Introduction

Tuesday, November 29, 2022 1:55 PM

OpenAir New: https://authgateway3.entiam.uhg.com/idp/startSSO.ping?PartnerSpId=https%3A%2F%2Fauth.openair.com%2Fsso%2Fmetadata%2Fnop 1Jcf7 hGQ RJgXyBFw

PADU List: https://tl.uhg.com/
https://techpadu.uhg.com/
https://techlandscape.uhg.com/
https://architecture.uhg.com/docs/app-padu.html

Scott Johnson Rally board: https://rally1.rallydev.com/#/321928643192d/teamboard

New Rally: SSO URL, 1_Rally Template User Stories › My Dashboard | Rally (rallydev.com)

Products and service preferred/acceptable for the Optum development teams: https://new-wiki.optum.com/pages/viewpage.action?pageId=201882353
Rally
Deployment Jobs & Dependencies - Data Analytics & Clinical Performance (DACP) - Confluence (optum.com)
++
https://techlandscape.uhg.com/
++
Deal approval link: https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx
AIDE IDs: https://aide.optum.com/
++

SNOWFLAKE LOGIN URLs:

https://uhg_optumcare.east-us-2.azure.snowflakecomputing.com/console

Account name: <**uhg_optumcare.east-us-2.azure.snowflakecomputing.com**>
User name: <**ocadmin_adfdev@optum.com**>
Password: <**z3q6bbWW**> Old Password: <BAJgJ4D**>**
Role: <**AR_DEV_OCADMIN_ADFDEV_OPTUM_ROLE>**
Database: <**OCDP_DEV_OPTUMCARE_DB>**
Warehouse: <**OCDP_DEV_QUERY_WH>**
Schema: <**OC_WORK>**
Table: <**movies>**
++
CareData Platform documents on **SharePoint (Internal)**: https://uhgazure.sharepoint.com/:f:/r/teams/CareDataPlatform/Shared%20Documents/Architecture?csf=1&web=1&e=4JBQ4Y
All Encompassing: CareData Platform - Documents - All Documents (sharepoint.com)
CareData Platform **SharePoint (External)**: https://uhgazure.sharepoint.com/teams/OptumCareDataHub/Shared%20Documents/Forms/AllItems.aspx?id=%2Fteams%2FOptumCareDataHub%2FShared%20Documents%2FPlatform%20Architecture%26%20Technology&viewid=a6183ab5%2D84d6%2D4b7f%2D85cf%2Dcd6b90e47dcd

Also SharePoint (External): Optum CareData Hub - Documents - All Documents (sharepoint.com)
++
Leads Management: Leads Mgmt_022723.pptx
++
https://itps-sc.optum.com/itps

How to record a video: Record a Video with Snagit | Snagit | TechSmith

Cloud digital transformation is the process of **migrating** an organization's IT **infrastructure**, **applications**, and **data to the cloud**.

The following link has the latest templates for each and you should always start from the templates and not use an older docu ment.
- https://uhgazure.sharepoint.com/sites/consulting/staff/finops/Pipeline%20And%20Staffing/Forms/Pricing%20and%20Deal%20Review%2 0Templates.aspx?RootFolder=/sites/consulting/staff/finops/Pipeline%20And%20Staffing/Finance%20and%20Ops%20Reporting/Pricing%20and%20Deal%20Re view%20Templates
- SoW = Intersegment_Term_Sheet Template 20220523.xlsx

Pricing proforma = 2023 Consulting Pricing Template_12.13.22 - Updated 2023 Rates - Windows PCs.xlsm
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Cadence, in business-speak, is how often a regularly scheduled thing happens.
Cadence, a rhythmic sequence of routines, processes and systems that happen with varying frequency within a business
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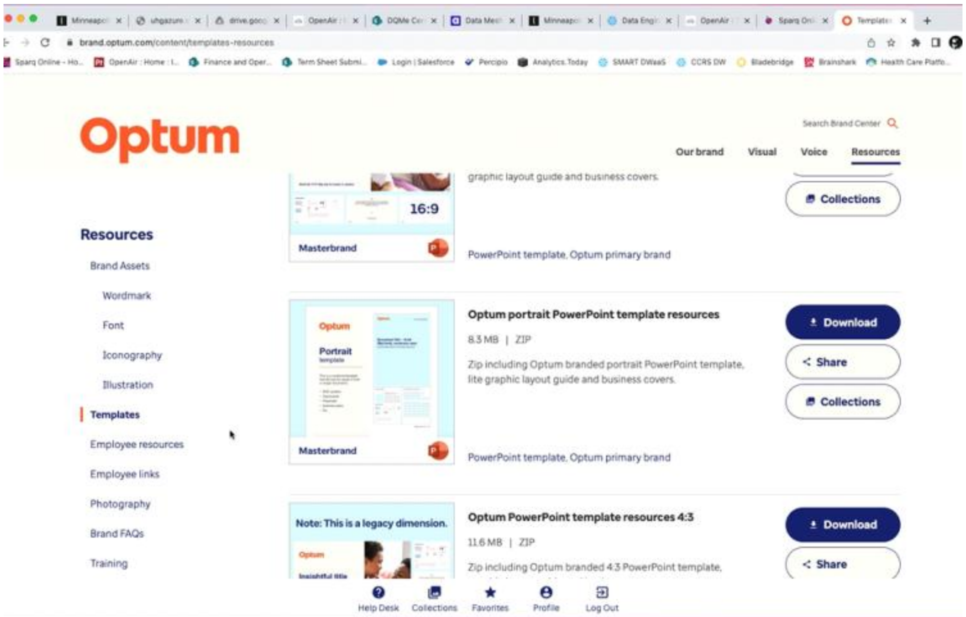

Optum Templates: https://brand.optum.com/

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@Shirley, Laura / @R S, Ragesh - can you please provide guidance to Dave Cheema to get engaged on the AEP training track with specific focus on the AEP data architecture and CDP?

Matt is shaping a large deal and had suggested to train team members to build a deep understanding of the AEP data architectu re to support these and other MarTech AEP / and other data initiatives.

+++

Ask from Dinesh on 08/16/2023
Subject: Utilization
Utilization excel sheet on the finance website
Check utilization every Tuesday, is it get accounted for?
https://uhgazure.sharepoint.com/sites/consulting/staff/finops/Pipeline%20And%20Staffing/Forms/Individual%20Performance%20Dash board.aspx?RootFolder=/sites/consulting/staff/finops/Pipeline%20And%20Staffing/Finance%20and%20Ops%20Reporting/Individual%20Performance% 20Dashboard
Take a screenshot and send it to Dinesh every Tuesday

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1. Update detail round 1
2. Set up a second cursor where recordcount > 1
3. If indicator1 == 'O':
       decision = 'KEEP 1 by paid_date desc and mark rest for DROP'
     elif indicator1 == 'M':
       decision = 'KEEP all positive, mark all 0 allowed_amt for DROP'
     elif indicator1 == 'S': #At least 1 negative, but not all

+++

3	33003282906	2018-11-13	1001201938		77063	26	3	3	M
4	33003282906	2018-11-13	1001201938		77067	26	3	3	M
5	33003282906	2018-11-13	1001406023	0403	77063		3	3	M
6	33003282906	2018-11-13	1001406023	0403	77067		3	3	M

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The Most Complete Guide to pySpark DataFrames | by Rahul Agarwal | Towards Data Science

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Azure Container App (managed Kubernetes)

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Link to CoPilot: Copilot | Microsoft 365 Copilot
For SOW submission use: GoDigitalfromHello <**godigitalfromhello@uhgazure.onmicrosoft.com**> distribution along with relevant recipients.

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MyGPS: https://eelf.fa.us2.oraclecloud.com/fscmUI/faces/deeplink?objType=NFX_ME_CAREER_AND_PERFORMANCE
Everyone For the Goal Entry, we are under "Payer Advisory Team"

Goal entry takes less than 10 minutes.

1. The first step is to reference the following instructions on Teams Create-Review-and-Assign-Goals.pdf.
2. Then navigate to the folder for your Business or Practice (Goal Entry Templates)
3. Download the appropriate goal template for your grade level and role. If you are unsure which profile applies to you, please reach out to your Practice Leader or People Leader.
4. Using copy and paste from the template, enter your goals into the MyGPS tool per the instructions. **Please do not modify or omit the goals in the template**. Additional personal goals may be entered at your and your manager's election.

2025 Optum Advisory MBOs.pdfOptumAdvisory2025MBOs > CommunicationsCreate-Review-and-Assign-Goals.pdfOptumAdvisory2025MBOs > Communications

Notes

Thursday, April 24, 2025 5:28 PM

ISA Agreement ID in the SoW (Term Sheet) for **New** opportunities should be **blank**
ISA Agreement ID in the SoW (Term Sheet) for **Renewal** opportunities should be **27105**
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Supplier Web: https://supplier.microsoft.com/App
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Burn Report:
Rescheduled_ Burn Report Training (Option 1)-20250501_130541-Meeting Recording.mp4

To generate Burn Report: https://app.powerbi.com/groups/me/apps/b4415176-fbcb-4037-a39c-5ce5aa8606d6/reports/caa7ef69-d315-4c0c-bf5c-dadf989f7551/ReportSection6e603d2325045753d163?ctid=db05faca-c82a-4b9d-b9c5-0f64b6755421&experience=power-bi
For support email: advisory_operations@optum.com
++
I have also added you to the Onboarding Buddy Teams folder, you can find the tip sheet in the files there on what an onboarding buddy does.
You will want to t**rack your Buddy time in OpenAir** using **Consulting Time 2023** under the project dropdown and +1 Activities (**Advisory Sponsored Initiatives**) as the task.
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Link to SDRP Teams Channel: Strategic Data Repository Platform | HCP Data Platform User Group | Microsoft Teams

Internal Opportunity Approval

Monday, January 6, 2025 1:40 PM

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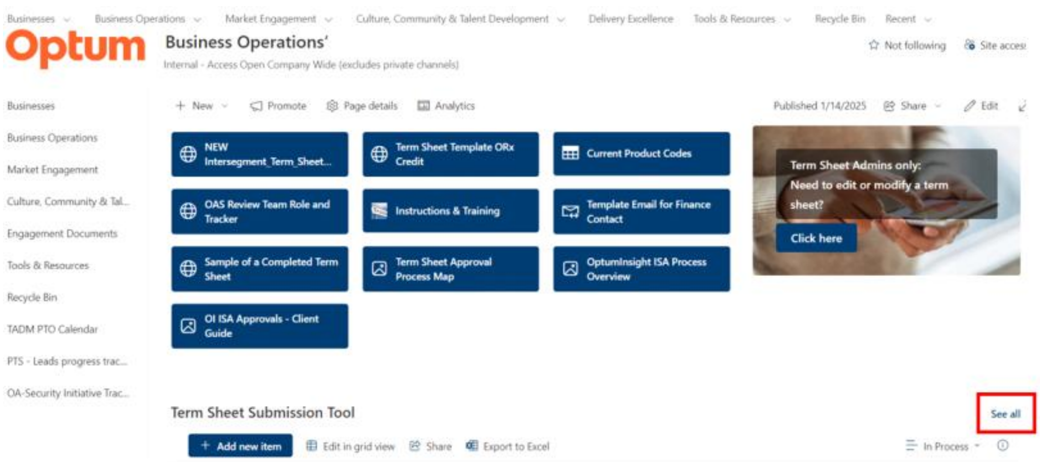
Cheat sheet for the Opportunity approval process:

