



*in collaboration with*

**Optum**

**Enterprise Medicaid System  
Data Warehouse/Decision Support System/Business  
Intelligence System**

**EDW Training Plan**

**Enterprise Data Warehouse  
(EDW)**

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## Document Information and Revision History

This section establishes the revision log summarizing changes. It provides a historical record and perspective of the project.

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## 1. Introduction

Optum recognizes that comprehensive training and education on the Enterprise Data Warehouse (EDW) is vital to the FSSA's goals of maximizing the return on its investment in technology and people. As a vital component of services included as part of the EDW, Optum incorporates a comprehensive training program targeted specifically to the needs of the Family and Social Services Administration (FSSA) Users, Analysts and Executive designees.

It is important to note that the future state of EDW will also encompass the OMPP EDW and the Social Services Data Warehouse (SSDW) in one solution, referred to as EDW. Our comprehensive training program will also provide training to all EDW users.

The EDW customized training programs have been delivered successfully for Medicaid Decision Support Systems in other states, such as Arkansas, California, Illinois, Michigan, Minnesota, New York, and Utah. Indiana's EDW training uses Indiana Medicaid programmatic data and concepts and focuses on the Indiana EDW Business Intelligence (BI) software, which is primarily Cognos.

The purpose of this training plan document is to set forth Optum's training philosophy, the targeted population for training, and the type of training required for users based on their expected use of the EDW. Timing of the classes for ongoing training is proposed as well as class size, class content, class times, and class evaluation. Optum's training plan and trainers follow RFP requirements. Feedback from the state, students and observers is incorporated in the lessons and the way users are trained throughout the life of the contract. The training plan is updated periodically as the needs of users and the content of the EDW change over time.

Our EDW Training is targeted to meet the needs of diverse groups of users: Power Users, Business Analysts, and Casual or Executive Users. Training for the EDW addresses a wide variety of audiences and topic areas. Training is ongoing as new users or groups begin using the EDW Solution, new functionality is added to the solution, or Federal guidelines dictate a policy and procedure change during the Operations and Management (O&M) Phase.

Some of the features of the EDW Training include:

- EDW Training is conducted with the FSSA data using customized materials.
- Training sessions are designed to use a team-teaching approach where the instructor provides in-depth knowledge of the application(s) and the technical subject matter expert (SME) provides in-depth knowledge of the FSSA data.

Optum provides a specialized training staff. Our experienced trainers have experience in Medicaid data and many years of teaching experience. The team-teaching approach, placing an instructor and a SME in the classroom, has given Optum a leading edge in the classroom.

The scope of the EDW training program spans the life cycle of the project and covers both the Training requirements of the FSSA/OMPP. The comprehensive nature of

Optum's Training" program contains customizations employing Indiana Medicaid data and business problem examples. The additional degree of customization helps FSSA/OMPP achieve benefits more quickly and addresses the training needs of:

- New end users and technical staff
- Existing end users, who may require refresher training
- Existing end users and technical staff, who may require special guidance and assistance
- End users who require advanced "how to use" classes and seminars covering special FSSA interest areas as may be required from time to time following the deployment of the EDW.

In summary, the EDW training program is an iterative process; improvements unique to the FSSA/OMPP are incorporated as requested and approved by the Optum and FSSA/OMPP EDW Project Managers.

## **2. Training Details**

The Training Plan documents the training environment, staffing, training approach, proposed schedule, and evaluation techniques for all Training sessions. The submission of the Training Plan is in accordance with the RFP deliverable requirement.

Once the Training Plan is reviewed and approved by the FSSA, the standard EDW commercial off the shelf courseware and training materials are customized. Updates to the Training Plan are submitted annually to the FSSA for addressing the specific goals of training for the upcoming year. The plan is updated to reflect additional training that is necessary due to Federal or State regulation changes to programs or policy.

