



FSSA Data Day

Building a Community of Data Users at FSSA

July 22nd 2020



Agenda

1. Opening Statements and Vision - *Connor Norwood*
2. Impact of Data Governance - *Dan Rusyniak*
3. SSBI Project Overview & Introduction to the D&A Team - *Tim McFarlane*
4. Data Governance Roles Overview - *Derrick Cash*
5. Data Literacy Program - *Tim McFarlane*
6. Tableau Server (Dashboards) - *Tony Barker*
7. Optum Performance Analytics for HHS - *Merih Bennett*
8. Teradata/EDW/Cognos - *Lisa Rendon*
9. Enterprise Data Catalog (EDC) - *Tim McFarlane*
10. Code Library - *Sam Sloan*
11. Next Steps and Q&A



Opening Statements and Vision

Connor Norwood

Data Governance Council Mission Statement:

Ensuring secure availability of high-quality data to enable integrated data-informed decision making with measurable outcomes.

It is our commitment as the Data Governance Council to ensure FSSA has...

...the **best tools**

...with the **best data**

...for the **most people**

...with the **highest skill set**

...to leverage in support of the agency's mission to compassionately serve Hoosiers of all ages.



Opening Statements and Vision

Connor Norwood

In many notable ways, FSSA is leading the State in the first two of these areas, deploying significant financial resources in recent years to utilize

The **best tools**

And the **best data**

As an agency, we must now ensure that progress and those investments deliver the maximum impact by engaging

The **most people**

And educating them with the **highest skill set**



Opening Statements and Vision

Connor Norwood

In the fall of 2019, the Data and Analytics Team conducted discovery sessions with over **50** employees representing each FSSA division.

Over **900** pieces of individual input regarding the agency's practices and culture around data were collected and documented.

This input resulted in the agency's first **Data Governance Vision and Strategy** and an **Action Plan** that included a detailed road map to achieve that vision.

One of the core objectives of this strategy is to establish a robust **Data Literacy Program** for staff across each division.





Opening Statements and Vision

Connor Norwood

Data Governance Victory Statements



Strategic Alignment

Efforts supporting data sharing, analysis, and application will clearly align with the agency's vision, receive the necessary support of both staff and financial resources, and be communicated effectively to internal and external stakeholders.



Quality Standards

Data should be comprehensively inventoried, assessed in accordance with common protocols, and continuously improved upon relative to those protocols to ensure priority initiatives are leveraging data of the greatest possible consistency, quality, accuracy, and timeliness.



Privacy and Security

Establish a culture that maintains the highest standards of privacy and security to support the accessibility of data throughout the agency, State, and beyond.



Education and Engagement

Create a data and analytics-enabled workforce consistently engaged in a data-driven culture that leverages data as a strategic asset to achieve agency priorities.



Measurable Outcomes

Data initiatives are aligned with the vision of the agency and outcomes are assessed in a transparent manner to evaluate the effectiveness of key programs.



Opening Statements and Vision

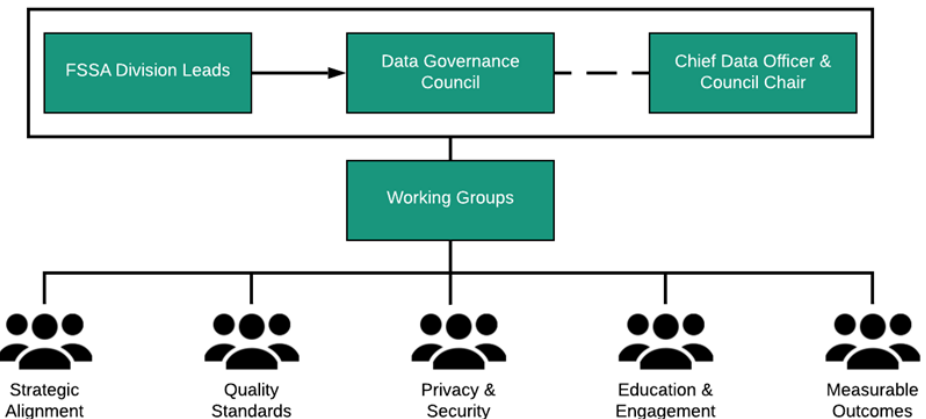
Connor Norwood

Data Governance Council and Structure

Council - The Council, comprised of executive-level FSSA department leads, sets the vision and priorities for improving Data Governance across the agency.

Council Chair - The Council Chair facilitates communication between the Council and the Working Groups, assists in the formation of new policy, and ensures Data Governance efforts are supporting the agency's mission.

Working Groups - The Working Groups, comprised of subject matter experts, data specialists, and key policymakers across FSSA, raise Data Governance issues for Council consideration, provide input on the creation of new policy, and assist in the deployment and adoption of new policy once enacted.