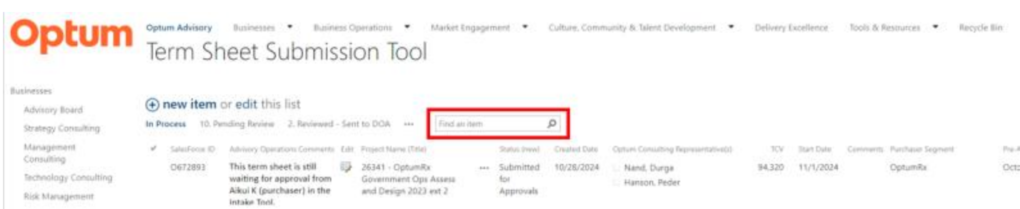
- Create a Proforma, review and get internal team consensus. The name should be in following format: *<year>* Consulting Pricing - *<Salesforce Opportunity ID> <Salesforce Opportunity Name>*
- Submit Proforma Summary along with the Proforma (Consulting Pricing) sheet to Matt for his approval
  - Submit pricing approval request to Matt and CC "GoDigitalfromHello" group. Attach the proforma sheet in the email.
  - Save Matt's Approved email
- Once Matt provides approval, submit a formal pricing approval request at the link below. Choose the "Pricing and Deal Review Submission" button under Links to complete form and submit.
  - https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx
  - **Note**: Opportunities over $1M will be reviewed by the Deal Review team. Once the Deal Review is approved, edit the existing submission to add the details for the Pricing Approval.
- Once Deal Review approval email is received: 1. save it; 2. Goto Salesforce and upload formal pricing approval email to the Opportunity
  - https://optumgrowth.my.salesforce.com/
  - Search for opportunity *<opportunity ID>* in Search bar
  - After clicking on opportunity to open, look in "Related List Quick Links" section on right side of page and click on "Show AI"
  - Click on "Files" link and upload email approval from Pricing portal

- Draft SoW for this opportunity
  - Download the latest template from Term Sheet SharePoint site
    - https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
    - Click on "NEW Intersegment_Term_Sheet…" button to download latest version of Term Sheet
  - Rename the term sheet to the following format: Intersegment Agreement - *<Salesforce Opportunity ID> <Salesforce Opportunity Name>*
  - Fill out new Term Sheet to create SoW
  - Be sure to complete "SOW" and "Business&Financial" tabs
- Review the SoW internally and with the client to ensure all accounting information is correct
- Send a formal SOW approval email titled "SOW Approval requested: *<Salesforce Opportunity Name>*" along with the Term Sheet to the client
- Upon receiving the approved email from the client, submit the SoW into the Term Sheet Submission Tool: https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
- Once you get the approval email from the Term Sheet team, continue with the subsequent steps

To search for a specific Term Sheet:



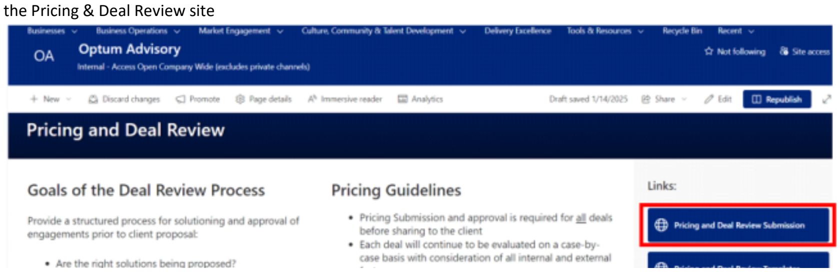
- Click on **See all** (at the bottom right of the image above)

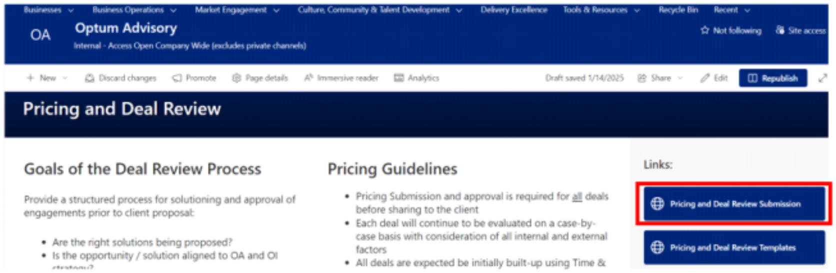


- Enter the Salesforce Opportunity ID in the search box (middle of the image above).
  - You'd be able to search term sheet for desired Opportunity

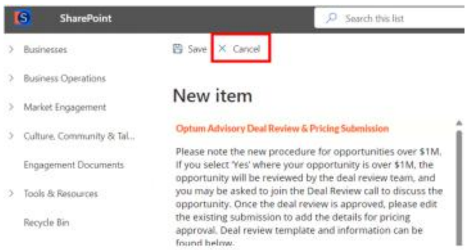
To search for a specific Pricing & Deal sheet

Go to the Pricing & Deal Review site

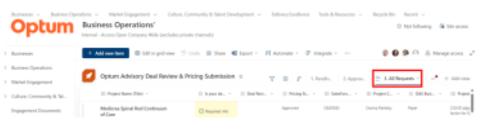




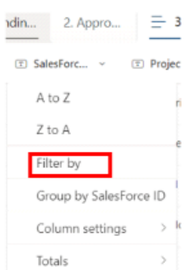
Click on Pricing and Deal Review Submission (circled in Red)



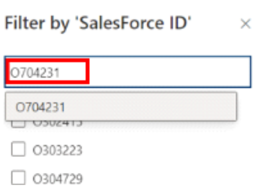
Click on Cancel (circled in Red)



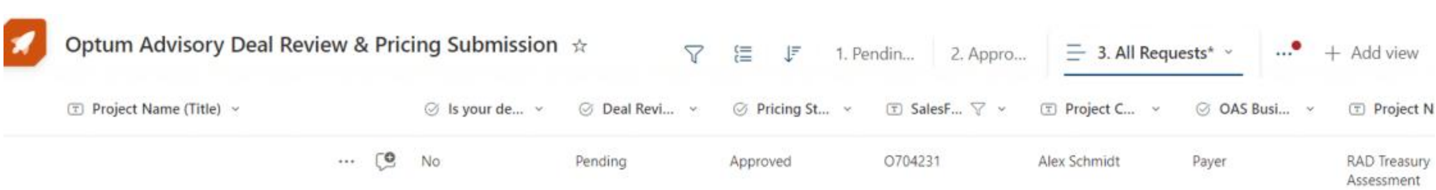
Click on **3. All Requests** (circled in Red)



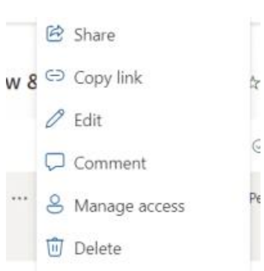
Click on **Filter by** and on the right side of the page a dialog will open up

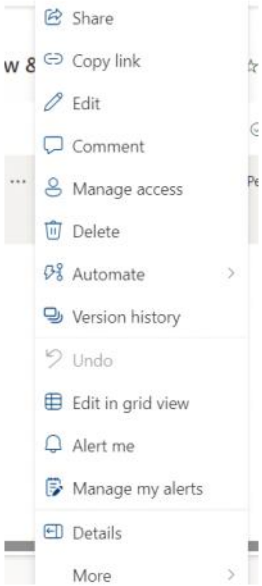


Enter the Salesforce opportunity ID and hit Enter key. **Apply** button, at the bottom of the dialog box will be enabled
Click on **Apply** button

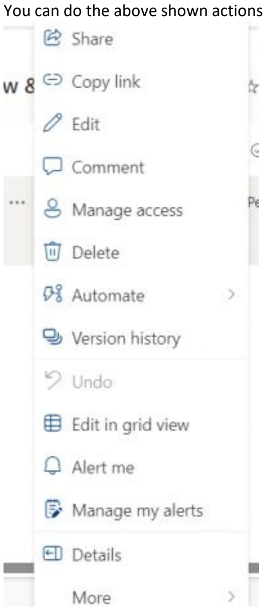


The selected Salesforce opportunity ID will be shown in the list
Click on ••• (three horizontal dots)





You can do the above shown actions to the selected Salesforce opportunity ID



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Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Reply | Reply All | Forward

Shin, John S
To Cheema, Dave
Thu 12/12/2024 9:34 AM

Retention Policy UHGInbox (90 days) Expires 3/12/2025

Start your reply all with: Thank you! | Got it, thanks! | Thanks for sharing! | Feedback

Click on "Show All" link to expand...

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

Optum

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From: Cheema, Dave <dave.cheema@optum.com>
Date: Thursday, December 12, 2024 at 9:31 AM
To: Shin, John S <john.shin@optum.com>
Subject: RE: Pricing for O695378-27105 - RAD Data Modernization Implementation

John,
I'm not seeing Files under "Related List Quick Links". Am I missing something? Please help. Thanks.
Regards,
Dave Cheema

John,

I'm not seeing Files under "Related List Quick Links". Am I missing something? Please help. Thanks.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Thursday, December 12, 2024 9:07 AM
To: Cheema, Dave <dave.cheema@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Hi Dave,

Sounds like you have completed the pricing approval steps as needed. Next steps are as follows:

- Goto SFGO and upload formal pricing approval email to Opportunity
  - https://optumgrowth.my.salesforce.com/
  - Search for opportunity O695378 in Search bar
  - After clicking on opportunity to open, look in "Related List Quick Links" section on right side of page
  - Click on "Files" link and upload email approval from Pricing portal
- Draft SoW for this opportunity
  - Download latest template from Term Sheet sharepoint site
    - https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
    - Click on "NEW Intersegment_Term_Sheet..." button to download latest version of Term Sheet
  - Use attached as reference and fill out new Term Sheet to create SoW
    - Need to complete "SOW" and "Business&Financial" tabs
- Schedule review with me before sharing with Dinesh for final review

Hope that helps

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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From: Cheema, Dave <dave.cheema@optum.com>
Date: Wednesday, December 11, 2024 at 11:53 PM
To: Shin, John S <john.shin@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: RE: Pricing for O695378-27105 - RAD Data Modernization Implementation

John,

I have already done all that – got re-approval from Matt for the 2nd time; got formal approval for the revised pricing model as well. Do I need to do that again for the third time? If yes, what will be the purpose of that? Thank you.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, December 11, 2024 10:05 PM
To: Cheema, Dave <dave.cheema@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

You need updated proforma to go through the same process of 1) getting approval from Matt and 2) submitting for formal pricing approval again.

Get Outlook for Android

Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

SJ Shin, John S
To Cheema, Dave
Reply | Reply All | Forward
Thu 12/12/2024 9:34 AM
Retention Policy UHGInbox (90 days) Expires 3/12/2025
Start your reply all with: Thank you! | Got it, thanks! | Thanks for sharing! | Feedback

Regards,
Dave Cheema

From: Optum Advisory Services SharePoint <consulting_sharepoint2013@optum.com>
Sent: Wednesday, December 11, 2024 8:29 PM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Pricing for O695378-27105 - RAD Data Modernization Implementation

The pricing for O695378-27105 - RAD Data Modernization Implementation has been Approved.

This email can be uploaded in Salesforce as confirmation of pricing approval.

Status: Approved
OAS Business Segment: Payer
Project Name: 27105 - RAD Data Modernization Implementation
Salesforce ID: O695378
Comments:

Please do not respond directly to this email but rather reach out to the following team contacts: Deal Review - Sarah Walsh and Pricing Review: Kyle Koziara.

Salesforce ID: O695378
Comments:

Please do not respond directly to this email but rather reach out to the following team contacts: Deal Review - Sarah Walsh and Pricing Review: Kyle Koziara.

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Please **submit pricing approval request to Matt and CC "GoDigitalfromHello"** group email for FYI to leads in DT. Use attached email as an example. Make sure to **attach the proforma sheet** in the email.

Once Matt provides approval, you need to **submit a formal pricing approval request** at the below link. Choose the "**Pricing and Deal Review Submission**" button under Links to complete form and submit.

- https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx

FYI: Deal Review - Sophie Mcmichael and Pricing Review: Kyle Koziara.
To review approval status: https://uhgazure.sharepoint.com/sites/OIAdvisory/Staff/Lists/Pricing%20Centralization/1%20Pending%20%20Pricing%20Updated.aspx

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From: Cheema, Dave <dave.cheema@optum.com>
Sent: Wednesday, December 11, 2024 6:27 PM
To: Matousek, Matthew M <matthew.matousek@optum.com>
Cc: GoDigitalfromHello <godigitalfromhello@uhgazure.onmicrosoft.com>
Subject: RE: Pricing Approval for O695378 RAD Data Modernization Solution Dev Test & Deploy

Matt,

Here is the revised version of attached Pricing Proforma is for the initial 9-month **Dev, Test & Deploy** phase of the **RAD Data Modernization program** that we are proposing with the UHG Corporate Data Services team led by Alex Schmidt. The Solution Dev, Test & Deploy phase is the second phase of a 3-phase roadmap we have presented to the client (Alex). This phase's pricing is based on the findings of this first phase.