### **2.1. Optum Training Approach**

Optum provides an enriched training approach with the EDW in an optimal training environment and meets the FSSA schedule to give the maximum benefit to the FSSA. The enriched training approach includes:

- Concentration on hands-on exercises
- Team teaching for end users
- Training using FSSA data
- Customized training materials
- Timely training feedback

Optum's training program is instructor-led and characterized by a strong emphasis on hands-on exercises using accurate FSSA data and meaningful FSSA business problem examples. Training is a combination of lecture, student exercises, student questions, and interactive discussions. Students in every class are given a training manual with exercises and other handouts as appropriate. The training materials are submitted for review and approval by the FSSA/OMPP EDW Project Manager or designee annually or as requested. Training manuals, class handouts, practice cases, and end user evaluation are developed in accordance with the overall Training Plan and updated or revised semi-annually. All revisions, updates and notable changes to the Training Plan are supplied to the State upon request.

As a supplement to traditional classroom training, Optum's EDW portal contains all updated training manuals and handouts.

### **2.2. Training Registration**

A tile on FSSA's Data Central has been established to provide the training calendar on a six-month rolling basis. This page contains a direct link to registration and a direct link to the course catalog. See section 5.3 for the sample of the training schedule.

The FSSA Helpdesk confirms the student's eligibility and permission to take the class. Once the student has been confirmed for the class, the Helpdesk will notify IOT to set up access that is needed.

Once all of the registration requirements i.e., approval of manager/supervisor from the State to take the class and confirmation, the trainee will be given access to Cognos by Optum. Optum confirms the registration within five (5) business days of the class. After all confirmation steps are complete a calendar invitation for the class is sent to the student to confirm dates, times and locations.

### **2.3. Environment**

Each of the instructor-led hands-on training sessions is comprised of a maximum of twelve (12) FSSA end users and a minimum of six (6) FSSA end users per class. The training environment used by Optum creates the perfect space for a mixture of lecture, demonstration, and hands-on exercises in a comfortable, productive setting. The technical environment has been established to support concurrent training classes, as necessary.

Generally, classes are held from 9 am to 4 pm with an hour allocated for lunch and a fifteen (15) minute break in the morning and afternoon. For the convenience of State staff, all training sessions are held in State of Indiana facilities.

### **2.4. Staffing**

Training is the responsibility of the EDW Training Coordinator. The EDW Training Coordinator directs all training personnel who will be professional trainers, staff with specific training skills, SMEs, or other personnel as required, to satisfy the obligations of the contract. Optum training staff is augmented with SMEs for many training activities. SMEs review all training materials for content and approve all State specific manual inclusions for validity and Indiana specific Medicaid applicability. Optum SMEs suggest scenarios and general curriculum content that meet the needs of the Indiana Medicaid program.

As part of the team-teaching approach in the traditional classroom, in addition to the primary instructor who is a qualified expert in the EDW tools, Optum provides a SME (a data specialist with business and tool knowledge) in the classroom to allow for real-time coaching and guidance to end users as may be necessary during the training sessions. Optum knows that an experienced data specialist with application knowledge can monitor from the back of the classroom keeping all students up to the pace of the class. When data questions are asked, the expert is available for immediate answers. This team-teaching approach has been very successful in ensuring that all students benefit from the training. Dedicated staff is assigned to instruct the FSSA end users.

### **2.5. Materials**

As part of the overall learning experience, Optum provides the latest training methods using current-state materials and handouts detailing specific EDW processes that relate to target audiences. Training materials are reviewed and updated prior to each session. Optum developed and maintains guidance materials and reference handouts for individual EDW training sessions.

All materials are provided to the State for review prior to inclusion in manuals and reference guides. Optum suggests information required in the training materials and the State approves or suggests any relatable information for insertion or update. All manuals and guides are generated from the most current system and technical environments available and are submitted to the State for approval prior to use and are updated annually. The learning manuals and training references are edited to ensure a common presentation format; and a copy (e.g., paper, binder) are provided to all participants. Each item of documentation regarding training, including processes, reference and integrated manuals are posted to the Optum portal for viewing electronically. Updates to the training materials are provided on a State defined timeframe.

As a supplement to traditional classroom training, FSSA's Data Central contains all updated training manuals and handouts. In addition, Optum offers desk side assistance and refresher instruction.

## 2.6. Schedule

Optum's training class schedule offers a variety of dates and times to afford State staff, in cooperation with all vendors, the opportunity to balance work and learning schedules according most efficiently to the user's availability.