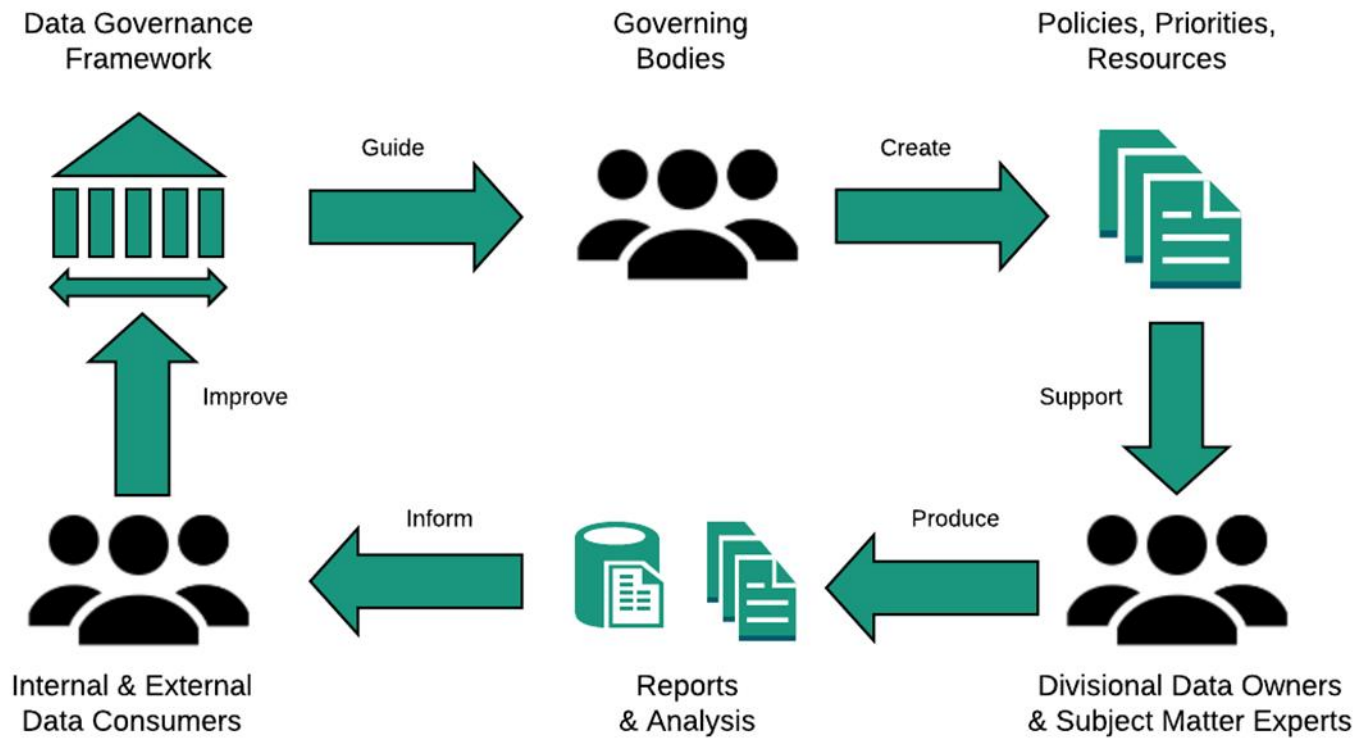




Opening Statements and Vision

Connor Norwood

Data Governance Council and Structure





Impact of Data Governance

Dan Rusyniak



SSBI/Data Governance Project

Tim McFarlane

The **Data Governance Vision and Strategy** and **Action Plan** established a detailed road map including **19** Strategic Objectives and **56** individual Key Results to help drive FSSA towards its data-driven vision. Currently, the Project Team has completed or made progress towards **34** of those individual Key Results. Some of those key milestones include:

- New Self Service Tableau Dashboards for Divisions
- Documentation of Data Governance Issues
- Creation of New Data Governance Roles
- Establishment of Data Literacy Program
- Creation of the Data User Community (DUC)
- Updated Inventory of Agency Data Systems
- Data Catalog Implementation
- Metadata Searchability and Management Processes
- Updated External Data Request Form
- Publication of De-Identification Methodology Document
- Assessment of Staff's Data Literacy Skills
- Development of Code Library
- Execution of Agency's 1st Tableau Visualization Challenge



Introduction to the Data and Analytics Team

Tim McFarlane

Connor Norwood - *Chief Data Officer*

Merih Bennett - *Medicaid Data Strategist*

Josh Galyan - *Senior Systems Administrator*

Chris Maxey - *Senior Manager of Reporting and Analytics, Data & Analytics*

Mark Wiley - *Senior Manager for Data Warehousing & Analytics*

Tony Barker – *Data Architect*

Tim McFarlane - *Deputy Director, Data Science & Analytics*

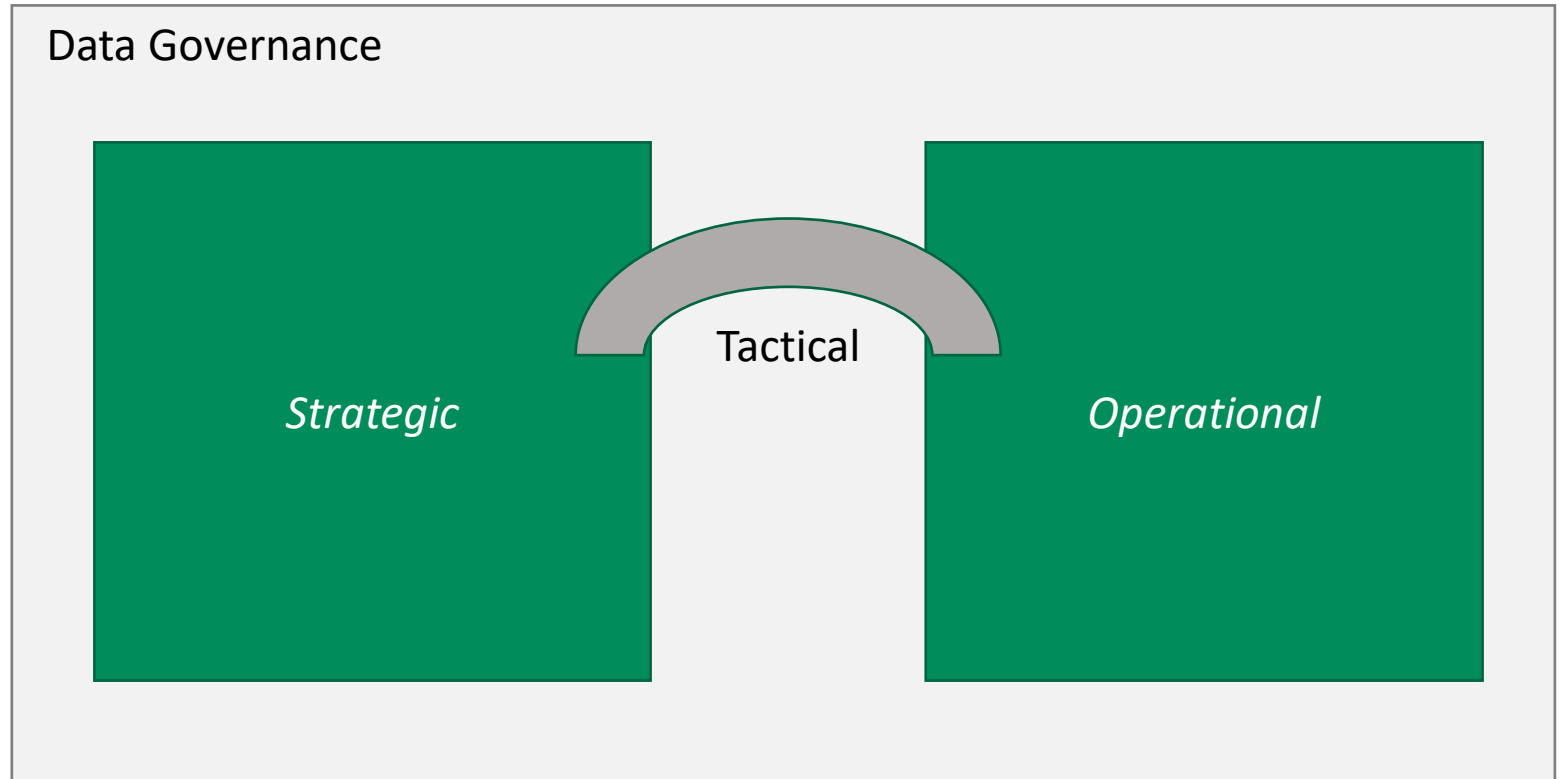
Eddie Shao – *Data Scientist*

Sam Sloan – *Data Scientist*



The Roles of Data Governance

Derrick Cash





The Roles of Data Governance

Derrick Cash

- Remember that governance is the practice of applying **formal accountability**, through roles & responsibilities to **existing operations** and processes **to assure** that the definition and usage of data assures compliance, security, privacy & quality.
- Roles under 3 categories - Critical Success Factors
 - **Strategic** - Executive Sponsors/Data Gov. Council
 - **Tactical** - Data/Business Owners, Data Stewards
 - **Operational** - Data Custodians, System SMEs