Please review the **fixed-fee w/ 10% contingency** pricing and provide your approval as appropriate
The financials are as follows:

Project Salesforce Product Code	**Technology-Tech Digital Transformation**		
Deal Type	**Fixed Fee - Monthly**		
Total Revenue	**$ 725,000**		
Total Engagement Margin	**$ 200,304**		***28%***
Target EM - Resource Mix			***35%***
Target EM - Project TOW			***46%***
Estimated Travel		**$ -**	***0%***
Pass Through / Consulting Products		**$ -**	
All in Revenue		**$ 725,000**	***28%***
Estimated IOI		**$ 102,723**	***14%***

Thank you.
Regards,
Dave Cheema
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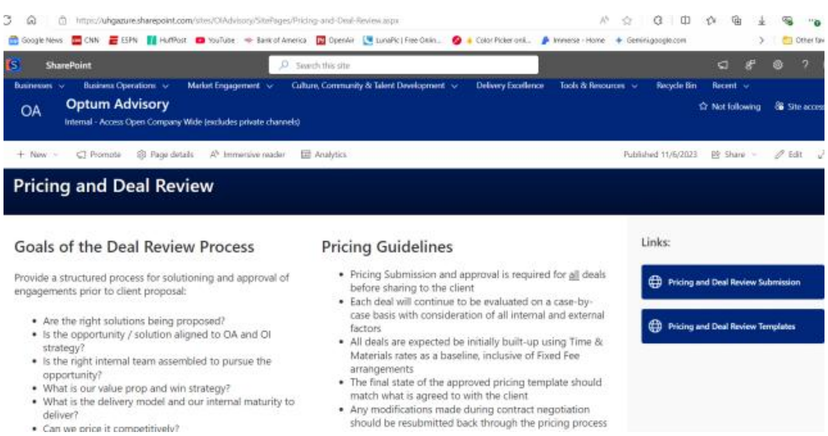
Deal Review team: Sarah Walsh and Kyle Koziara
https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx



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After Matt's approval do the following:

New item | Term Sheet Submission Tool

This is the term sheet upload form.

Term Sheet Submission Tool

And this is the general term sheet operations site.

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Supplier ID: 0009019797

- CMM Intake Form: CMM intake

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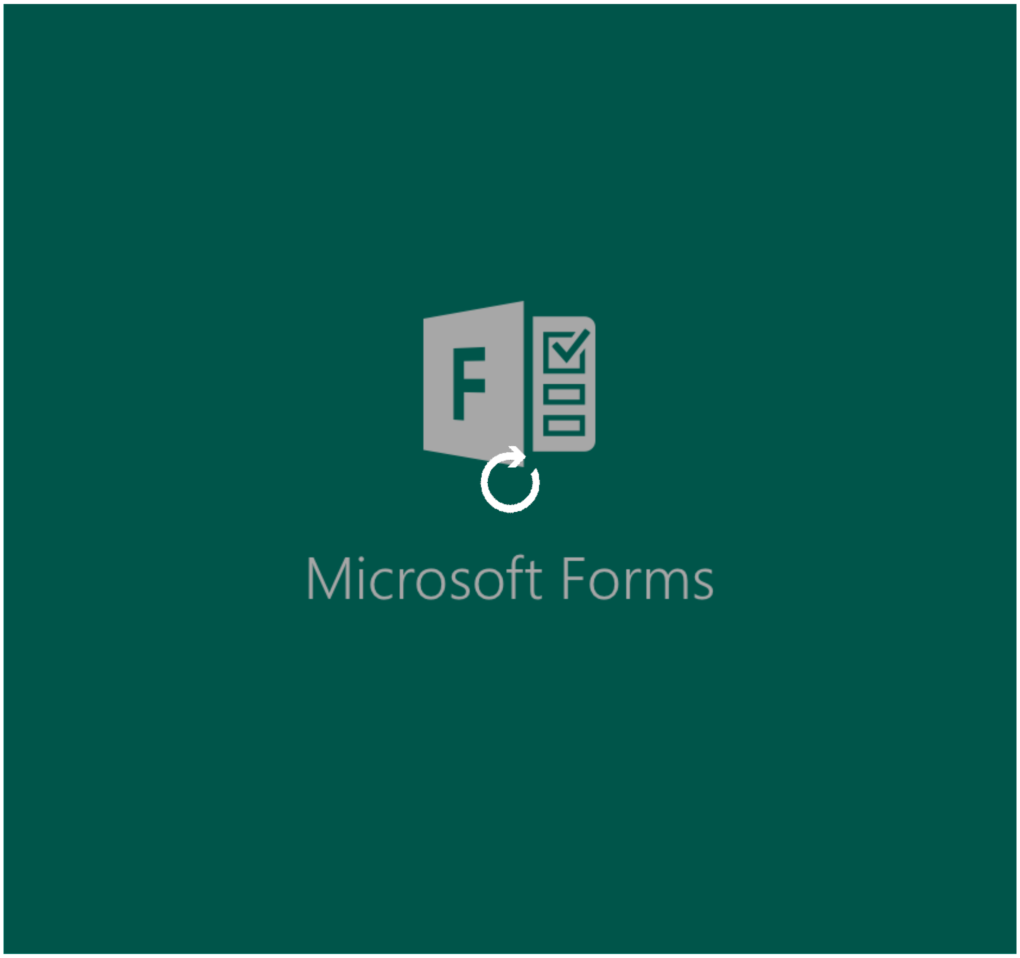
Supplier ID: 0009019797

- CMM Intake Form: [CMM intake]



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ECIF Portal: https://uhgazure.sharepoint.com/sites/EnterpriseCloud/SitePages/Microsoft-Azure-ECIF.aspx?csf=1&web=1&e=2nneXz&ovuser=db05faca-c82a-4b9d-b9c5-0f64b6755421%2cheather.ryder%40optum.com&OR=Teams-HL&CT=1730239825473&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yNDA5MTIyMTMxOCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3d%3d&CID=15c85ea1-209e-6000-cadc-9f158f08c571&cidOR=SPO
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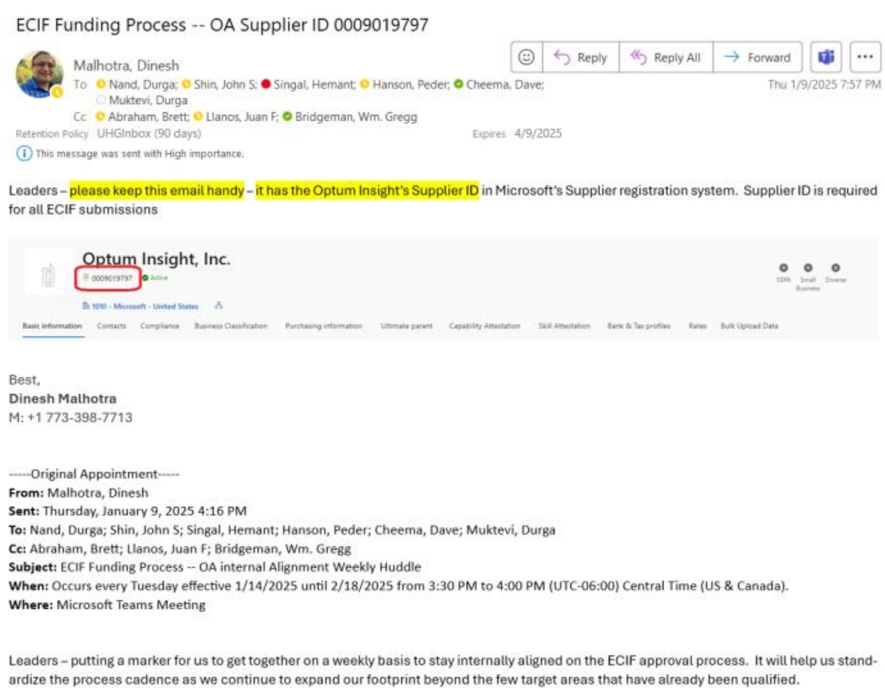

ECIF Funding Process -- OA Supplier ID 0009019797

Malhotra, Dinesh
To Nand, Durga; Shin, John S; Singal, Hemant; Hanson, Peder; Cheema, Dave; Muktevi, Durga
Cc Abraham, Brett; Llanos, Juan F; Bridgeman, Wm. Gregg
Thu 1/9/2025 7:57 PM
Retention Policy UHGInbox (90 days) Expires 4/9/2025
This message was sent with High importance.

Leaders – please keep this email handy – it has the Optum Insight's Supplier ID in Microsoft's Supplier registration system. Supplier ID is required for all ECIF submissions

Optum Insight, Inc.
0009019797 Active
1010 - Microsoft - United States
Basic information | Contacts | Compliance | Business Classification | Purchasing information | Ultimate parent | Capability Attestation | Skill Attestation | Bank & Tax profiles | Rates | Bulk Upload Data

Best,
Dinesh Malhotra
M: +1 773-398-7713

-----Original Appointment-----
From: Malhotra, Dinesh
Sent: Thursday, January 9, 2025 4:16 PM
To: Nand, Durga; Shin, John S; Singal, Hemant; Hanson, Peder; Cheema, Dave; Muktevi, Durga
Cc: Abraham, Brett; Llanos, Juan F; Bridgeman, Wm. Gregg
Subject: ECIF Funding Process -- OA internal Alignment Weekly Huddle
When: Occurs every Tuesday effective 1/14/2025 until 2/18/2025 from 3:30 PM to 4:00 PM (UTC-06:00) Central Time (US & Canada).
Where: Microsoft Teams Meeting

Leaders – putting a marker for us to get together on a weekly basis to stay internally aligned on the ECIF approval process. It will help us standardize the process cadence as we continue to expand our footprint beyond the few target areas that have already been qualified.

Where: Microsoft Teams Meeting

Leaders – putting a marker for us to get together on a weekly basis to stay internally aligned on the ECIF approval process. It will help us standardize the process cadence as we continue to expand our footprint beyond the few target areas that have already been qualified.

Ask from Everyone

- Keep this group cc'd on internal email communication on anything related to ECIF approval process to keep all of us on the same page.
- Send across topics for review to this group ahead of the weekly connect

Thank you!!!

From:	Nand, Durga
Sent:	Thursday, January 9, 2025 3:56 PM
To:	Malhotra, Dinesh; Cheema, Dave
Cc:	Muktevi, Durga; Abraham, Brett; Bridgeman, Wm. Gregg; Shin, John S; Singal, Hemant
Subject:	RE: Questions on ECIF worksheet

I agree with you that we need one meeting to align.

I think Dave Cheema and /or Rajesh Koneti should be setting up and managing this meeting / invitation series because they are more intimately involved.

Durga Nand | Optum

Technology Consulting, Optum Advisory

O +1 (952) 324-4007

From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Sent: Thursday, January 9, 2025 2:36 PM
To: Nand, Durga <durga.nand@optum.com>; Cheema, Dave <dave.cheema@optum.com>
Cc: Muktevi, Durga <durga_muktevi@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Shin, John S <john.shin@optum.com>; Singal, Hemant <hemant.singal@optum.com>
Subject: RE: Questions on ECIF worksheet

+ @Cheema, Dave he had the opening meeting with Microsoft yesterday to go through the SoW template

+ @Singal, Hemant he is navigating this space for UHC and would be helpful to keep him in the loop

Durga – I was planning to put a meeting on the calendar with this group – but am slammed hard. Peder can help us get together – and we should talk through all ECIF-related issues and address it with Jordan as one team.

We all are on the front-end and learning in real time to define the ECIF approval process. We can use a common cadence for us to get aligned internally and work with Jordan's team and Microsoft stakeholders.

Thoughts?

Best,

Dinesh Malhotra

M: +1 773 308 7713

ECIF Funding Process -- OA Supplier ID 0009019797

Malhotra, Dinesh

Reply | Reply All | Forward | ...