User groups are described as follows:

- **Power Users:** A subject-matter expert (SME) or domain expert is a person who is an expert in a particular area or topic.
- **Business Analysts:** This position analyzes the existing or ideal organization and design of systems, including businesses, departments, and organizations. BAs also assess business models and their integration with technology.
- **Executive:** An individual who utilizes only the rudimentary features of the application, i.e. predefined reports

The following table displays all user groups and the courses in which they will participate. See Section 3 Course Listing for complete course descriptions.

Training Class Specifics

Course	Power Users	Business Analysts	Executive Users	Course Duration
SQL Assistant	X	X		1day
Report Studio	X	X		2 days
Cognos Portal	X	X		1 hour



Course	Power Users	Business Analysts	Executive Users	Course Duration
Informatica Metadata Manager	X		X	1 hour day
FSSA Data Central	X	X	X	½ hour
OPA	X	X	X	½ day

Classes are available to State designated users based on authorized access and assigned work task roles. Optum conducts training classes scheduled on state needs and availability.

## **2.7 Ongoing and Advanced Training**

During the life of the contract, ongoing training will be offered each year on a quarterly basis for new end users and users who may want a refresher class. The following training schedule has been proposed to meet this need:

- Up-to four (4) hands-on classes per year for Cognos Report Studio, including the Cognos Portal. An overview of the EDW \, FSSA Data Central and Metadata Manager is included.
- Up-to four (4) hands-on classes per year for Cognos Report Studio.
- Up-to four (4) classes for Teradata SQL Assistant or advanced topics.

Topics for the advanced training or seminars are identified through Helpdesk inquiries and survey responses with final agreement from the FSSA/OMPP. Some topics may be applicable to a large group of users and therefore more suitable for traditional classroom training.

- Optum will provide user training throughout the length of the contract for System functionality upgrades and enhancement upgrades within thirty (30) State business days of installation of the upgrade or enhancement.
- Optum will provide user training throughout the length of the contract for System policy and procedural changes because of Federal Guideline changes to the Medicaid program within thirty (30) State business days of installation of the updates.
- Optum will provide training for the Social Services Data Warehouse (SSDW) during the transition period to existing Optum users and subcontractors who are new to Optum.
- Throughout the length of the contract, Optum will provide new hire and refresher training on the SSDW.

- Throughout the length of the contract, Optum will provide user training on the SSDW as a result of budgeted enhancements by the State.

Hands-on training will be provided as needed to as many users as there are Cognos licenses, understanding that staff turnover will necessitate training even if Cognos licenses remain static.

## **2.7. Training Evaluation**

The training evaluation assesses:

- The training environment
- Course materials
- Presentation
- Applicability to current work assignment
- Overall impressions or recommendations for improvements

All new state staff receives appropriate and timely coursework and materials related to their assigned work areas as necessary for them to perform their functions and are assessed as to their competency before, during and after the training course(s).

Learning Evaluation detail areas are measured using various methods and are illustrated in the following grid.

<b>Level</b>	<b>Evaluation Type</b>	<b>Description</b>	<b>Method(s) or Practicality</b>
1	Reaction	How the state staff feel about the learning experience	Feedback forms based on subjective personal reaction to the training experience.  Verbal reaction which can be noted and analyzed.  Post-training surveys or questionnaires through online evaluation or grading by state staff.  Subsequent verbal or written reports given by state staff to managers back at their jobs.

Level	Evaluation Type	Description	Method(s) or Practicality
2	Learning	Measures the increase in knowledge—before and after	<p>Methods of assessment are to be closely related to the aims of the learning.</p> <p>Measurement and analysis on a group scale.</p> <p>Established reliable, clear scoring and measurements, limiting the risk of inconsistent assessment.</p> <p>Hard-copy, electronic, online or interview style assessments are all possible.</p>
3	Behavior	Applied learning on the job—implementation	<p>Assessments can be designed around relevant performance scenarios, and specific key performance indicators or criteria.</p> <p>Self-assessment can be useful, using carefully designed criteria and measurements.</p>
4	Results	<p>Measures would typically be business or organizational key performance indicators, such as:</p> <p>Volumes, values, percentages, timescales, return on investment, and other quantifiable aspects of organizational performance, numbers of</p>	<p>It is possible that many of these measures are already in place via normal management systems and reporting.</p> <p>It is important to identify and agree accountability and relevance with the trainee at the start of the training, so they</p>