FSSA GOVERNANCE ROLES

GOVERNANCE COUNCIL - STRATEGIC



- ◆ Monitors Program Effectiveness
- ◆ Sets Targets for Program (Metrics for Outcomes)
- ◆ Sets/Approves Policy (Workflow, Processes, Lifecycle, Business Rules)

BUSINESS/DATA OWNERS - TACTICAL



- ◆ Knowledge Base
- ◆ Responsible/Accountable
- ◆ Planning
- ◆ Policy/Decision Input
- ◆ Final Arbiter

DATA STEWARDS - TACTICAL



- ◆ Chief Problem Solvers
- ◆ Monitor, Measures, Reports
- ◆ Business Process/Program Improvements

DATA CUSTODIAN - OPERATIONAL

- ◆ Data Guardian & Operator
- ◆ Warehousing
- ◆ Data Maintenance



Moving from "my data", to "our data"



The Roles of Data Governance

Derrick Cash

The Data/Business Owner

The Data/Business Owner has ownership and accountability of a business operation and/or function that produces or uses data in the organization. These are typically VP/Dir/Leadership level positions and are accountable to maintain data quality, and other risks associated with the data.

- Drive use of data
- Domain knowledge
- Policy Input

The Data Steward

The Data Steward is the tactical business expert who takes responsibility for the correct definition and use of data in a domain or business unit.

- Maintain data assets
- Policy knowledge
- Define data quality

TACTICAL

Data/Business Owner

Data Steward



The Roles of Data Governance

Derrick Cash

The Data Custodian

The Data Custodian ensures data outputs are accessible, maintained, and are developed within their defined business specifications. They are the technical gatekeepers who may inform data stewards and owners while adhering to established guidelines.

- Technical data knowledge
- Ensure data security
- Manage data change

The System Subject Matter Expert (SME)

The System Subject Matter Expert has ownership and accountability of technology and systems used to operate business functions for the organization.

- Maintain system function
- Technical advice/support
- Manage system change

OPERATIONAL

Data Custodian

System SME



Data Governance Roles Analogy

Derrick Cash

1. Policy Setting - “Governance” - FIFA (global), US Soccer and Indiana Soccer (regional) and my club team (local)
 - Define goals, rules, policies, priorities
 - Business led (authority, accountability, responsibility), IT-assisted
 - **Executive Sponsors and Governance Council**
2. Policy Enforcing - “Stewardship” - Soccer Referees
 - Interprets (management by) exceptions to policies, monitors, resolves
 - Business led (authority, accountability, responsibility), IT-assisted
 - **Data/Business Owners, Data Stewards**
3. Data Maintenance - “Execution” - Soccer Players
 - Follow through with changes to date (or rules) and executes standardized resolutions
 - Automate, SOP integration, outsource even
 - Any efficient resource can do this
 - **Data Custodians, System SMEs**





Data Governance Notable Future Items

Derrick Cash

1. How are we looking to capture all these roles?
 - Roles and Responsibilities Matrix
 - ISI
2. How will we make this information available to everyone?
 - Data Governance Roles - SharePoint
3. What do I need to know about responsibilities in each respective role?
 - Division-specific responsibilities
 - Role Specific Training

*Moving from “my data”, to
“our data”*



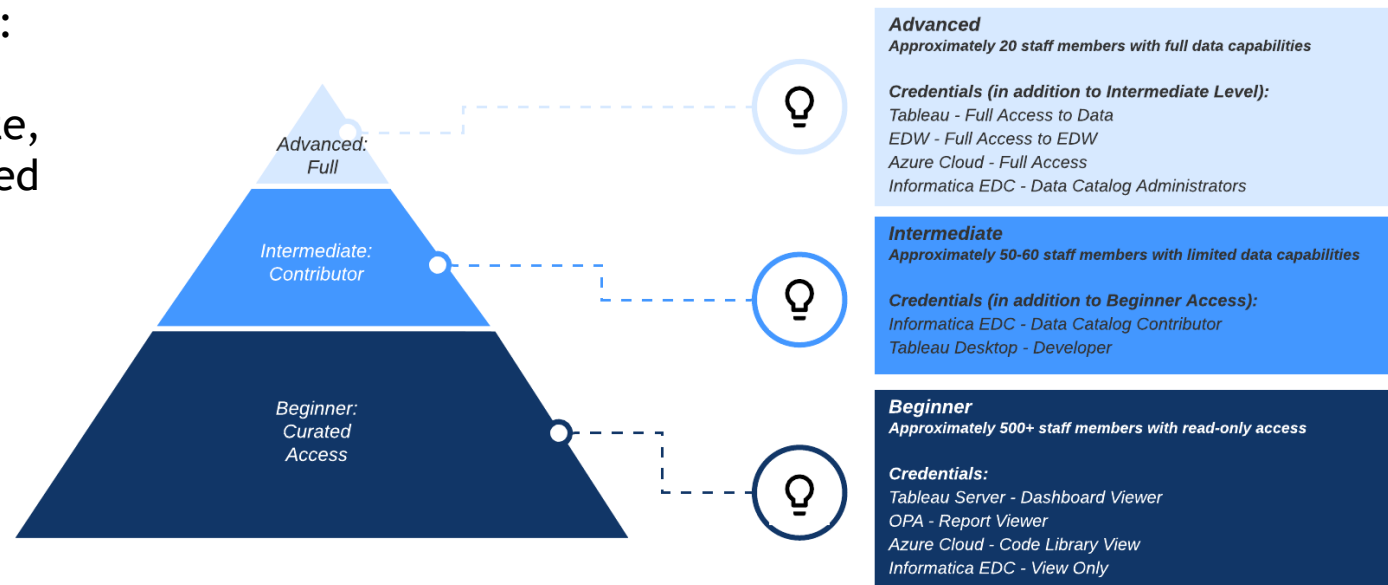
Data Literacy Program

Tim McFarlane

Objective: Introduce staff to tools, to data, and to each other.

Principles: Information provided will be dynamic, comprehensive, inclusive, accessible, and measurable in its impact.