To Nand, Durga; Shin, John S; Singal, Hemant; Hanson, Peder; Cheema, Dave; Muktevi, Durga

Thu 1/9/2025 7:57 PM

Cc Abraham, Brett; Llanos, Juan F; Bridgeman, Wm. Gregg

Retention Policy UHGInbox (90 days) Expires 4/9/2025

This message was sent with High importance.

Subject: Questions on ECIF worksheet

Hi John and Dinesh,

As we prepare a ECIF request for CMM Pods and look at the template, there are lot of questions that have come to our group.

I am checking if we have completed any such request and if so can we get a walkthrough and also completed docs for reference. We have some time setup tomorrow and we can repurpose that call to look at these references.

Thanks

Durga

Get Outlook for iOS

Durga

Get Outlook for iOS

++
+++++++++++++++++++++

From: Shin, John S <john.shin@optum.com>
Sent: Thursday, December 12, 2024 9:07 AM
To: Cheema, Dave <dave.cheema@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Hi Dave,

Sounds like you have completed the pricing approval steps as needed. Next steps are as follows:

- Goto SFGO and upload formal pricing approval email to Opportunity
  - https://optumgrowth.my.salesforce.com/
  - Search for opportunity O695378 in Search bar
  - After clicking on opportunity to open, look in "Related List Quick Links" section on right side of page
  - Click on "Files" link and upload email approval from Pricing portal
- Draft SoW for this opportunity
  - Download latest template from Term Sheet sharepoint site
    - https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
    - Click on "NEW Intersegment_Term_Sheet…" button to download latest version of Term Sheet
  - Use attached as reference and fill out new Term Sheet to create SoW
    - Need to complete "SOW" and "Business&Financial" tabs
- Schedule review with me before sharing with Dinesh for final review

Hope that helps

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum
+++

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, January 8, 2025 3:51 PM
To: Alex Schmidt <alex_schmidt@uhg.com>
Cc: Cheema, Dave <dave.cheema@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>; GoDigitalfromHello <godigitalfromhello@uhgazure.onmicrosoft.com>
Subject: SOW Approval requested: RAD Data Modernization Implementation

RAD Data Modernization Implementation

SOW & Pricing Proposal

Hello Alex,

Thank you for choosing the Optum Advisory– Digital Transformation team to help support for your continued effort to modernize RAD Data Platform. Attached you will find the SOW & Pricing Proposal for this initiative. Please let me know if you have questions. I appreciate your trust in our team to support you.

Snapshot:

- Ask: **RAD Data Modernization Implementation**
- Duration: **1/13/2025 - 8/15/2025**
- Total Cost Estimate: **$725,000**

Next Steps:

1. **Review** the attached SOW for scope, pricing, terms, and conditions
2. If you agree with the terms, simply respond to this email with **"Reviewed and agree."**
3. You will receive an email notification from Optum's 'iTRAC Tool' for your **formal online approval** of this SoW
4. The **Finance team** member too need to provide their approval via 'Intake Tool'.
   Please confirm the name of your Finance Team member along with the GL string for billing.\
   a. GL String:

- BU: 20020
- OU: 01000
- Dept: 100505

a. GL String:

- BU: 20020
- OU: 01000
- Dept: 100505
- Location: USASS800

    a. Finance Contact: Ken Baxter | ken_s_baxter@uhc.com

OAS Digital Transformation Key Business and Technical Contacts:

- John Shin
- Dinesh Malhotra
- Dave Cheema

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

ECIF Funding

Saturday, January 18, 2025 1:39 PM

RAD ECIF SoW Documentation: [RAD ECIF SoW Documentation]()

++

ECIF Milestone Completion Sign-off Template

ECIF Milestone...

ECIF Milestone Completion Sign-off: Please Update & Respond

Reply | Reply All | Forward

Shin, John S
To Whitmer, Patrick
Cc Malhotra, Dinesh; Cheema, Dave
Retention Policy UHGInbox (90 days) Expires 6/12/2025

Fri 3/14/2025 3:23 PM

RAD Implementation - ECIF Milestone Completion Sign-off

Dear Patrick – Please complete the placeholders highlighted in blue to send it back as your approval / certification for the completion of the RAD Implementation Milestone per details below.

Microsoft Supplier Number: 3067563

Microsoft SoW ID: SOW_3067563_Optum Insight Inc_CAS-1737011-Q2V5H9_724702146

Microsoft PO #: Microsoft PO #: 101279849 - CAS-1737011-Q2V5H9 / BDI-C – United Health Group – FY25-26 (Optum Insight, Inc, $725,002.00)

Project Name: [Name of project as labeled in Microsoft ECIF SoW]

Milestone: 1 of 8

Milestone Invoice Amount: $102,859

Milestone Description:

Development & Unit Testing: • Migrate 20 API datasets from data source Mercury into Bronze and Silver layers of Medallion architecture. • WEBAPI, ADF, Azure Blob Storage, Custom Framework

Milestone Completion Date: March 15, 2025

Client Approval:

I, <<Client Name>>, Director, Business Analysis Services, UHG Corporate Finance, hereby acknowledge that the above-mentioned milestone has been completed and delivered to my satisfaction. By signing this document, I certify that the deliverable meets all the agreed-upon requirements and standards. I approve the above-mentioned milestone for invoicing to Microsoft.

Client Name: Patrick Whitmer

Client Title: Director, Business Analysis Services, UHG Corporate Finance

Client Company / LoB: UHG Corporate Finance

Client Email:

Client Signature:

Certification Date:

Thanks,

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7286
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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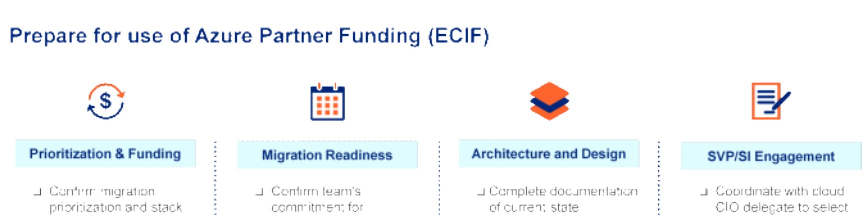
[Cloud Migration Modernization (CMM)]()

ECIF pre-submit review contact: Mitchell, Lawrence E <lawrence.mitchell@optum.com>

CMM Intake Form: [Microsoft Forms]()



Prepare for use of Azure Partner Funding (ECIF)

Prioritization & Funding

- Confirm migration prioritization and stack ranking with your cloud CIO delegate
- Confirm funding source(s) and need for Azure Partner Funding (ECIF)

Migration Readiness

- Confirm team's commitment for migration execution starting in year 2025
- Determine a start date and duration that aligns with engineering team's availability and update in TechOps HUB
- Validate migration timeframe with product management and roadmap

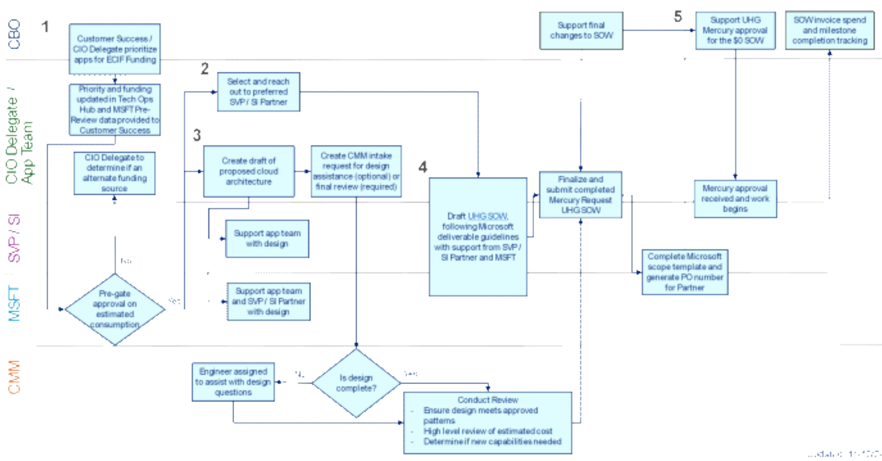
Architecture and Design

- Complete documentation of current state application architecture
- Create draft of proposed cloud architecture and labor migration estimate
- Confirm Microsoft Azure as cloud service provider
- Submit CMM intake for design assistance (optional) and/or final review (required)

SVP/SI Engagement

- Coordinate with cloud CIO delegate to select preferred SVP/SI
- Have SVP/SI draft the MSFT scope template which includes outcome-based milestones
- Create draft of SOW with SVP/SI partner (SOW Template for ECIF)
- Connect to designated MSFT contacts and send SOW

Azure Partner Funding (ECIF) End to End Process



Optum CMM Team: all ECIF requests from business MUST flow through this team, and they need architectural reviews with PADU, pattern alignment, etc.

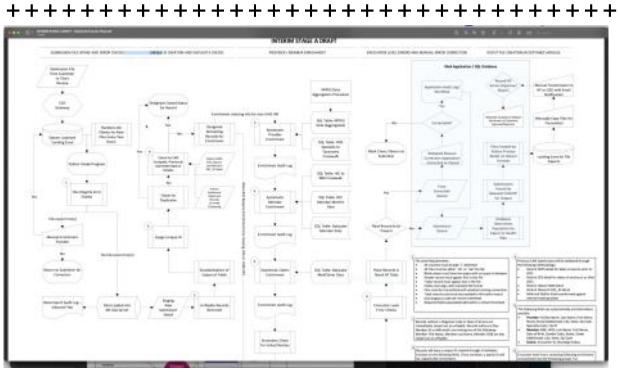
App SOW review / approve for readiness, meeting internal standards, etc.

Can we have a set of 'continuity' resources that help Optum CMM do the SOW readiness / technical 'fit' with Optum standards and fund this with ECIF?

Yes, with Microsoft ISD.

Optum CMM Team review - you need to schedule an Optum CMM Team review. They assess its technical and security fitment. They want to ensure that PADU approved components are used and proper security controls are implemented at the right places.

++



++

Re: ECIF process recommendations

Shin, John S
To Cheema, Dave; Llanos, Juan F; Bangale, Gaurav; Palla, Sandeep; Sharma, Mudit
Cc Malhotra, Dinesh
Retention Policy UHGInbox (90 days) Expires 6/5/2025

Reply | Reply All | Forward

Fri 3/7/2025 9:14 AM

Start your reply all with: Noted. Thank you. | Thank you! | Will do. | Feedback

Hi team. Please keep this as reference. You all may be involved in ECIF cloud migration opportunities.

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Date: Friday, March 7, 2025 at 8:43 AM
To: Nand, Durga <durga.nand@optum.com>, arundaniel@microsoft.com <arundaniel@microsoft.com>, Shin, John S <john.shin@optum.com>, Hanson, Peder <peder.hanson@optum.com>, cblomker@microsoft.com <cblomker@microsoft.com>
Subject: Re: ECIF process recommendations

Thank you Craig - good guidance.

+ @Shin, John S and @Hanson, Peder for awareness

Best,
Dinesh Malhotra
M: +1 773-398-7713

From: Craig Blomker <cblomker@microsoft.com>
Sent: Friday, March 7, 2025 8:41:18 AM
To: Nand, Durga <durga.nand@optum.com>; arundaniel@microsoft.com <arundaniel@microsoft.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: ECIF process recommendations

Caution: External email. Do not open attachments or click on links if you do not recognize the sender.

@Nand, Durga and @Malhotra, Dinesh –

Couple of suggestions for future, based on the XL ECIF request I sent earlier:

1. Once we know a project is headed for ECIF funding, request a "new" Excel template from Arun or I.
   a. Reason: there's a unique ID for each one embedded in the Excel file.
   b. If you "save as" an older one, Arun and I cannot upload it to our tooling – we have to copy/paste, bringing errors into play.
2. Resource details – hours and roles must be input into the "Milestone Details" tab. In the XL draft you sent, they were simply input into a 'comment' field.
   a. This is imperative to drive the back-end calculations based on rate cards, etc.
3. Beyond simply letting the MSFT back-end system calculate a total milestone cost based on the resource plan you submit, let us know what the desired total $$$ is per milestone.
   a. Arun and I can over-ride the calculated $$$, as long as the over-ride amount is LOWER than the calculated amount.
   b. We are finding that many projects are using a blend of on/offshore resources and other factors that result in the MSFT rate-card calculated milestone costs are HIGHER than what has been agreed to with customer teams.

