Anticipating Data Needs and Opportunities

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Purpose

This tool will help guide your team through a discussion related to data needs and opportunities for your Learning Collaborative initiative. The tool will walk you through two early considerations around working with partners, then will walk you through five step-by-step action items to help you identify your data needs and opportunities. You may find yourself returning to this tool multiple times during this project as your progress in your data identification and analysis efforts. The end goal of this tool is to generate some specific next steps for your work, questions or sticking points, and any requests you have for technical assistance or other support.

Directions:

- Review the “Working with Partners” section and discuss how the team will approach these opportunities throughout the course of the initiative.
- Review the “Data Action Items” section and document questions your group cannot answer at this time, tasks that need to be complete, and technical assistance needs that may arise.
- Complete the “Next Steps” table at the end of this tool.

Working with Partners

This section explores key opportunities to strengthen partnerships when collecting, analyzing, and using data to support your initiative.

Partner with individuals with Medicaid and community stakeholders to interpret disparities data

- What approaches will your team use to identify member and community partnerships in data collection and interpretation?

Work towards consensus in using and understanding data

- What are the different motivations for each stakeholder group (i.e., state Medicaid agency, healthcare provider organization, managed care organization, community-based organization, individuals with Medicaid) to collect, understand, and learn about health disparities data? What questions will they have?
- Will assistance or supports be provided to understand the context and meaning of the data?

- What are each organization's goals and objectives for sharing the data with each stakeholder group (e.g., information sharing, decision making, requests for analysis/interpretation)?
  - What will you need to do to ensure your goals are met?
  - How will you know that you have succeeded?
  - When will you share the data?
  - How will you share the data?
  - What security or privacy concerns should be addressed (e.g., HIPAA, state regulations, proprietary information)?
  - What are the decisions that need to be made once all parties have the data?

Data Action Items

This section explores five step-by-step action items teams will need to address in order to successfully work with data to support their initiative. The action items will help teams anticipate their data needs and potential challenges, and develop a plan for identifying, validating, and analyzing data.

Data Action Item #1: Data identification

- Has your team finished fully exploring available data sources and decided upon the health condition disparities and populations of focus for your AHE project?
  - If no, proceed to the next questions in this Action Item.
  - If yes, proceed to Data Action Item #2.
- List the data sources that you will use/are using to help you decide which disparities-focused health conditions and member populations to focus upon for the Learning Collaborative.
  - Does your team need help identifying potential data sources?
    - If yes, do you have a plan for getting the help you need to identify them?
- Do all the team members agree on the best data sources to explore?
  - If no – what are the options or preferences being discussed? What are the pros and cons of each option? What are the next steps the team will take to reach agreement?

Data Action Item #2: Review of initial data

It is common for individuals and organizations to conduct an initial review and analysis of available data and identify one or more disparities, only to later conduct more in-depth and detailed analyses (e.g., with a more complete data set, a longer time frame for the data window, a different approach to the analysis, data validation in partnership with members and communities) and

Understand how the data were first collected and recorded

Information technology personnel (e.g., data programmers), quality improvement personnel, and front-line personnel who collect and enter data (e.g., medical assistances, nurses, lab techs, clinicians, health plan claims database managers) should meet together to discuss their understanding of what the data will be used for (i.e., how it should be interpreted) as well as completeness and quality of the data.

It is common for these stakeholders to have different understandings of exactly what data is entered into the database/EHR; who enters it (and who is not entering it, but should); when, where, and how it is entered; the quality of the data; and how it is meant to be used and interpreted. For example, front-line health care delivery personnel can often quickly identify errors or misconceptions held by quality improvement or IT experts regarding how data is actually used (versus how the system was initially designed). When these groups work directly together, they can increase the chances that data is interpreted and understood correctly.

Teams can better understand their data during initial data review by answering the following questions:

- Which individuals from your team should be involved in these types of meetings/discussions?
- What is the timeline for them to complete this task?

discover that the data now tell a different story and/or uncover concerning data quality or completeness problems.

- Are there new or different data sources that you need to access in order to verify the existence (or extent) or the health care process and/or outcome disparities for your priority health condition(s) and member population(s)?
  - If you team does not need to access new or different data sources, how confident are you in the preliminary analyses? Is a more in-depth analysis of the data necessary to ensure its quality and completeness?
- Who will assess/has assessed the completeness and quality of the data?
  - What criteria will/did they use to make their assessment?

Data Action Item #3: Earning buy-in from key individuals who manage the data

- Whose buy-in is needed to access the necessary data? If you cannot identify specific individuals, what is the specific position, type of position, or type of expertise needed?
  - What are the steps or actions necessary to earn their buy-in?
  - What is your estimated time frame for earning the necessary buy-in?

Data Consideration #4: Data sharing across team partners

- Once you have the necessary permissions to access data, are additional permissions necessary to share it with the organizations and individuals on your team, other stakeholders involved in assessing the data quality and accuracy, and individuals with Medicaid partnering with you on this project?
  - Will the data be deidentified to all participants? Will anyone have access to individual-level, identifiable data?
  - Who provides the permission to share the data?
  - What is the process for obtaining permission?
    - Are there specific request forms that need to be completed? If so, who completes them?
  - What is the typical timeline for obtaining permissions?

Data Consideration #5: Development of the data analysis plan

- If you need to extract data from one or more databases, when will your team make its first data pull (or pulls, if multiple are required)?
  - What are the date ranges for the data pull?
  - Do you know how much of the data will be needed to verify the data quality and accuracy? If you do not know, who can you ask?
  - How will data from different sources be combined? By whom?
- What statistical analyses are necessary to verify that the disparities are present in the priority health conditions and member populations?
  - Is a statistician a necessary team member?
- Who will run the necessary analyses of the data and generate the reports?
- Who provides permission or approves the work to complete the analysis?
  - What is the process for obtaining their permission?
  - What is the typical timeline for obtaining their permission?
  - In what format do you want the analysts to share their analysis with your team?

- Will different partners and stakeholder groups need to see data in different formats (e.g., accounting for level of expertise/comfort with data and statistics)?
- How will data be shared with the team to monitor progress and success?

Next Steps and Timeline

Based on the answers to the questions above, list the next high-priority tasks that your team needs to complete, a target data for completion of each task, and the person/people responsible.

Next Steps		
Task	**Target Completion Date**	**Person Responsible**

Advancing Health Equity: Leading Care, Payment, and Systems Transformation (AHE) is a national program supported by the Robert Wood Johnson Foundation and based at the University of Chicago. AHE's mission is to discover best practices for advancing health equity by fostering payment reform and sustainable care models to eliminate health and healthcare inequities.