Skill Levels:
Beginner,
Intermediate,
and Advanced

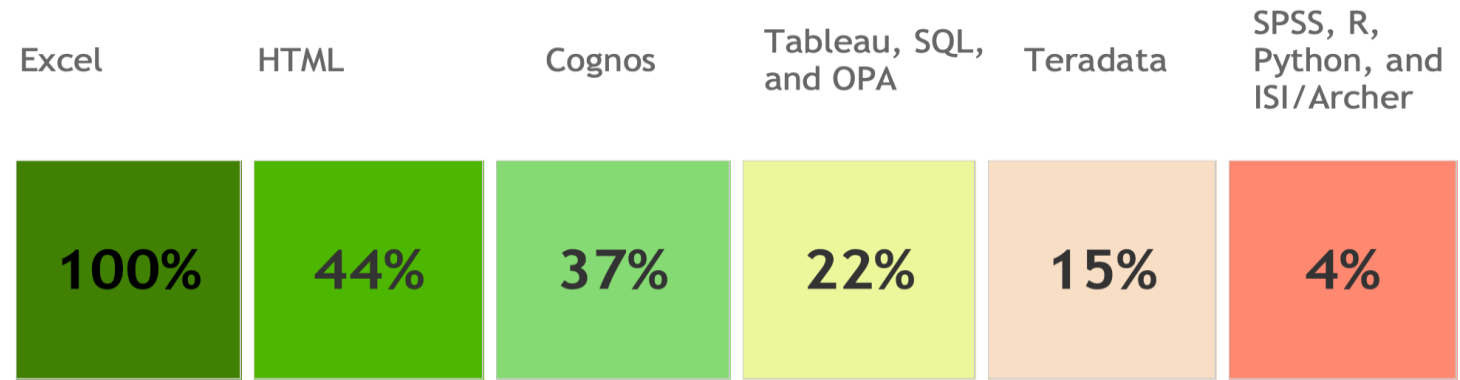




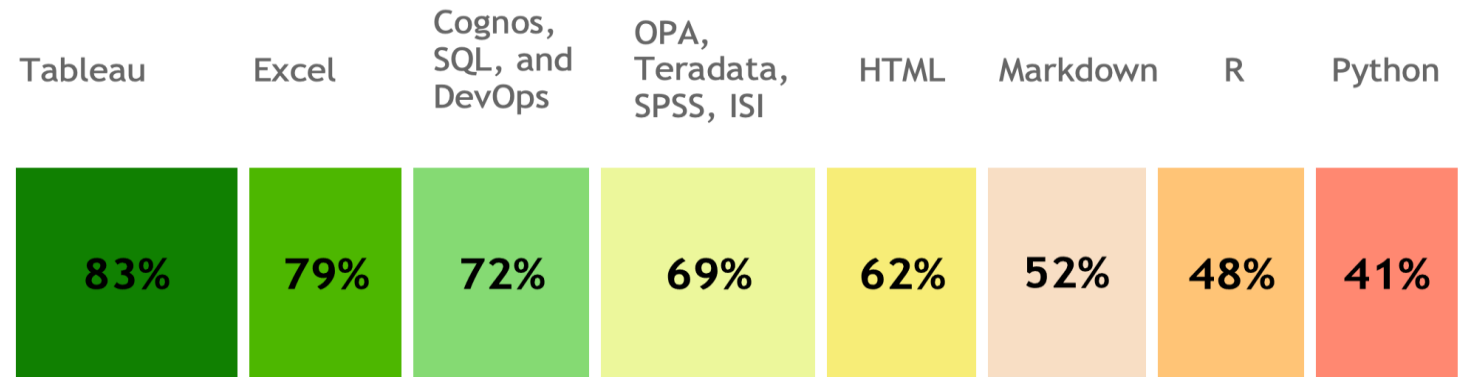
Data Literacy Skills Survey

Tim McFarlane

% of surveyed population with moderate to extreme knowledge of tool



% interested in learning more about tool (greatest to least)





FSSA Data Challenge

Tim McFarlane

To help launch this Data Literacy Program and accelerate adoption across divisions, the Data and Analytics Team is hosting an agency-wide data visualization competition.

- Participants are encouraged to provide insights on FSSA populations and creative recommendations for improving health outcomes.
- Participants are limited to current FSSA staff.
- Teams can be comprised of up to five participants.
- Submissions will be made in the form of Tableau visualization dashboards
- Use of newly available FSSA data is required.

The FSSA Data Challenge will culminate on Wednesday, August 26th with a submission showcase where teams will have the opportunity to present their Tableau submissions with the best teams receiving recognition.



Tableau Server *Tony Barker*

What is Tableau Server?

"Online hosting platform for visualizations, data sources, and more built to govern self-service analytics at scale"

Host and Share Visualizations

Build visualizations





Tableau Server

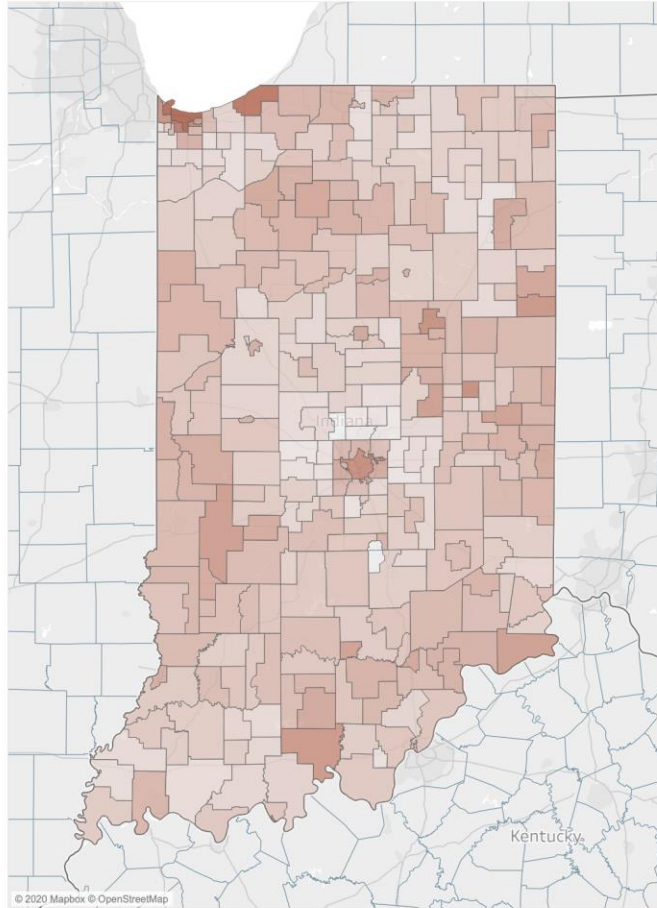
Tony Barker

How will Tableau Server support your operations?

- Sharing
- Governance
- Collaboration
- Controlled Customization
- Optimization
- Automation
- OPA Compatible



% School District Poverty for 2018



County Names
 (All)

Year
 < 2018 >

Show history

< Darker shaded school districts have a greater percentage of poverty students

<< Select a school district on the map and the related county bubble in the scatter plot chart will be highlighted.