Am working with CMM team to update documentation that addresses some of above for broader consumption.

However, much of my comments above are more for OAS-Microsoft interactions vs. impacting customer app teams.

Happy to discuss for clarity - Book time with Craig Blomker: 15 minute conversation with Craig Blomker

Take care,

Microsoft Azure

Craig Blomker
Azure Specialist
3601 West 76th Street | Suite 500 | Edina, MN 55435
cblomker@microsoft.com
office: 952.656.2234 mobile: 651.402.8639

Click here for options to Learn about using Azure.
Learn about reference architectures for numerous uses of Azure.

From: Nand, Durga <durga.nand@optum.com>
Sent: Thursday, March 6, 2025 9:20 PM
To: Arun Daniel <arundaniel@microsoft.com>; Craig Blomker <cblomker@microsoft.com>
Cc: Leisure, Rena D <rena.leisure@optum.com>; Dupree, Melicia <melicia.dupree@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Muktevi, Durga <durga_muktevi@optum.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>; Koslosky, Chris <chris.koslosky@optum.com>; O'Neil, Brian T <tim_oneil@optum.com>
Subject: [EXTERNAL] FW: XLCare Application documents for ECIF funding Hi Arun,

Adding Chris and Tim to the distro.

With Regards

Durga Nand | Optum
Technology Consulting, Optum Advisory
O +1 (952) 324-4007

From: Nand, Durga
Sent: Thursday, March 6, 2025 5:13 PM
To: Arun Daniel <arundaniel@microsoft.com>; cblomker@microsoft.com
Cc: Leisure, Rena D <rena.leisure@optum.com>; Dupree, Melicia <melicia.dupree@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Muktevi, Durga <durga_muktevi@optum.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: FW: XLCare Application documents for ECIF funding Hi Arun,

Arun, I am resending XLCare application documents (SOW) for ECIF funding request.Pl confirm receipt.

With Regards

Durga Nand | Optum
Technology Consulting, Optum Advisory
O +1 (952) 324-4007

From: Nand, Durga
Sent: Thursday, February 27, 2025 6:55 PM

O +1 (952) 324-4007

From: Nand, Durga
Sent: Thursday, February 27, 2025 6:55 PM
To: Arun Daniel <arundaniel@microsoft.com>
Cc: Leisure, Rena D <rena.leisure@optum.com>; Dupree, Melicia <melicia.dupree@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Muktevi, Durga <durga_muktevi@optum.com>
Subject: XLCare Application documents for ECIF funding Hi Arun,

Hi Arun,
Attached Pl find applicable documents for ECIF funding for XLCare application. Please let me know if you have any question or want me to schedule a quick discussion.
Thanks Rena and Melicia for such a great partnership.

With Regards

Durga Nand | Optum
Technology Consulting, Optum Advisory
O +1 (952) 324-4007

++

FW: Microsoft ECIF-funded UHG Opportunities: $0 SoW Governance Discussion / ECIF commercial component

SJ Shin, John S
To Palla, Sandeep; Llanos, Juan F; Cheema, Dave; Bangale, Gaurav; Sharma, Mudit; Kalidindi, Venkata; Tee, Vicky Hui Meng
Reply | Reply All | Forward | ...
Fri 4/11/2025 5:44 PM
Retention Policy UHGInbox (90 days) Expires 7/10/2025
Start your reply all with: Will do, thanks! | Thank you! | Thanks for sharing! | Feedback

FYI – keep this handy somewhere for future reference.

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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---

From: Badstibner, Emily L <BadstibE@Optum.com>
Date: Friday, April 11, 2025 at 11:01 AM
To: Hanson, Peder <peder.hanson@optum.com>, Malhotra, Dinesh <dinesh.malhotra@optum.com>, Shin, John S <john.shin@optum.com>, Thompson, Brian <brian.thompson92@optum.com>, Nand, Durga <durga.nand@optum.com>, Abraham, Brett <brett_abraham@optum.com>, Johnson, Scott D <scott.d.johnson@optum.com>
Cc: Gabor, Ferenc <ferenc.gabor@optum.com>, Thomason, Constance T <constance.thomason@optum.com>, Zarozny, Sheryl <sheryl.zarozny@optum.com>, Linnander, Robert M <LinnandR@Optum.com>, Swanson, Robert H <robert.swanson@optum.com>, Moeller, Scott L <scott.moeller@optum.com>, Matousek, Matthew M <matthew.matousek@optum.com>, Mcmichael, Sophie B <mcmichaels@optum.com>, Koziara, Kyle <kyle.koziara@optum.com>, Welter, Brett <brett.welter@optum.com>
Subject: RE: Microsoft ECIF-funded UHG Opportunities: $0 SoW Governance Discussion / ECIF commercial component

Dinesh & team – I have outlined how the entries should be setup in Salesforce for both the commercial and U-Channel ECIF funded opportunities.

I know we have time on Monday, so happy to talk through then as well.

Thanks,
Emily

Commercial Opp
-A standard commercial opportunity needs to be created inclusive of:
- Use naming convention as outlined below by the practice
- Full TCV of contract
- Attach Microsoft contract & automated pricing approval
- OpenAir project needs to be generated for time (must populate Bill To and Ship To contacts to do this)
- Channel = Direct
- Opportunity Type = If it's a new SOW, it should be New Business (NB). If there are cases where it is not a new SOW or new product schedule, it should be New Business Existing Account (NBEA)

U-Channel Opp
-A standard U-channel opportunity needs to be created inclusive of:
- Use naming convention as outlined below by the practice
- TCV = $1
- Requires $1 DOA term sheet – to be submitted through Bob Clement's process in order for expenses to get back to right GL
- Attach automated pricing approval
- OpenAir project needs to be generated for expenses (must populate Bill To and Ship To contacts to do this)
- Channel = Internal
- Opportunity Type = If it's a new SOW, it should be New Business (NB). If there are cases where it is not a new SOW or new product schedule, it should be New Business Existing Account (NBEA)

From: Hanson, Peder <peder.hanson@optum.com>
Sent: Wednesday, April 9, 2025 1:10 PM
To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Shin, John S <john.shin@optum.com>; Thompson, Brian <brian.thompson92@optum.com>; Nand, Durga <durga.nand@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Cc: Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Zarozny, Sheryl <sheryl.zarozny@optum.com>; Linnander, Robert M <LinnandR@Optum.com>; Swanson, Robert H <robert.swanson@optum.com>; Moeller, Scott L <scott.moeller@optum.com>; Matousek, Matthew M <matthew.matousek@optum.com>; Badstibner, Emily L <BadstibE@Optum.com>; Mcmichael, Sophie B <mcmichaels@optum.com>; Koziara, Kyle <kyle.koziara@optum.com>; Welter, Brett <brett.welter@optum.com>

To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Shin, John S <john.shin@optum.com>; Thompson, Brian <brian.thompson92@optum.com>; Nand, Durga <durga.nand@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Cc: Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Zarozny, Sheryl <sheryl.zarozny@optum.com>; Linnander, Robert M <LinnandR@Optum.com>; Swanson, Robert H <robert.swanson@optum.com>; Moeller, Scott L <scott.moeller@optum.com>; Matousek, Matthew M <matthew.matousek@optum.com>; Badstibner, Emily L <BadstibE@Optum.com>; Mcmichael, Sophie B <mcmichaels@optum.com>; Koziara, Kyle <kyle.koziara@optum.com>; Welter, Brett <brett.welter@optum.com>
Subject: RE: Microsoft ECIF-funded UHG Opportunities: $0 SoW Governance Discussion / ECIF commercial component

Hi all, a small note on naming convention: can we agree to use the same "suffixes" shown below for ECIF-funded projects?

O714981
RAD Data Modernization - MSFT ECIF Implementation · Microsoft Corp

O719008
RAD Data Modernization - UHG $0 SoW · UHG Corporate

Notes:
1. For the internal $0 SoW, "UHG Corporate" will be replaced with the name of your internal Customer (OptumTech, M&R, etc.) In this example the internal client is UHG Corp.
2. "Implementation" in the above may be replaced with "Governance" for applicable projects.

Peder Hanson | Technology Consulting | Optum Insight

From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Sent: Tuesday, April 8, 2025 9:47 AM
To: Moeller, Scott L <scott.moeller@optum.com>; Linnander, Robert M <LinnandR@Optum.com>; Swanson, Robert H <robert.swanson@optum.com>; Zarozny, Sheryl <sheryl.zarozny@optum.com>
Cc: Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>; Matousek, Matthew M <matthew.matousek@optum.com>; Badstibner, Emily L <BadstibE@Optum.com>; Mcmichael, Sophie B <mcmichaels@optum.com>; Shin, John S <john.shin@optum.com>; Koziara, Kyle <kyle.koziara@optum.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>; Welter, Brett <brett.welter@optum.com>
Subject: Microsoft ECIF-funded UHG Opportunities: $0 SoW Governance Discussion / ECIF commercial component

+@Linnander, Robert M and @Zarozny, Sheryl for visibility to this thread – Microsoft-funded UHG ECIF projects will be treated as commercial Sales / Revenue

+@Swanson, Robert H – Emily pointed out that you should have visibility to this thread as well from billing perspective

@Moeller, Scott L / @Swanson, Robert H – and others –

- What will be the Term Sheet Process for the commercial component of these opportunities?

We will upload the OA-MSFT approved SoW to SF.

Best,
Dinesh Malhotra
M: +1 773-398-7713

From: Moeller, Scott L <scott.moeller@optum.com>
Sent: Monday, April 7, 2025 9:48 AM
To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Welter, Brett <brett.welter@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

Hi Dinesh,

If the customer is Microsoft the channel should be Direct.

Regards,

Scott Moeller | OptumInsight

11000 Optum Circle
MN101-E700
Eden Prairie, MN 55344

scott.moeller@optum.com
www.optum.com

From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Sent: Sunday, April 6, 2025 9:12 PM
To: Moeller, Scott L <scott.moeller@optum.com>; Welter, Brett <brett.welter@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

Hi Brett / Scott – I am back from PTO and picking up this thread

Don't recall if a decision was made about the Channel classification of MSFT-specific opportunity
- Should the 'Channel' be tagged as 'Direct', 'Indirect' or 'Internal'?

The $0 SoW opportunity with the UHG P&L will be tagged as 'Internal' as we always do.

Best,
Dinesh Malhotra
M: +1 773-398-7713

From: Abraham, Brett <brett_abraham@optum.com>
Sent: Thursday, March 27, 2025 2:28 PM
To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Moeller, Scott L <scott.moeller@optum.com>; Welter, Brett <brett.welter@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

<peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

Hi all,

I went through and created two test opportunities to utilize the "related to" and "related from" feature in Salesforce. Thanks to Emily Badstibner, I was able to get a job aide that walks through the feature and a master credit opportunity. Below I've linked three items that can better explain the process:

1. Video detailing "related from/to" process: Related to from Salesforce.mp4
2. Job aide for the feature: How do I Use "Related To/Related From" to Link Opportunities Together? | Knowledge | Salesforce
3. Job aide for a master credit opportunity: Master Credit & Work Order Opportunities | Knowledge | Salesforce

Best,
Brett

From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Sent: Thursday, March 27, 2025 1:30 PM
To: Moeller, Scott L <scott.moeller@optum.com>; Welter, Brett <brett.welter@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Subject: Re: $0 SoW Governance Discussion | ECIF

Thank you Brett and Scott - appreciate the partnership!

Best,
Dinesh Malhotra
M: +1 773-398-7713

From: Moeller, Scott L <scott.moeller@optum.com>
Sent: Thursday, March 27, 2025 12:39:14 PM
To: Welter, Brett <brett.welter@optum.com>; Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

Quick follow up on this. Resources do NOT need to be assigned in the internal project as well, causing a risk of time entry confusion. When my team QC's OpenAir we'll assign whomever is listed as the OCR in SFGO.

