policy Revision, discretionary edits	AVP for IT Services/ICPO	07/22/22