> Different colored bubbles reference Indiana school districts. The size of the bubbles reference number of students in the specific school district



% School District Poverty for 2018

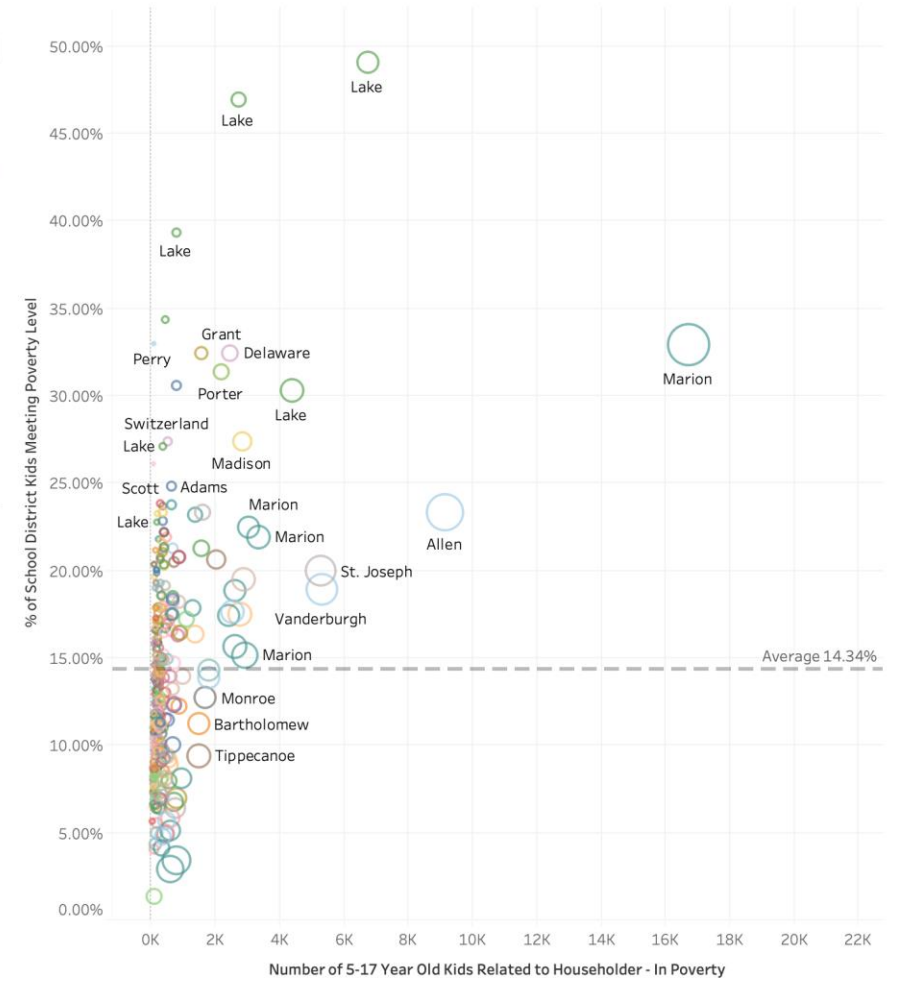




Tableau Server

Tony Barker

Browser address bar: vizdev.fssa.in.gov/#/projects/53?contentType=project,view,datasource

Page title: Explore / FSSA - Aging

Search bar: Search

Project Name: FSSA - Aging
Owner: Hogenmiller, Morgan
Aging dashboards initiated with the self-service project

Buttons: Create, Select All

Content type: Show all | Sort by: Type

Aging Waiver Population

DESCRIPTION: This dashboard represents the AD and TBI Waiver populations in effect at the left side of the dashboard allow for the views to be analyzed demographically by year, view a breakdown of the Aging waiver population by race, living arrangement, or gender breakdown bar in the bottom right hand corner of the screen.

Total Number of Waivers Granted in 2019:

Waiver Count by County & AAA

AD & TBI Waiver Count by Month

Aging Demographics Dashboard

Aging Waiver Recipients' Alzheimer's and Dementia Related Claims

DESCRIPTION: The Division of Aging monitors members of their waiver population who need specialty care. Alzheimer's and Dementia are highly critical within this population. This dashboard is designed using on those within the Aging waiver population that have made Medicaid claims related to Alzheimer's and Dementia.

Out of 12,299 Aging waiver recipients, 770 made Medicaid claims tied to an Alzheimer's or Dementia diagnosis.

Claim Year: 2018

Recipient County: All

Claimant Race: Recent Race

Living Arrangement: Living Independently

Claimant Living Arrangement: Public Institution

Alzheimers_and_Dementia

Aging Claims Breakdown

DESCRIPTION: As Indiana pushes to bring healthcare to Hoosiers in their homes and communities, it is important to monitor the distribution of current Medicaid claim types, costs, and areas more critical. To explore the Aging population by claim type, click on any claim type(s) to view the cost breakdown and top 10 recipient diagnoses associated with each type.

Common Disease Matrix

Diagnosis	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia	Alzheimer's and Dementia
ALZHEIMER'S DISEASE, UNPECIFIED	2,700	2,700	2,700	2,700	2,700	2,700	2,700	2,700	2,700	2,700
ALZHEIMER'S DISEASE OF NATURE COURSE UNPECIFIED	300	300	300	300	300	300	300	300	300	300
ALZHEIMER'S DISEASE, UNPECIFIED	740	740	740	740	740	740	740	740	740	740
ALZHEIMER'S DISEASE OF NATURE COURSE UNPECIFIED	800	800	800	800	800	800	800	800	800	800
ALZHEIMER'S DISEASE, UNPECIFIED	840	840	840	840	840	840	840	840	840	840
ALZHEIMER'S DISEASE OF NATURE COURSE UNPECIFIED	320	320	320	320	320	320	320	320	320	320
ALZHEIMER'S DISEASE, UNPECIFIED	820	820	820	820	820	820	820	820	820	820
ALZHEIMER'S DISEASE OF NATURE COURSE UNPECIFIED	320	320	320	320	320	320	320	320	320	320
ALZHEIMER'S DISEASE, UNPECIFIED	320	320	320	320	320	320	320	320	320	320
ALZHEIMER'S DISEASE OF NATURE COURSE UNPECIFIED	320	320	320	320	320	320	320	320	320	320

Common_Disease_Matrix

Waiver Recipient Claims and Diagnoses Overview

DESCRIPTION: It is important to the Division of Aging that they monitor key metrics of their population to ensure care. The top 10 diagnoses associated with claims in the table on the right side of the visual contains information on the diagnoses in the bottom right hand corner within the distribution of diagnoses aging waiver claims for.

Claim Count and Cost by Claim

Category	Recipient Count	Number of Claims	Cost
Inpatient	317	1,100	1,100
Long Term Care	1,000	1,000	1,000
Home Health	1,000	1,000	1,000
Hospital/Outpatient	1,200	1,200	1,200
Outpatient	1,000	1,000	1,000
Outpatient - Medical	1,000	1,000	1,000
Outpatient - Non-Medical	1,000	1,000	1,000
Outpatient - Other	1,000	1,000	1,000
Outpatient - Other	1,000	1,000	1,000
Outpatient - Other	1,000	1,000	1,000

Claim Geospatial Breakdown

How many diagnoses has each made claims for in 2020?