		complaints, staff turnover, attrition, failures, wastage, non-compliance, quality ratings, achievement of standards and accreditations, growth, retention, etc.	<p>understand what is to be measured.</p> <p>This process overlays normal good management practice - it simply needs linking to the training input.</p> <p>Annual appraisals and ongoing agreement of key business objectives are integral to measuring business results derived from training.</p>
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Training feedback is applicable to UAT, Initial and Ongoing training and is collected by Optum through the On-Line Training Evaluation System. As an integral part of the proposed training program, the On-Line Training Evaluation feedback system allows for timely student feedback on both the courseware and the instruction. This creates opportunities for introducing near real-time training program improvements. The FSSA will benefit from timely feedback, which can be incorporated into our training courseware and delivery for future classes.

The training evaluations consist of a series of questions pertaining to six major categories of training including:

1. Data Warehouse Access
2. Class Content
3. Instructor Evaluation
4. Class Materials
5. Class Structure
6. Value of the Class

All responses are recorded on a 5-point Likert scale (Strongly Agree to Strongly Disagree); results are shared with the Optum and the FSSA/OMPP EDW project leadership. In addition to the standard questions, each end user can add their individual comments for each category supplying open-ended responses for what went well, what needs improvement, and future training sections. The answers to the comments and open-ended questions are particularly useful in gaining specific suggestions for training improvements and enhancements.

Training feedback is enhanced with the annual solution survey and follow-up with the EDW users. As end users of the system, they will have an opportunity to comment on their training after months of experience putting into practice what they have learned in their training classes. The end users and non-users (users trained but for some reason do not access the system) are asked to comment on their training satisfaction. Optum

can link usage patterns or barriers to usage with the training satisfaction comments and have an opportunity to improve training delivery to better meet the needs of all users. Comments received in the survey serve to enhance the training program. Among survey comments, Optum has learned that on-line access to training materials for refresher training purposes is a necessary ingredient to a successful data warehouse program. Optum provides such refresher training through the EDW On-Line Training.

### **2.8. Document Updates**

This Training Plan is updated at least annually by the EDW Training Coordinator. The plan will be updated as often as required to reflect the status of training for the project.

Optum provides ten (10) State business days to make appropriate changes and/or modifications in cases where the State disapproves of vendor training recommendations, including but not limited to: staff trainers, training courses or content, presentation methods, training plans, training manuals, updates, or status reports.

The Training Plan will be approved by the State and updated and changed based on State feedback and will be directed to subject topics as required by the State. Materials utilized in classroom or online are the most current available for all learning courses and classes.

### **2.9. User Access**

FSSA Data Central allows the students to access on-line supplemental documents, e.g. Frequently Asked Questions (FAQ) and any relatable User Access documents, as categorized by stakeholder topic. Data Central is updated in a timely manner and all documents are available to download.

### 3. Course Catalog

#### FSSA EDW Course Catalog

Training Course(s)	Description	Audience
<p>Introduction to EDW:</p> <ul style="list-style-type: none"> <li>• Introduction to the Enterprise Data Warehouse (EDW)</li> <li>• FSSA Data Central Overview</li> <li>• FSSA Data and Analytics Cognos Portal</li> </ul> <p>Informatica Metadata Manager</p>	<p>This is a great place to start! This course is a 3-hour session that will require users to participate in hands-on activities. This course is appropriate for all that are new to FSSA and new to the EDW.</p> <p>There are 4 core parts in this training:</p> <ol style="list-style-type: none"> <li>1. Introduction to the Enterprise Data Warehouse (EDW) - Introduces the history and evolution of the EDW</li> <li>2. FSSA Data Central -Using and navigating Data Central to access tools and educational content</li> <li>3. FSSA Data and Analytics Cognos Portal - Using and navigating the Cognos Portal and its contents</li> <li>4. Informatica Metadata Manager – Users will be taught how to use Informatica Metadata Manager to review and look up data element definitions used in current reports.</li> </ol> <p>All concepts will have demonstrations and required hands-on exercises.</p>	<p>All FSSA Users, Business Analysts, Data Managers</p> <p>Prerequisite: None</p>

