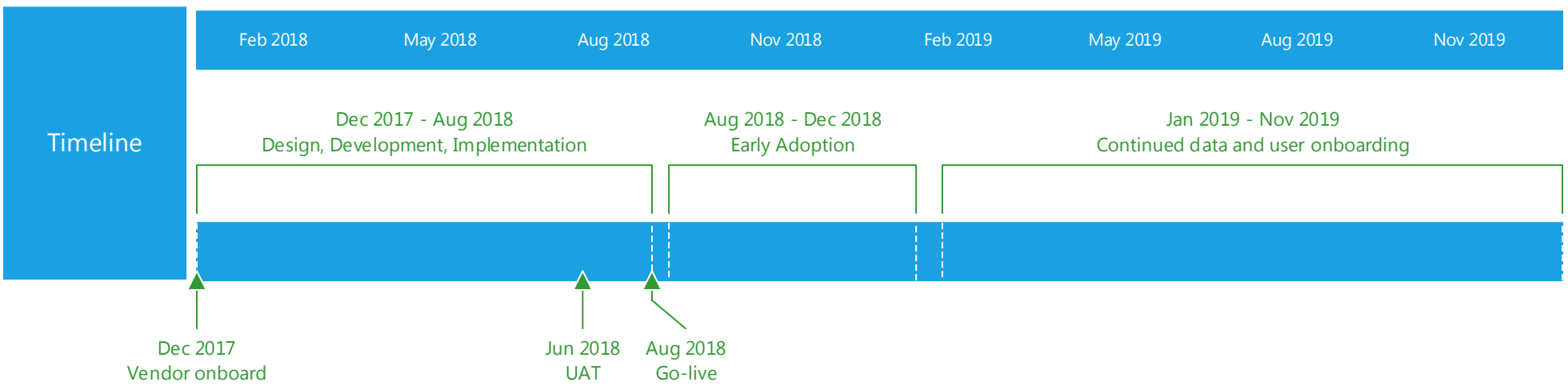
Provider Directory Process Activities (Draft)



Stakeholder Activities

- Convene PD stakeholder Groups
- Analyze/draft adoption tiers/targets/audiences
- Convene User Groups
- Identify Champions/Create Toolkit
- Develop success stories

Communications

- Develop/update communications tools – fact sheets, FAQs, website, newsletter articles, brochures/flyers
- Broad communications activities – conferences, webinars, newsletters, stories
- Branding Content
- Targeted phase 1 activities
- Targeted activities for future stages

Market Analysis

- Analysis for non-Medicaid use/fee models
- Draft/Finalize benefits documentation
- ROI
- Non-Medicaid Use

Data Source Integration

- OHA interviews with data sources
- Finalize onboarding plan for data sources
- Test and onboard Tier 1 data sources
- Onboard Tier 2 Data Sources
- Onboard Next Tier Data Sources

User Testing

- Prepare UAT Test Plan
- Prepare UAT Test Cases
- UAT

Data Access

- Analyze role based access policies
- Draft/Implement role based security polices

Data Quality and Stewardship Services

- Analyze/define data quality scoring metric
- Draft and finalize data stewardship plan
- Implement data stewardship and data governance process

Operations and Program Governance

- Operations/program Governance plan
- Training and training materials
- User Onboarding

Policies and Legal

- Develop Legal Agreements including data source, organization participation, and user agreements

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		Description
Stakeholder Activities	Convene Stakeholder Groups	The Provider Directory Advisory Committee (PDAC) and Provider Directory Subject Matter Expert Workgroup (PD-SME) are comprised of diverse health care professionals with backgrounds in provider data or directories and inform and guide the development of the Statewide Provider Directory. PDAC focuses on strategy and approaches. PD-SME focuses on ensuring the Statewide Provider Directory is useful for the users. Each group meets bi-monthly.
	Convene User Groups	User groups will be comprised of Statewide Provider directory users and OHA who meet and share their experiences, seek assistance from fellow users, propose ways to improve usability. Group may be an extension of the PD-SME or an entirely new group.
	Analyze Draft Adoption tiers/targets/audiences	Use PDAC and PD-SMEs to identify user adoption tiers and targets, outlining who will adopt and when based on the Provider Directory data sources and use cases.
	Identify Champions and create Toolkit	Find PD Champions (key supporters), create communications tools such as brochures, flyers, FAQs, standard presentations, for them to use as they talk to peer groups and other interested parties
	Develop Success Stories	Solicit users who have experienced value and benefits after implementing the Provider Directory and can share how it impacted their organization, themselves, or their patients. Use information in promotional materials and presentations
Develop Communication Materials	Broad communications activities	Analyze and finalize content and schedule for national and state conferences, program webinars/office hours, newsletter stories and articles through the Office of Health IT, OHA, and partner organizations.
	Targeted phase 1 activities	Communicate to targeted groups via scheduled webinars and conference calls, update website and training materials specific to this group.
	Develop Communication tools and webpage	Communication materials use marketing media to raise awareness and solicit participation in the Statewide Provider Directory. Materials will include: FAQs and fact sheets, brochures, flyers, newsletter content/stories, and targeted talking points; may include logos. Website content to include: overview of program, FAQs and fact sheets, events, stakeholder meetings, and resources. http://www.oregon.gov/oha/HPA/OHIT/Pages/PD-Overview.aspx
Market Analysis	Non-Medicaid Use & Buy In	Once the Medicaid user enterprise scope is known, scan who is interested in using the Provider Directory and analyze associated fees; non-Medicaid use and fees must be approved by CMS. Will include ROI and benefits.
Data Source Integration	Onboarding Plan and Processes	An onboarding plan and processes for how OHA and MiHIN work with data sources, a schedule for when data sources will be onboarded, how data sources are tested and then onboarded, and what information is needed.
User Testing	User Acceptance Testing	Solicit participation from PDAC/SME/Others who can test the provider directory. User testing includes development of the test plan, test cases, logistics, training, and testing.
Data Access	Role Based Access	Analyze and finalize who can access the Provider Directory and how. Activities include developing a a set of policies for users who view data and for those who may enter data, their permissions - add, edit, "delete"; also includes which data fields require PD to be the original source of information (e.g., "accepting new patients"), frequency of updates, and other functionality necessary
Data Quality & Stewardship Services	Data Quality Scoring Metric, Stewardship, and data governance services	Analyze how data quality metric for gold records will be displayed. Includes Data Stewardship plan and data governance processes (business rules for data scrubbing, matching, scoring, outliers, establishing survivorship rules for the data, and audits of the data)
Operations & Program Governance	Preparing for Operations	Preparing for operations will include developing an Operations Plan, training and training materials, and how program will be governed by OHA.
	User Onboarding	Users will be onboarded to the Provider Directory. Onboarding involves signing agreements and gaining access to OneHealthPOrt and the Provider Directory.
Policies & Legal	Develop Legal Agreements	Contracts for acceptable uses of the provider directory data between OHA and the data contributors as well as OHA and the participants/users.