Live

Extract

Last refresh Jul 7, 2020, 8:33 AM



OPA (Optum Performance Analytics)

Merih Bennett

Optum Performance Analytics for Health and Human Services (OPA for HHS)

- analytic platform that provides insight, predictions, and support for Medicaid programs and operations

- Visualize complex data from multiple sources
- Single source of truth for insights that will drive decisions
- OPA can help you understand data insights from a member, provider, or program perspective
- User-friendly website that can be used by anyone who is granted access



OPA (Optum Performance Analytics)

Merih Bennett

Optum Reports and Program Areas

*Resources Tab shows list of every OPA report with Program Area and description

Program Areas:

- Financial Analytics
- Managed Care
- Member Engagement
- Population Analytics
- Provider Analytics



OPA (Optum Performance Analytics)

Merih Bennett

OPA and FSSA

Use OPA to improve efficiency and effectiveness in four competencies: medical economics and actuarial analysis, population health management, quality and clinical integration, and provider network management

When would FSSA employees use this tool?

- If manager recommends
- If data analysis is required for your role
- If working on a project involving Medicaid data



OPA (Optum Performance Analytics)

Merih Bennett

Request Access

1. Users need manager approval prior to requesting access to OPA
2. Complete the online data request form
3. Upon form submission users will receive a confirmation email
3. If approved user should be granted access within 5-7 business days

Online form requires business justification - specify aggregate vs member level data

<https://analytics.fssa.in.gov/>



EDW Reporting Tools

Lisa Rendon

Three main reporting tools for using the EDW:

- Cognos Query Studio
- Teradata SQL Assistant
- Cognos Report Studio



Enterprise Data Warehouse

FSSA EDW Portal
Rendon, Lisa M [Log Off](#)
Launch

EDW Portal
Documentation & Training
Management Reports
Public Folders
My Folders

Business Areas & Support

- Documentation & Training
- Management Reports
- Federal & State Reports
- Public Folders

Metadata & Data Dictionary

[Click Here for Data Dictionary](#)

Help Desk

The EDW Help Desk provides technical assistance for:

- FSSA EDW Portal navigation and general inquiries
- Data-related questions
- Creating, saving and running reports
- Cognos functionality and use

To Contact the EDW Help Desk:

Email: edw-helpdesk.FSSA@fssa.IN.gov
 Phone (317) 405-3129

Note : Call Center hours are 8:00 A.M. to 5:00 P.M. Mon-Fri, with the exception of state-identified holidays

Welcome

**ENTERPRISE
DATA
WAREHOUSE
(EDW)**

Important Message - Metadata Manager Upgrade
Go Live

03/01/2019 **Important Announcement:** EDW Metadata Manager has been upgraded from version 9.5 to version 10.2 and will be available from Monday, 03/04/2019 from 8:00 AM.

Please note the following log-in information for Metadata Manager Version 10.2.

- The URL has changed. If you have bookmarked the link to Metadata Manager outside of the EDW Portal, you will need to update your bookmark with the new URL.
- The new URL for EDW Metadata Manager is <https://edw-metadata.fssa.in.gov/mm/>
- The link on the EDW Portal has been updated with the new URL. If you log in to Metadata Manager from the EDW Portal, no additional steps are required.
- Your username should not have User Domain name i.e. FSSA and username not case-sensitive.
- You will continue to select 'EDW' as the Domain.

Announcements

03/01/2019 **Important Announcement:**
 There will be a scheduled maintenance outage for the Informatica Metadata Manager, during which time the EDW will upgrade Informatica Metadata Manager from Version 9.5 to Version 10.2.

Maintenance Start: Friday, 03/01/2019, 4:00 pm
 Maintenance End: Monday, 03/04/2019, 8:00 am

Once the upgrade is complete, please note the following log-in information for Metadata Manager Version 10.2.

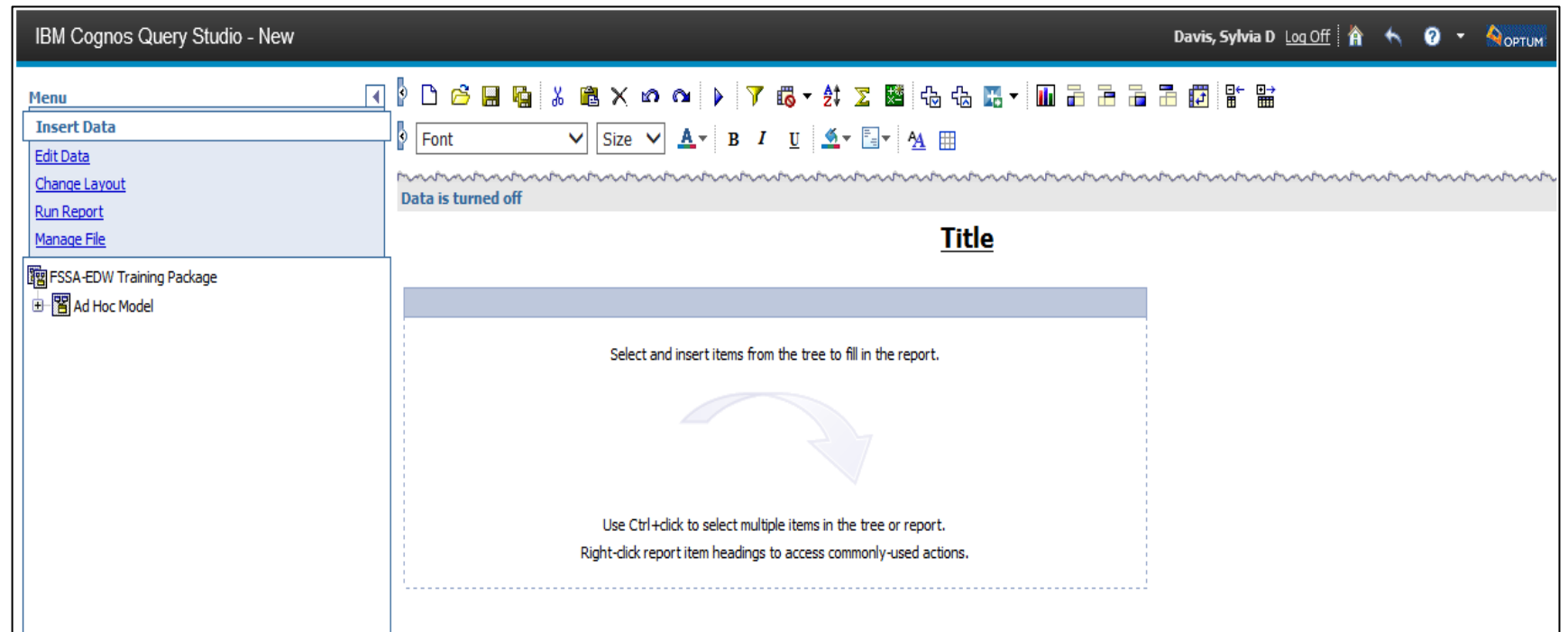
[The Metadata Manager URL has changed](#)