Training Course(s)	Description	Audience
Cognos Analytics: Report Studio	<p>This course is a full day (9-3). This course will require users to participate in hands-on activities.</p> <p>Cognos Analytics allows business users to create customized ad-hoc reports. This is the basic ad-hoc reporting tool for the EDW and maintains the user-friendly drag and drop method to create on demand reports that the legacy tool, Cognos Query Studio did. Users will learn how to access the for querying and reporting. The user will be given instruction on the structure and proper use of the EDW data including:</p> <ul style="list-style-type: none"> <li>• Create new reports</li> <li>• Filter and Sort data</li> <li>• Group and Section data</li> <li>• Create Pivot tables and Charts <ul style="list-style-type: none"> <li>• Format Reports</li> </ul> </li> </ul> <p>All concepts will have demonstrations and required hands-on exercises using the EDW. Trainees will have access to ample documentation both in class and available on FSSA Data Central.</p>	<p>Casual Users, Business Analysts, Power Users, Data Managers</p> <p>Prerequisites: Introduction to EDW:</p> <ul style="list-style-type: none"> <li>• Introduction to the Enterprise Data Warehouse (EDW)</li> <li>• FSSA Data Central Overview</li> <li>• FSSA Data and Analytics Cognos Portal</li> </ul> <p>Informatica Metadata Manager</p>

Training Course(s)	Description	Audience
Teradata SQL Assistant	<p>This is a 1-day course (9-3). This course will require users to participate in hands-on activities.</p> <p>This training will introduce users to basic Structured Query Language (SQL) instruction which will enable them to write their own queries against the FSSA's Enterprise Data Warehouse (EDW).</p> <p>Attendees will be given introductory syntax regarding the rudimentary constructs needed to produce a valid request to the server. The trainees will also be given advanced SQL instruction in the creation and manipulation of individual User tables, external data manipulation and other complex actions.</p> <p>All concepts will have demonstrations and required hands-on exercises using the EDW.</p>	<p>Casual Users, Business Analysts, Power Users, Data Managers</p> <p>Prerequisites: Introduction to EDW:</p> <ul style="list-style-type: none"> <li>• Introduction to the Enterprise Data Warehouse (EDW)</li> <li>• FSSA Data Central Overview</li> <li>• FSSA Data and Analytics Cognos Portal</li> </ul> <p>Informatica Metadata Manager</p>



Training Course(s)	Description	Audience
Introduction to Optum Performance Analytics for Health and Human Services (OPA)	<p>OPA for HHS is an enterprise analytic platform. There are 44 pre-defined reports available in OPA for HHS. Reports offer synchronized data visualizations—such as charts, graphs and tables—that help users explore their data set. The reports' dynamic presentation is where users reap the benefits of what OPA for HHS has to offer. This course is an introduction to OPA and navigating the tool.</p> <p>All concepts will have demonstrations and required hands-on exercises using OPA. Trainees will have access to ample documentation both in class and available on Data Central.</p>	<p>All business users that work with Medicaid data.</p> <p>Prerequisites: None</p>
OPA Reports: Monthly Working Session	<p>This session will be a hands-on session of specific reports (TBD), the accompanying Quick Reference Guides (QRGs), and using the reports to answer business questions. Users will execute instructor led business scenarios. This course is the progression of OPA courses and is an opportunity to see and use the OPA reports in real business scenarios.</p> <p>All concepts will have demonstrations and required hands-on exercises using OPA. Trainees will have access to ample documentation both in class and available on in Data Central.</p>	<p>All business users in the FSSA agency</p> <p>Prerequisites: None</p>
FSSA Data Enrichment Series	<p>This course offering is monthly sessions that consist of a guest speaker on a specific topic that business users have expressed interest in knowing more about. This is everything from Tableau, Program Evaluations and the PHE, as just a</p>	<p>All business users in the FSSA agency</p> <p>Prerequisites: None</p>

	few examples. These sessions are applicable for any FSSA user.	
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## 4. Attendance Projections

### 4.1. Class Attendance Projections

Class	Classes Offered	Anticipated Attendees per Class
Query Studio	6	12
Report Studio	6	12
SQL Assistant	6	12

## 5. Proposed Training Schedule

The Training Plan timeline provides scheduled dates for all classes in a year. The dates may be manipulated due to availability of attendees, resources, or any other circumstance as seen fit by the FSSA and OMPP. All classes begin at 9am and end at 4pm with a lunch break from 12 noon to 1 pm and two fifteen minutes breaks in the morning and afternoon. Below is a schedule of training classes offered every month.