As long as one person is listed in the OA tasks any expense reports submitted will flow and be charged to the internal customer.

Regards

FW: Microsoft ECIF-funded UHG Opportunities: $0 SoW Governance Discussion / ECIF commercial component

SJ Shin, John S
To Palla, Sandeep; Llanos, Juan F; Cheema, Dave; Bangale, Gaurav; Sharma, Mudit; Kalidindi, Venkata; Tee, Vicky Hui Meng

Reply | Reply All | Forward | Fri 4/11/2025 5:44 PM

Retention Policy UHGInbox (90 days) Expires 7/10/2025

Start your reply all with: Will do, thanks! | Thank you! | Thanks for sharing! | Feedback

www.optum.com

From: Welter, Brett <brett.welter@optum.com>
Sent: Thursday, March 27, 2025 12:04 PM
To: Abraham, Brett <brett_abraham@optum.com>; Nand, Durga <durga.nand@optum.com>; Hanson, Peder <peder.hanson@optum.com>; Thompson, Brian <brian.thompson92@optum.com>; Malhotra, Dinesh <dinesh.malhotra@optum.com>
Cc: Bridgeman, Wm. Gregg <gregg.bridgeman@optum.com>; Moeller, Scott L <scott.moeller@optum.com>; Gabor, Ferenc <ferenc.gabor@optum.com>; Thomason, Constance T <constance.thomason@optum.com>; Johnson, Scott D <scott.d.johnson@optum.com>
Subject: RE: $0 SoW Governance Discussion | ECIF

All –

Scott M. confirmed last night that in order for you to be able to submit travel expenses to the UHG client, the UHG Project will need to be kept **Active** in SPP(OpenAir). The Project Owner should keep this project active, just do not assign other resources to it to avoid time getting logged there.

I'd recommend a naming convention to distinguish between the two projects as well for example, "MSFT – RAD Modernization" & "UHC Corp – RAD Modernization"

Thanks
Brett

-----Original Appointment-----
From: Abraham, Brett <brett_abraham@optum.com>
Sent: Monday, March 24, 2025 1:19 PM
To: Abraham, Brett; Welter, Brett; Nand, Durga; Hanson, Peder; Thompson, Brian; Malhotra, Dinesh
Cc: Bridgeman, Wm. Gregg; Moeller, Scott L; Gabor, Ferenc; Thomason, Constance T; Johnson, Scott D
Subject: $0 SoW Governance Discussion | ECIF
When: Wednesday, March 26, 2025 4:00 PM-4:30 PM (UTC-06:00) Central Time (US & Canada).
Where: Microsoft Teams Meeting

Need to move the meeting to Wednesday due to a last second schedule conflict for a key meeting lead.

Goal is to review the $0 SoW contracting arrangement and scope to ensure all individuals are aligned.

Microsoft Teams Need help?

Join the meeting now

Useful links

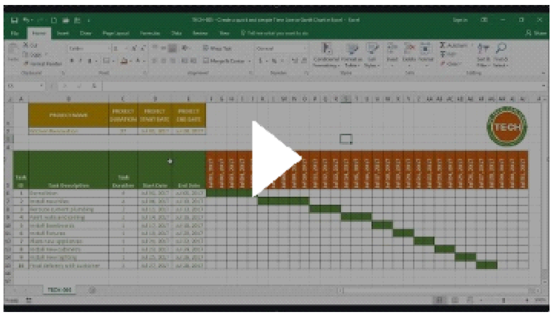
Wednesday, January 24, 2024 9:38 AM

https://uhgazure-my.sharepoint.com/:v:/g/personal/john_shin_optum_com/EYCCE2LJsflGlXT8bNN1ZW8BZMuu7DDOfgWuFF45niNXVg?referrer=Teams.TEAMS-ELECTRON&referrerScenario=MeetingChicletGetLink.view.view

To request resources: https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Wor.aspx
Workforce Management: https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Wor.aspx

Core skills for the future: https://www.linkedin.com/posts/wdavidmcleanatgetkeepgrow_chro-hr-ceo-activity-7318586290986184705--EMz?utm_source=share&utm_medium=member_ios&rcm=ACoAAACFp3wBgFHoXYrBPGtqxceizHlVLjGJemI

Gantt Chart Example: TECH-005 - Create a quick and simple Time Line (Gantt Chart) in Excel



RACOS Cloud Migration

Wednesday, December 18, 2024 2:03 PM

1. Functional scope
2. Data and integrations scope
3. UI and workflow scope
4. Technology stack and architecture
    1. Target technology stack (if the team has already thought through this)
5. End user / downstream consumers and nature of consumption (Reports (PBI), AI/ML models, batch files, APIs, streams etc.)
    1. Volume of reports, batch files, APIs etc.
6. Technology debt impairing business agility
    1. Initial scope that would require re-engineering of product to address existing Tech Debt limitations
7. Approximate monthly O&M cost (focused on infrastructure)
8. Post-migration considerations

Submission engine for encounter data
Medicare based Medicare Advantage encounters
They reach via ECG
ASM - Alternate Submission Method
Producing and sending data to plans
Professional claims only
Validate membership and provider data
Redwood is 3 years old, Python, Django and MongoDB is on-prem by a team of OptumInsight
Process is ECG in and ECG out
Some files on internal NAS as well
REDWOOD has UI
Error correction UI
API calls to NPPS
Data goes thru states and errors
Very limited event-based things
LIVEOAK is PYTHON, Daily
Redwood is
PYTHON generates 837s
Both apps have UI's
LIVEROAK is about a year old and RED OAK is ~3 years old
Everything is containerized and runs in Dockers
Everything runs in Linux based
ETL transform data to
Use Talend for ETL
Store data in Object storage
30K - 40K per month
Also have NOMAD

Contacts

Thursday, March 28, 2024 2:22 PM

EIS Contacts:

- Kerkhof, Niels niels_kerkhof@optum.com
- Anil Chopra (EIS) anil_chopra@optum.com
- Brian Troen
- Brent Robertson
- Conahan, Patrick <patrick.conahan@uhg.com>
- Dan Wilkin
- Patrick Enright

++

CDC: Will McGee

Snowflake contacts:

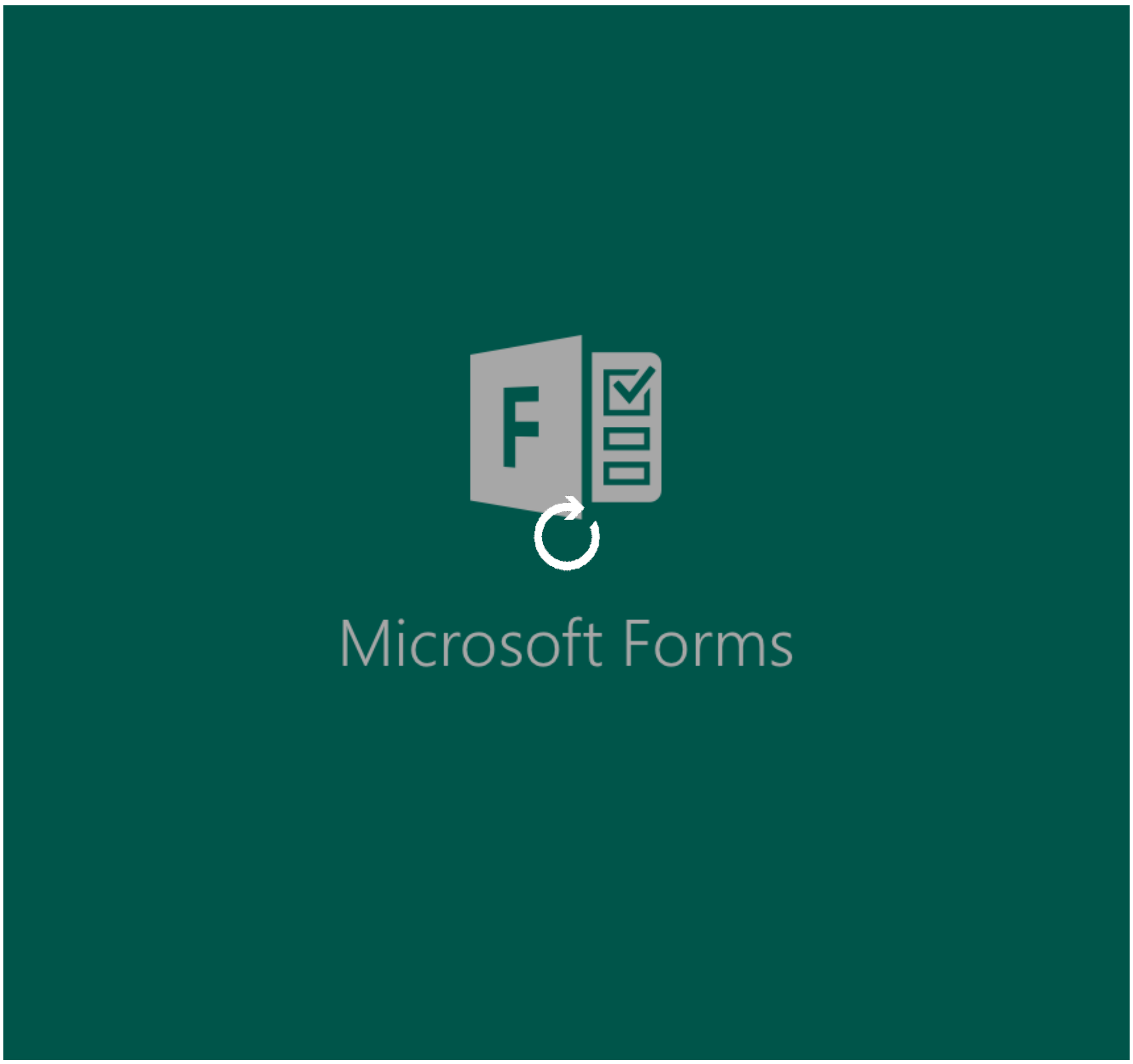
Snowflake account exec: Mike Miller mike.miller@snowflake.com
Solution architect: Mike Fulkerson mike.fulkerson@snowflake.com
Solution architect: Gene Furibondo gene.furibondo@snowflake.com

HCC:

Chad R Brovold
Shenbagaraman, Subbiah

++

ECIF Intake Form: Microsoft Forms



Consulting Pricing & Deal Review

Saturday, January 4, 2025 4:28 PM

https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx

++

From: Shin, John S <john.shin@optum.com>
Sent: Thursday, December 12, 2024 9:37 AM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Hi Dave,

Please use the guidance I have provided to put together a "How to Guide" for the Following:

- Process for Proforma (Pricing) Draft and Approval
- Process for SoWDraft and Approval

Be very explicit and detailed in describing the process including things like clicking on Show All. Please schedule a call with me in the first week of the new year to review your drafts.

Thanks,

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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From: Shin, John S <john.shin@optum.com>

Date: Thursday, December 12, 2024 at 9:34 AM

To: Cheema, Dave <dave.cheema@optum.com>

Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Click on "Show All" link to expand…

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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From: Cheema, Dave <dave.cheema@optum.com>

Date: Thursday, December 12, 2024 at 9:31 AM

To: Shin, John S <john.shin@optum.com>

Subject: RE: Pricing for O695378-27105 - RAD Data Modernization Implementation

John,

I'm not seeing Files under "Related List Quick Links". Am I missing something? Please help. Thanks.
Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Thursday, December 12, 2024 9:07 AM
To: Cheema, Dave <dave.cheema@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

Hi Dave,

Sounds like you have completed the pricing approval steps as needed. Next steps are as follows:

- Goto SFGO and upload formal pricing approval email to Opportunity
    - https://optumgrowth.my.salesforce.com/
    - Search for opportunity O695378 in Search bar
    - After clicking on opportunity to open, look in "Related List Quick Links" section on right side of page
    - Click on "Files" link and upload email approval from Pricing portal
- Draft SoW for this opportunity
    - Download latest template from Term Sheet sharepoint site
        - https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
        - Click on "NEW Intersegment_Term_Sheet…" button to download latest version of Term Sheet
    - Use attached as reference and fill out new Term Sheet to create SoW
        - Need to complete "SOW" and "Business&Financial" tabs
- Schedule review with me before sharing with Dinesh for final review

Hope that helps

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

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From: Cheema, Dave <dave.cheema@optum.com>

Date: Wednesday, December 11, 2024 at 11:53 PM

To: Shin, John S <john.shin@optum.com>

Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>

Subject: RE: Pricing for O695378-27105 - RAD Data Modernization Implementation

John,
I have already done all that – got re-approval from Matt for the 2nd time; got formal approval for the revised pricing model as well. Do I need to do that again for the third time? If yes, what will be the purpose of that? Thank you.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, December 11, 2024 10:05 PM
To: Cheema, Dave <dave.cheema@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: Re: Pricing for O695378-27105 - RAD Data Modernization Implementation

You need updated proforma to go through the same process of 1) getting approval from Matt and 2) submitting for formal pricing approval again.