What's in the EDW

Subject Area	Data Source	Load Date	Date Range*
Denied By Plan Encounter	CORE	7/11/2020	01/01/2010 - 07/10/2020
Denied By Plan Encounter	PBM	7/11/2020	01/01/2010 - 07/10/2020
Denied Claim and Denied Encounter - Non Pharmacy	CORE	7/11/2020	01/01/2010 - 07/10/2020
Denied Claim and Denied Encounter - Pharmacy	PBM	7/11/2020	01/01/2010 - 07/10/2020
Diagnosis	CORE	7/11/2020	Full History
Financial	CORE	7/11/2020	01/01/2010 - 07/10/2020
Paid Claim and Paid Encounter - Non Pharmacy	CORE	7/11/2020	01/01/2010 - 07/10/2020
Paid Claim and Paid Encounter - Pharmacy	PBM	7/11/2020	01/01/2010 -

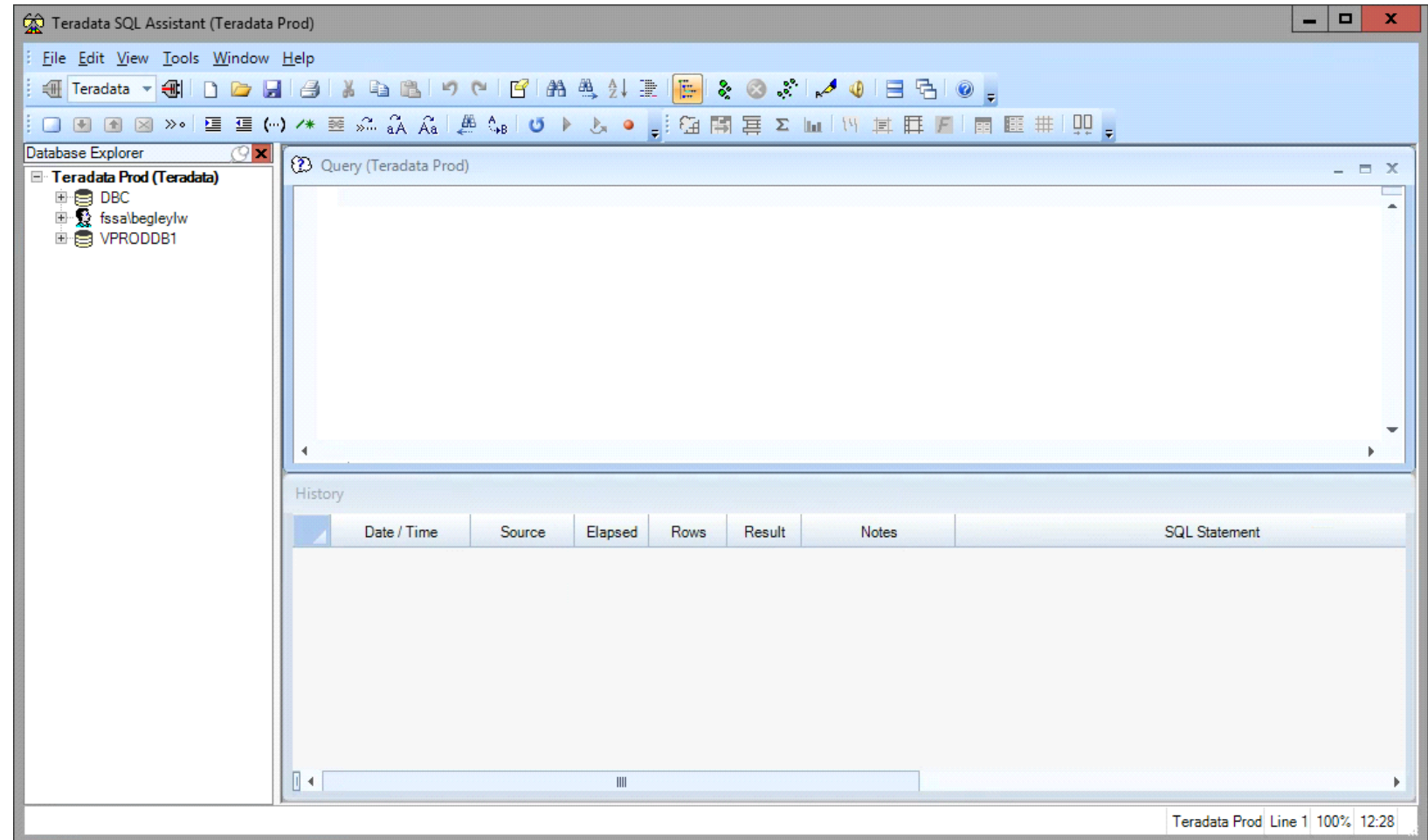


Cognos Query Studio





Teradata SQL Assistant





Cognos Report Studio

IBM Cognos Report Studio

Show this dialog in the future

[Close](#)

The screenshot displays a dashboard with several components:

- Product Life Cycle (PLC) Overview:** A table showing metrics for 'Sales Revenue' (50,839), 'Net Income' (25,190), and 'Marketing Expenses' (787). It also includes a 'Marketing Expenses' section with a value of 21,635 and a percentage change of 14%.
- Trend Analysis - Personnel:** A line chart showing personnel trends over time.
- Performance Ranking - Top Sectors:** A bar chart comparing performance across sectors: Manufacturing, Banking, Retail, and Technology for the years 2010, 2011, 2012, and 2013.
- YTD Overall Target:** A circular gauge showing a 96% completion rate.