~ January ~				
Mon	Tue	Wed	Thu	Fri
8	9	10 Query Studio I 9-12. 1-4	11 Query Studio II 9-12. 1-4	12
15	16	17 SQL Assistant 9-12, 1-4	18	19
22	23	24 Report Studio I 9-12, 1-4	25 Report Studio II 9-12, 1-4	26

~ March ~				
Mon	Tue	Wed	Thu	Fri
<b>4</b>	<b>5</b>	<b>6</b> Query Studio I 9-12. 1-4	<b>7</b> Query Studio II 9-12. 1-4	<b>8</b>
<b>11</b>	<b>12</b>	<b>13</b> SQL Assistant 9-12, 1-4	<b>14</b>	<b>15</b>
<b>18</b>	<b>19</b>	<b>20</b> Report Studio I 9-12. 1-4	<b>21</b> Report Studio II 9-12. 1-4	<b>22</b>
<b>25</b>	<b>26</b>	<b>27</b> Symmetry 9-12. 1-4	<b>28</b>	<b>29</b>

~ May ~				
Mon	Tue	Wed	Thu	Fri
		<b>1</b> Query Studio I 9-12. 1-4	<b>2</b> Query Studio II 9-12. 1-4	<b>3</b>
<b>6</b>	<b>7</b>	<b>8</b> SQL Assistant 9-12. 1-4	<b>9</b>	<b>10</b>
<b>13</b>	<b>14</b>	<b>15</b> Report Studio I 9-12. 1-4	<b>16</b> Report Studio II 9-12. 1-4	<b>17</b>

~ July ~				
Mon	Tue	Wed	Thu	Fri
8	8	10 Query Studio I 9-12. 1-4	11 Query Studio II 9-12. 1-4	12
15	16	17 SQL Assistant 9-12. 1-4	18	19
22	23	24 Report Studio I 9-12. 1-4	25 Report Studio II 9-12. 1-4	26

~ September ~				
Mon	Tue	Wed	Thu	Fri
2	3	4 Query Studio I 9-12. 1-4	5 Query Studio II 9-12. 1-4	6
9	10	11 SQL Assistant 9-12. 1-4	12	13
16	17	18 Report Studio I 9-12. 1-4	19 Report Studio II 9-12. 1-4	20

~ November ~				
Mon	Tue	Wed	Thu	Fri
		30 Query Studio I 9-12. 1-4	31 Query Studio II 9-12. 1-4	1

~ November ~				
Mon	Tue	Wed	Thu	Fri
4	5	6 SQL Assistant 9-12. 1-4	7	8
11	12	13 Report Studio I 9-12. 1-4	14 Report Studio II 9-12. 1-4	15

Additional EDW training classes may be scheduled depending on demand. If all designated users cannot be accommodated by the training sessions listed above, more training schedules will be added. In addition, individual Helpdesk assistance may be arranged.

## 6. Proposed Training Registration Checklist

Task	Due	Assigned To	Notes
Publish current and upcoming six-month training schedule with a description of each class and the required prerequisites.	Monthly	Optum	Optum Training lead will meet with designated FSSA staff and determine course offerings for the upcoming quarter prior to publishing schedule.
Users contact FSSA via the FSSA Helpdesk email. request attendance to class and submit forms.  • <b>Note:</b> Users complete Access Request form with manager approval and submit to FSSA 2.5 weeks prior. If submitted after 2.5 weeks, the request must be approved by OPTUM and FSSA/OMPP Management.	2.5 weeks prior	Users	Training Group tracks the registration process internally.

Task	Due	Assigned To	Notes
<ul style="list-style-type: none"> <li><b>Note:</b> FSSA tracks interested users and determines need for additional classes.</li> </ul>			
FSSA/OMPP approves the user forms and returns to OPTUM.	2 weeks prior	FSSA	FSSA will sign forms and fax back to OPTUM.
Email System Admin the approved users to setup EDW, SAS and/or Teradata accounts.	5 days prior	OPTUM	Sent by Training Group email.
User accounts created in the EDW system.	2 days prior	OPTUM	Task completed by OPTUM System Admin.
Users attend training class	Day of Training	Users	Attendance confirmed on sign-in sheet.