Get Outlook for Android

From: Cheema, Dave <dave.cheema@optum.com>
Sent: Wednesday, December 11, 2024 8:30:17 PM
To: Shin, John S <john.shin@optum.com>
Cc: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: FW: Pricing for O695378-27105 - RAD Data Modernization Implementation

John, Dinesh,

Received formal pricing approval. What would be the next step(s)? Thank you.

Regards,
Dave Cheema

From: Optum Advisory Services SharePoint <consulting_sharepoint2013@optum.com>
Sent: Wednesday, December 11, 2024 8:29 PM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Pricing for O695378-27105 - RAD Data Modernization Implementation

The pricing for O695378-27105 - RAD Data Modernization Implementation has been Approved.

This email can be uploaded in Salesforce as confirmation of pricing approval.

Status: Approved
OAS Business Segment: Payer
Project Name: 27105 - RAD Data Modernization Implementation
Salesforce ID: O695378
Comments:

Please do not respond directly to this email but rather reach out to the following team contacts: Deal Review - Sarah Walsh and Pricing Review: Kyle Koziara.

OA Sales Proposal Process

Tuesday, February 4, 2025 9:25 PM

OA Sales Proposal Process

In this document, we'll be covering the proposal definition, pricing proforma draft, and SoW draft & submission process at Optum Advisory

- Proposal Definition
- Pricing Proforma
- SOW Draft
- Submission Process

Proposal Definition

A paper or digital document used to **pitch services or products to prospective clients** and current customers. It outlines the **value proposition, features, benefits, pricing, and terms** of the offering. The goal of a sales proposal is to **persuade the prospective buyer that the seller's solution is the best fit for their needs** and to encourage them to make a purchase or enter into a business agreement. A well-crafted sales proposal **addresses the client's specific requirements and demonstrates how the proposed solution will solve their problems** or improve their situation. The following is an outline of a typical proposal at Optum:

- Understanding & expectations
  - Our understanding
  - Outcomes expected from OA engagement
- Proposed approach
- Recommended roadmap
- High level architecture
- Implementation summary
- Staffing, Roles and Responsibilities
- Effort estimates - details should be generated using a time-tested estimation technique - Component Based Effort Estimates
- Commercials Summary
  - List out prices by phase, e.g., Assessment, Solution definition & design, Dev & Test, Deployment & Historical data migration,End-to-end testing, Production Acceptance Testing (PAT), and Decommission
- Appendix - Additional material you want the client to read/educate

Pricing Proforma

Upon proposal definition completion, you need to prepare Pricing Proforma

- To create a Proforma, download the lates pricing proforma template from https://uhgazure.sharepoint.com/sites/OIAdvisory/Staff/finops/Pipeline%20And%20Staffing/Finance%20and%20Ops%20Reporting/Pricing%20and%20Deal%20Review%20Templates/2025%20Consulting%20Pricing%20Template_01.30.25%20-%20Mac%20and%20Windows.xlsm?d=wb5dc131a0a754d898522c95b26ffebe6
- Rename it using the following format: <*year*> Consulting Pricing - <*Salesforce Opportunity ID*> <*Salesforce Opportunity Name*>
- Fill out the Pricing Proforma and review it internally
- Submit pricing approval request to Matt Matousek <matthew.matousek@optum.com> and CC "GoDigitalfromHello" group. Attach the proforma sheet in the email. Below is a sample Pricing Proforma Summary:

Project Salesforce Product Code Deal Type	Technology-Tech Digital Fixed Fee - Monthly		
Total Revenue	$	138,500	
Total Engagement Margin	$	39,338	*28%*
Target EM - Resource Mix			*36%*
Target EM - Project TOW			*46%*
Estimated Travel	$	-	*0%*
Pass Through / Consulting Products	$	-	
All in Revenue	$	138,500	*28%*
Estimated IOI	$	19,687	*14%*

  - Save Matt's Approved email
- Submit a formal pricing approval request at the link below. Choose the "**Pricing and Deal Review Submission**" button under Links to complete form and submit.
  - https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx

    Note: Opportunities over $1M will be reviewed by the Deal Review team. Once the Deal Review is approved, edit the existing submission to add the Deal Review Approval details.
  - Fill in all required information.
  - Upload Matt's Approved email and the Pricing Proforma sheet
- Once Deal Review approval email is received: 1. save it; 2. Goto Salesforce and upload formal pricing approval email to the Opportunity
  - https://optumgrowth.my.salesforce.com/
  - Search for opportunity <*opportunity ID*> in Search bar
  - After clicking on opportunity to open, look in "**Related List Quick Links**" section on right side of page and click on "**Show All**"
  - Click on "**Files**" link and upload email approval from the Pricing portal

SOW Draft

- Draft SoW for this opportunity
  - Download the latest template from Term Sheet SharePoint site
    - https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
    - Click on "**NEW Intersegment_Term_Sheet…**" button to download the latest version of the Term Sheet
  - Rename the term sheet to the following format: Intersegment Agreement - <*Salesforce Opportunity ID*> <*Salesforce Opportunity Name*>
  - Fill out the new Term Sheet to create SoW
  - Be sure to complete "**SOW**" and "**Business&Financial**" tabs of the Term Sheet

Submission Process

- Review the SoW internally and with the client to ensure all accounting information is correct
- Send a formal SOW approval email titled "**SOW Approval requested: <*Salesforce Opportunity Name*>**" along with the Term Sheet to the client. Below is a sample email to the client:

  From: *sender name <sender.name@domain_name.com>*
  Sent: Wednesday, January 8, 2025 3:51 PM
  To: *client name<client.name@domain_name.com>*
  Cc: *Johnson, Scott D <scott.d.johnson@optum.com>*; GoDigitalfromHello <godigitalfromhello@uhgazure.onmicrosoft.com> and other stakeholders
  Subject: SOW Approval requested: **<*Salesforce Opportunity Name*>**

<Salesforce Opportunity Name>

SOW & Pricing Proposal

Hello *<client contact name>*,

Thank you for choosing the Optum Advisory– Digital Transformation team to help support for your continued effort to modernize RAD Data Platform. Attached you will find the SOW & Pricing Proposal for this initiative. Please let me know if you have questions. I appreciate your trust in our team to support you.

Snapshot:

- Ask: ***<Salesforce Opportunity Name>***
- Duration: **1/13/2025 - 8/15/2025**
- Total Cost Estimate: **$999,999**

Next Steps:

1. **Review** the attached SOW for scope, pricing, terms, and conditions
2. If you agree with the terms, simply respond to this email with **"Reviewed and agree."**
3. You will receive an email notification from Optum's 'iTRAC Tool' for your **formal online approval** of this SoW
4. The **Finance team** member too need to provide their approval via 'Intake Tool'.
   Please confirm the name of your Finance Team member along with the GL string for billing\
   a. GL String:

- BU: 99999
- OU: 99999
- Dept: 999999
- Location: USASS800

   a. Finance Contact: *Finance Contact Name | finance.contact@domain_name.com*

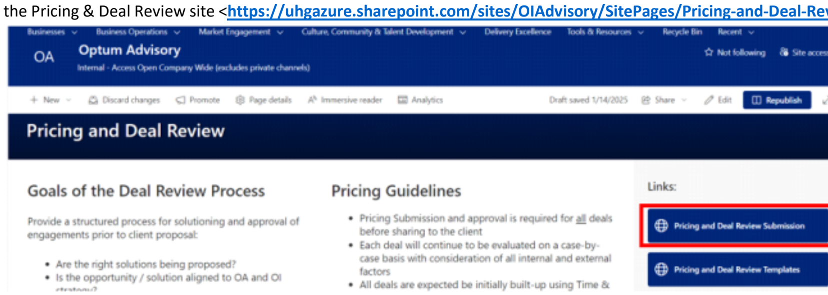
OA Digital Transformation Key Business and Technical Contacts:

- *John Doe*
- *Daffy Duck*
- *Thomas Smith*

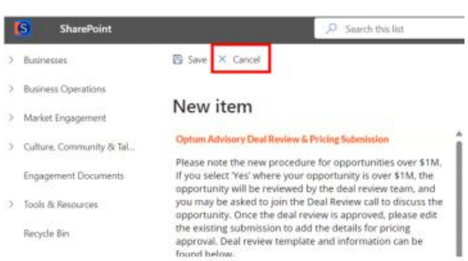
- Upon receiving the approved email from the client, submit the SoW into the Term Sheet Submission Tool: https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx
- Once you get the approval email from the Term Sheet team, continue with the subsequent steps

To search for a specific Pricing & Deal sheet

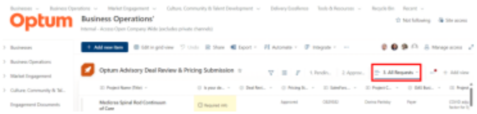
Go to the Pricing & Deal Review site <**https://uhgazure.sharepoint.com/sites/OIAdvisory/SitePages/Pricing-and-Deal-Review.aspx**>



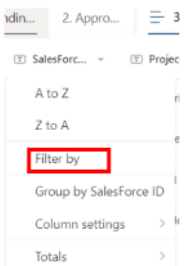
Click on Pricing and Deal Review Submission (circled in Red)



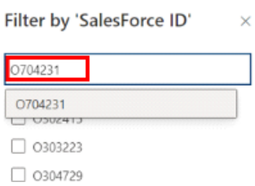
Click on Cancel (circled in Red)



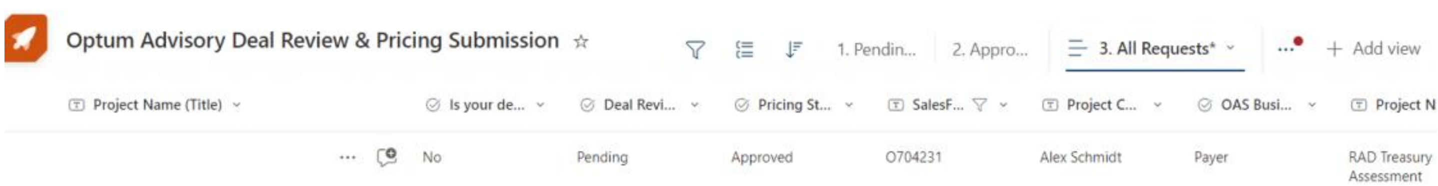
Click on **3. All Requests** (circled in Red)



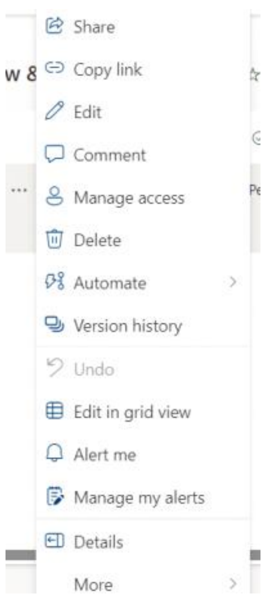
Click on **Filter by** and on the right side of the page a dialog will open up



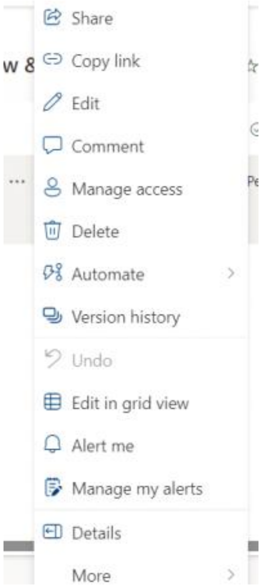
Enter the Salesforce opportunity ID and hit Enter key. **Apply** button, at the bottom of the dialog box will be enabled
Click on **Apply** button