EDW Access
Lisa Rendon

EDW Access

Contact Janet Simpson at: datawarehouse.communication@fssa.in.gov

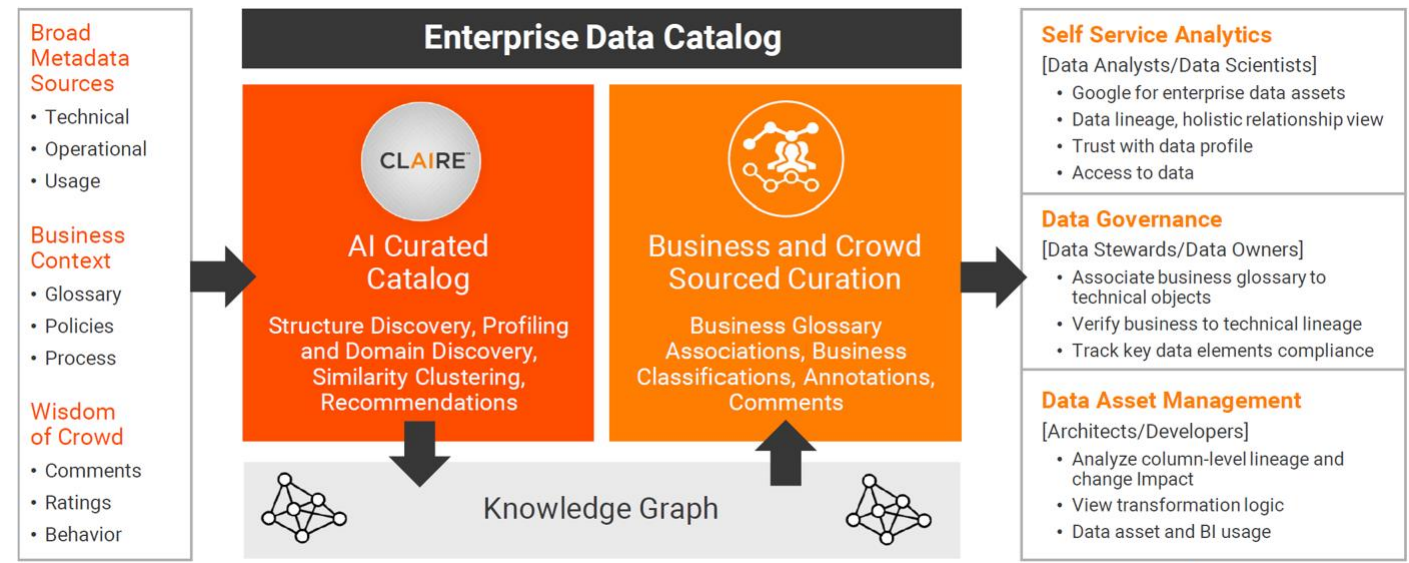


Enterprise Data Catalog (EDC)

Tim McFarlane

– what data do I have?
 – where does the data live?
 – how is the data used?

What is the EDC? – A tool that aims to answer the questions
 A **central place** to collect, index, relate, annotate and share knowledge about data assets





Enterprise Data Catalog (EDC)

Tim McFarlane

The EDC and FSSA – When should people use it, how can it help?





Enterprise Data Catalog (EDC)

Tim McFarlane

How will users access the tool?

- This is not fully finalized but multiple options exist:-
 - Via the FSSA Data Central Portal (SSBI users)
 - From within Tableau (SSBI users) utilizing the Tableau Plug-in option
 - Direct Web Browser Access (Data Stewards and more advanced users)

Do users need to request permission?

- The vision is anyone with a FSSA account should be able to have access



Enterprise Data Catalog (EDC)

Tim McFarlane

How Will EDC Deploy? - What's the Plan?

- Sept. 2020 - EDC Installed and Configured with first pilot use case cataloged (INMAX and EDW)
- Catalog Roadmap (expected to take next 12-24 months to complete)
- Team will be reaching out to Business Owners and Data Stewards over the next few months

How Can You Help?

- Champion that a FSSA Data Catalog will add enormous value across the agency
 - Speeding up data discovery/access
 - Key enabler for SSBI success
 - Reducing duplication in data sets
 - Break down divisional silo's & promote collaboration
- Support the cataloging of systems you own and be open to sharing



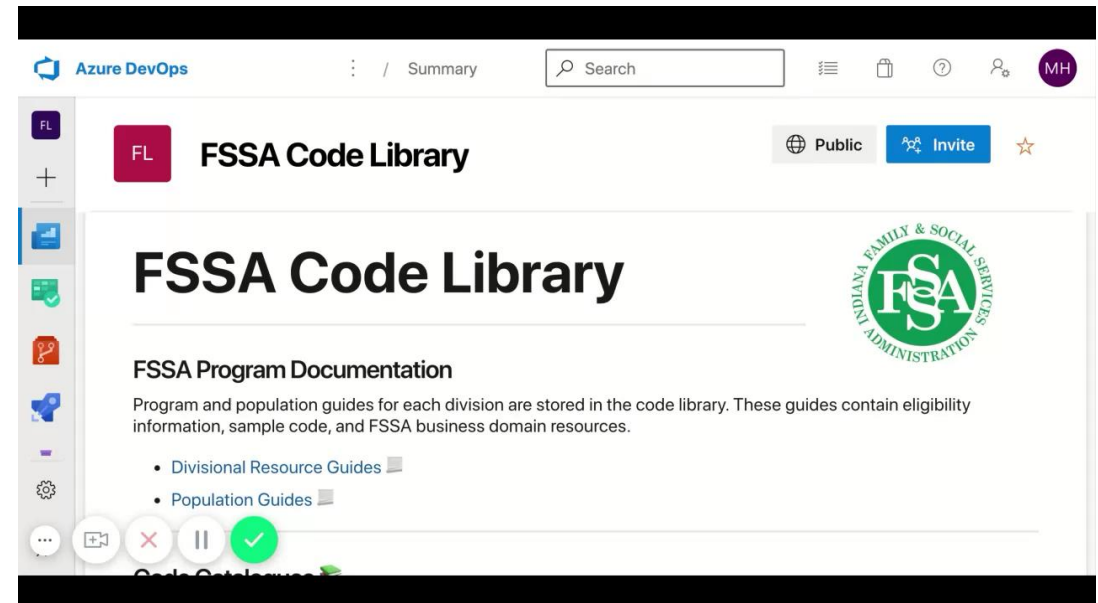
The Code Library

Sam Sloan

The Code Library is a platform for FSSA program documentation, technical trainings, and influential reporting code within Azure DevOps.

Features:

- Divisional Resources and Program Eligibility Guides
- Code Repositories
- Trainings
 - SQL
 - Tableau
 - Markdown
 - DevOps





The Code Library

Sam Sloan

Integrate the Code Library into your daily workflow!

- **Gather project business context** in one location
- **Complete asynchronous trainings** on your own time
- **Efficiently explore others' queries and documentation** across FSSA
- **Collaborate with others** and contribute your own knowledge
- **Build trust** in your data through viewing document change histories



The Code Library

Sam Sloan

How can I access the Code Library?

- **Anyone can access.**
- <https://dev.azure.com/FSSACodeLibrary/FSSA%20Code%20Library>

How will the Code Library be maintained?

YOU can contribute.

- Add program information
- Upload queries
- Share your knowledge by adding trainings
- Document any processes you use to access your systems



The Code Library

Sam Sloan

Call to Action

- Open the Code Library and explore the learning resources available

For more information, contact:

- Sam Sloan (Samantha.Sloan@fssa.IN.gov)
- Morgan Hogenmiller (mhogenmiller@cspring.com)
- Julisa Ricart (jricart@ksmconsulting.com)



Questions and What Comes Next