

# SOP-0174 - Change Management For Data Warehouse and/or Supplier Changes

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<b>Process Title</b>	Change Management For Data Warehouse and/or Supplier Changes
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## Version Control

<b>Version #</b>	<b>Date</b>	<b>Author</b>	<b>Requestor</b>	<b>Change Summary</b>
1.0	01/16/24	L Sims	L Sims	Initial Creation

## 1. PURPOSE

This document outlines the standard procedure for submitting a change request to the Data Governance Council, that impacts the current data in the data warehouse in general or a current supplier's specific data.

## 2. SCOPE

To provide a Go/No Go decision of any changes to the warehouse that encompasses: (1) the removal of rows/content which were already published, (2) the appearance of content shifting from one column to another, (3) addition and deletion of columns or tables - prior to these changes being made.

## 3. DEFINITIONS

**MCR** - Master Change Request (Jira Card)  
**RFR** - Ready For Review  
**DGC** - Data Governance Council  
**DGL** - Data Governance Lead  
**CO** - Change Owner  
**CMO** - Communications Materials Owners  
**PMO** - Project Management Office

#### **4. POLICY STATEMENT**

The Data Governance Council is a committee of selected individuals responsible for change management and communication of these changes. This governing body helps to ensure that knowledge is shared equitably across the enterprise. The purpose of this council is to review requests for changes to the warehouse and define a communication strategy both internally and externally. This ensures that our employees and clients are aligned with how business operates both now and in the future.

#### **5. ROLES AND RESPONSIBILITIES**

The following leadership and organization roles and responsibilities apply to this procedure.

5.1 The Data Governance Council is made up of the following roles:

1. Chief Executive Officer - Impact Analysis - R&D, Privacy, Sales, RWD
2. Chief Operating Officer - Impact Analysis - Finance, Marketing, Operations, Pricing
3. Chief Technology Officer - Enforcement of Data Governance Policies, Processes, and Procedures
4. Chief of Staff - Support to CEO and COO
5. Chief Data Scientist - Impact Analysis of Privacy Certifications
6. VP - Data Products & Innovation - Impact Analysis
7. VP - Data Insights & Analytics - Impact Analysis including RWD Insights
8. VP - Data Platform & Product Engineering - Impact Analysis
9. Sr. Director - Data Delivery - Impact Analysis
10. Sr. Director - Data Integrations & Operations - Impact Analysis
11. Director - Data Partnerships - Impact Analysis
12. Director - Data Engineering - Impact Analysis
13. Director - Healthcare Transmission - Impact Analysis
14. Data Governance Lead - process guidance, implementation and improvement
15. Project Manager - communication, execution and follow-up

5.2 To move this process forward, the following roles and responsibilities are mandatory:

1. Change Owner - responsible for:
  - a. the involvement and collaboration of all teams that the change impacts
  - b. Involves the SCRUM Master from the PMO
  - c. decides the type of change and moves forward
  - d. Submit the master change request via Jira
  - e.
2. Communication Materials Owner - responsible for:
  - a. provides client facing materials to PMO
  - b. provides updates on implementation and communication materials
  - c. works with PMO to receive executive approval on communication material, if needed
3. SCRUM Master - to be made aware of change via the Change Owner

## **6. SPECIFIC PROCEDURE**

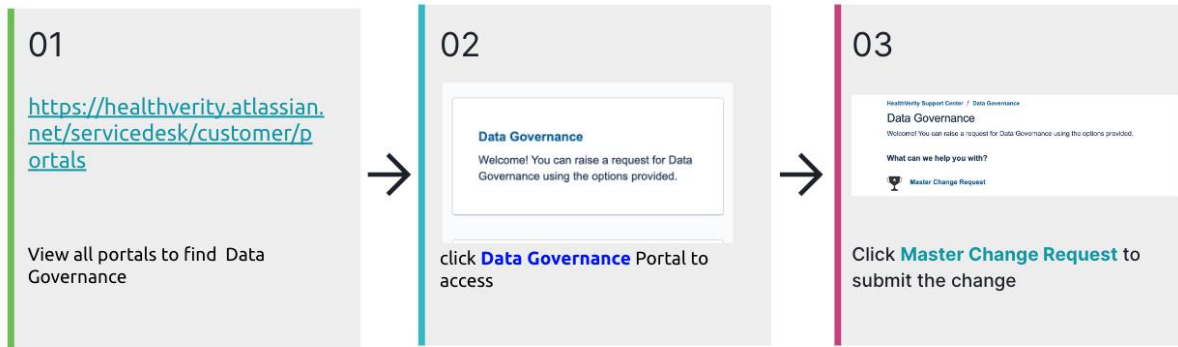
### **6.1 When to Submit A Change Request**

Before any change (add, delete, etc) to something already published in a production table (DW, Green, Datamart, etc) is implemented the following must be done first:

1. The Change Owner will collaborate cross-functionally to develop a satisfactory solution, understand impact to client deliverables, and test the proposed solution
2. The Change Owner may involve their SCRUM Master or PM (if exists) who can provide support collecting feedback, assessing impact, and evaluating LOE
3. The Change Owner may seek input from an individual within the council to confirm this is a change and understand key players that should be involved in solution design

The Data Governance Council will drive messaging (assigning a person, developing the messaging materials, etc) to internal and external stakeholders. However, it is crucial that the Change Owner can speak to the issue and solution in detail, with testing metrics to back it up, as that will drive the messaging.

### **6.2 Where to Submit**



1. Go the Healthverity Support Portal:  
<https://healthverity.atlassian.net/servicedesk/customer/portals>
2. Click **Data Governance** Portal to access
3. Use the “Master Change Request” Jira form located under the Data Governance Portal
4. Click **Master Change Request** to submit the change
5. Fill out the form and attach/link documentation (i.e. release notes)
6. Once submitted, the request stays in “**Backlog**” status and can continue to be modified/refined by the Change Owner
7. When the Change Owner is ready for the request to be reviewed, the Change Owner must:
  - a. Move the request to “**Ready for Review**” status
  - b. Set assignee to Data Governance Lead
8. The change request must be in “Ready for Review” by the EOD Thursday to be on the agenda for the council meeting the following Monday
9. The Data Governance Lead will send out the agenda to the DGC via email the Friday before the meeting

### 6.3 Process Flow

1. The Change Owner is invited to attend the council meeting to discuss the change and conduct Q&A
2. If verbally approved during the council meeting
  - a. The Council assigns a Communication Materials Owner (CMO) to create the material
  - b. The Council decides on timing of implementation
3. The CMO develops the materials, routes them to the Project Manager for approval by executive management; the CMO updates the Jira ticket noting completion of this task
4. Council members formally approve the request via Jira e-signatures. At this point, the change is approved to **GO LIVE** and the approved solution can be deployed (timing dependent upon low to now business distribution)

5. All parties involved will receive an email notification of the status from the Data Governance Lead
6. Once the solution is deployed the Change Owner must update the DGC Jira ticket with this information
7. Project Manager sends the communication materials to the appropriate contacts, both internally and externally; the PM updates the Jira ticket noting completion of this task
8. The ticket is closed (marked "Completed") by the Data Governance Lead or Change Owner

## 7. ASSUMPTIONS AND CONSTRAINTS

This procedure assumes financial, labor and technical resources will be available to support the activities outlined in this SOP.

## 8. EXCEPTIONS

Exceptions to this procedure include any special requests outside the processes outlined above.

1. For **Emergency Changes** (i.e. deployment is needed **within** the next seven days) - an emergency meeting will be scheduled no later than the 24-48 hours
2. For Active Client Opportunity scope changes, the sales team will place scope change requests through the existing Operations process. This scope changes would include:
  - a. Custom data type tables for individual clients
  - b. Adding reference tables for client projects
  - c. Adding non-standard tables for clients

## 9. INTERNAL AND EXTERNAL REFERENCES

### 9.1 INTERNAL REFERENCES

- "Data Gov Council Final Process" Lucid Chart
  - [https://lucid.app/lucidchart/913e95ae-14a6-4589-ad6d-c5f1e6f8e40e/edit?viewport\\_loc=-2777%2C-1018%2C2104%2C996%2CTsDGYiQ.1Bzt&invitationId=inv\\_977cbb08-7da6-482e-bfd2-17cd6e4c6031](https://lucid.app/lucidchart/913e95ae-14a6-4589-ad6d-c5f1e6f8e40e/edit?viewport_loc=-2777%2C-1018%2C2104%2C996%2CTsDGYiQ.1Bzt&invitationId=inv_977cbb08-7da6-482e-bfd2-17cd6e4c6031)