The selected Salesforce opportunity ID will be shown in the list
Click on ••• (three horizontal dots)

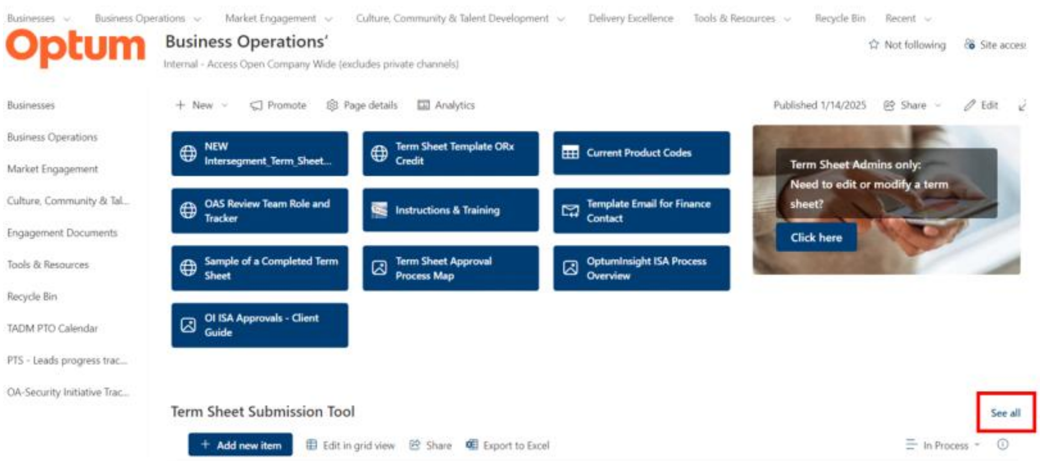


You can do the above shown actions to the selected Salesforce opportunity ID

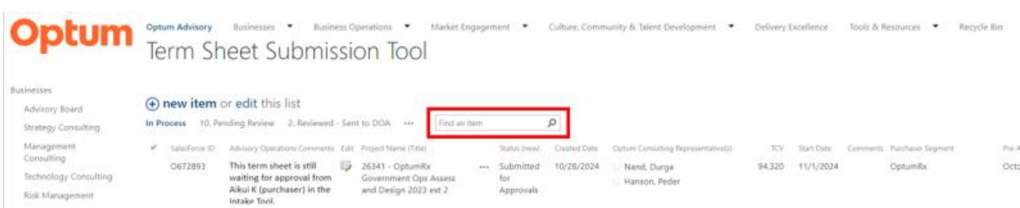


To search for a specific Term Sheet:

- Go to: https://uhgazure.sharepoint.com/sites/OIAdvisory/staff/SitePages/Term-Sheet-Submission-Tool.aspx



- Click on **See all** (at the bottom right of the image above)



- Enter the Salesforce Opportunity ID in the search box (middle of the image above).
  - You'd be able to search term sheet for desired Opportunity

Meetings

Saturday, January 28, 2023 10:50 PM

Meeting 01/26/2023 with Dinesh M.
Subject: Touch base
Have conversation with Christy Wenninghoff
What are the
Kaiser Permanente
Prashant Naik - for direction at the enterprise
++
Meeting 01/26/2023 with Dinesh M.
Subject: CLDT opportunities and ideations

Explore data cloud migration and modernizaton

Start thinking about the multi-cloud Data Mesh possibilities

Due to reorg, there could possibly be some opportunities
We need to explore those
What opportunities exist due to their gap; what are the value gaps; what is really hurting the team; which values have they not been able to deliver.
+++
Meeting 02/01/2023 with Dinesh
Subject: Org changes

One month extension, till end of Feb.
Update structural profile updated
Start coordinating with Nora Webber
Start looking for new things
Get resume updated
Start vacations, training in March

Transition to John Shin
+++
Meeting 03/08/2023 with Dinesh
Subject: Catching up

For Dinesh:
- Engagement with Vikram
- John Shin - talk with Dinesh about what John mentioned about the kind of work I'm doing by working with Vikram
- Review of Data Mesh deck
- Review of Approach of M360

+++
Meeting 04/04/2023 with StarBurst
Subject: Introduction and capabilities
StarBurst Data Introductions
Supports UHG
How is it currently being used
UHG is StartBurst customer
Working with AI studio with Sandeep Dadlani
StarBurst is the Analytics engine under Panacea
Trino is the core part of their engine, started from Facebook
Only MPP engine
We don't care where data lives
Q. Since you don't care where data lives, how is the performance
Virtual tools are the predecessors of StarBurst
+++
Meeting 04/11/2023 with Jordan Williamson
Subject: Introduction
Optum Tech Product Office: Kenny Kiser
ask about a product assessment framework
Engineering Excellence: https://docs.hcp.uhg.com/engineering-excellence/overview
Engineering Excellence Framework: Jesse Aalberg
Data Catalog & Platform: Kristy Hanson, Aaron Strey

Emails

Friday, November 11, 2022 11:23 AM

Process to track and manage the U-Channel Contractor Staffing

Malhotra, Dinesh

To Cheema, Dave; Shin, John S; Koneti, Rajesh; Anantha Ramakrishnan, Srinivasan; Nand, Durga

Cc Tee, Vicky Hui Meng; Malhotra, Dinesh

Reply | Reply All | Forward | ...

Fri 11/11/2022 11:20 AM

Retention Policy UHGInbox (90 days) Expires 2/9/2023

Internal

All –

The U-Channel staffing requires demand and supply coordination, lead management and expects defined ownership from our team members.

I have discussed some process changes with some of you over last few days. We will refine our thinking over next few days and define the process that is more manageable with defined ownership and accountability from the team members on this email – please stay tuned for details to come over next week or two

In the interim – I request you to do the following with immediate effect

1. When you interview any candidate, please DO NOT REPLY ALL to the meeting invite with the feedback for the candidate
    a. Our response should never include the external vendors as the recipients
    b. Megan is the face to the vendors supplying resources – not us
2. Provide your candidate recommendations against the original email thread where you accepted to be the point person for interviewing the candidate
    a. This would preserve traceability to the original demand and the staffing context – which is very critical for some of us to understand the overall status for the demand pipeline
3. All Mindtree and TCS demand should be funneled through Anantha, John, and Durga

Please keep me copied on these preferred vendor communications

++

RE: Touching base...

Malhotra, Dinesh

To Cheema, Dave

Retention Policy UHGInbox (90 days) Expires 4/17/2023

Internal

Hi Dave – might I suggest modifying the agenda for our 1:1 to include the following:

1. Review your blue chips
2. Practice growth ideation
3. Capability development
4. Any other topic requiring imminent attention

Best,

Dinesh Malhotra

M: +1 773-398-7713

++

Meeting 01/19/2023 with Dinesh M.

Subject: 2023 targets and expectations

OKRs - what would you need to accomplish to meet those objectives

1. Start being more deliberate about meeting objectives - est. 5 new contacts to advance our agenda. start conversations on how you can help them meeting their goals and targets. Relationship is a pillar in consulting

2. should target a new certification every year
3. Snowflake and Databricks side certification, Kafka is another demand area
4. Put together a mini presentation of platforms for 2023
5. Start focusing on personal and OAS growth. Be deliberate.
6. Be more aware of market pulse and create ideations to create more demand. How are we qualifying commercial viability
7. Origination of leads at least 3 per year
8. What is the cost of the opportunity
9. Need to build more leads
10. MBO target is $1.5M

++

Fwd: Tech Forward

Malhotra, Dinesh

To Nand, Durga; Ramakrishnan, Anantha; Shin, John S; Dubrow, Eric B; Busarapu, Hari; Shirley, Laura; Bakken, Lynnea N; Wasserman, Brett; Koneti, Rajesh; Cheema, Dave

Cc Choudhary, Arijit R; Matousek, Matthew M; Das, Dip Narayan

Reply | Reply All | Forward

Tue 2/14/2023 10:

Retention Policy UHGInbox (90 days) Expires 5/15/2023

Internal

Start your reply all with: Received, thank you. | Thank you! | Will do, thanks! | Feedback

Team - sharing - please peruse the Tech Forward content to build familiarity with the scope of program and initiatives

Get Outlook for iOS

From: Suresh, Karthik <karthik.suresh@optum.com>
Sent: Tuesday, February 14, 2023 4:01 PM
To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Choudhary, Arijit R <arijit_choudhary@optum.com>
Subject: RE: Tech Forward

Hi Dinesh – all is well and nice to catch up after a long break. Arijit also reached out yesterday and did give a heads-up that this was coming. Here is some pre-read and the if you can share the angle at which you want to explore *(for e.g. Within digital ecosystem Paper free in specific because they are talking to OAS for staff-aug, overall change mgmt. of Tech forward for the broader enterprise including OI or anything in clinical or admin like OCM, EDI, Omni)* I could come with the right level of details and maybe even pull one of the other portfolio lead that oversees clinical/transactional like I do for digital, consumer and enablement.

Pre-read if you haven't seen these already :

1. Tech forward sparq page (good primer) : Tech Forward (sharepoint.com)
2. Tech forward program office SharePoint (portfolio level click down) : The Tech Forward program (sharepoint.com)
3. Tech forward walking deck (deeper look at program, workstreams, governance etc.) :
   Tech Forward Walking Deck.pptx

After we meet – I can also give access to you and others to our deep dive recording folder below which has a 60 minute deep dive covering enterprise business value, roadmap, architecture and adoption across all capabilities :

CapabilityReviewDeepDiveRecordings

Best,

Karthik Suresh | OptumTech

Click below to be part of the future

-----Original Appointment-----
From: Malhotra, Dinesh <dinesh.malhotra@optum.com>
Sent: Tuesday, February 14, 2023 10:57 AM
To: Malhotra, Dinesh; Suresh, Karthik; Choudhary, Arijit R
Subject: Tech Forward
When: Thursday, February 16, 2023 4:00 PM-4:30 PM (UTC-06:00) Central Time (US & Canada).
Where: Microsoft Teams Meeting

Hi Karthik – trust all is well in your neck of the woods.

Putting a marker for us to connect and learn about the scope of the Tech Forward that you are overseeing and get a broader understanding of key initiatives

____

Microsoft Teams meeting

Join on your computer, mobile app or room device
Click here to join the meeting
Meeting ID: 281 449 280 727
Passcode: gHnzpX
Download Teams| Join on the web
Join with a video conferencing device
425899727@t.plcm.vc
Video Conference ID: 114 051 539 03
Alternate VTC instructions
Or call in (audio only)
+1 952-222-7450,,889066888# United States, Bloomington
Phone Conference ID: 889 066 888#
Find a local number| Reset PIN
Learn More| Help| Meeting options
++

Have a plan as you roll off in 2 weeks

Malhotra, Dinesh
To Cheema, Dave
Cc Shin, John S; Malhotra, Dinesh
Reply | Reply All | Forward
Wed 2/15,
Retention Policy UHGInbox (90 days) Expires 5/16/2023

1. Connect with Nora Weber and let her know about your availability as of March 1. Nora is the staffing coordinator
2. Connect with to Brian Thompson and share with him what strengths you bring in the data area. Brian is running the Transformation Hub and will have line of sight to potential opportunities
3. Check out daily for open roles on Structural and apply for the open roles actively
4. Build and expand your relationship network within U-Channel and get close to the business issues various stakeholders are trying to solve in their areas. That could help originate leads
5. Build and expand your network across other OAS practices and make your colleagues aware about your brand and your strengths - and learn about them
6. Reflect on your experience and identify any specific capability gaps that you worked on and may have a value-add potential for other prospects in commercial segment or even U-Channel

7. Have a weekly plan for when you are on the bench for what learnings and certifications you would target. Share weekly update with your people manager
8. Ask your people manager for what Practice Development initiatives you can support
9. Think how you can add value to Cloud and Data-led Transformation Community of Practice
10. Consider using your PTO while you are waiting to get staffed.
    Reach out to me or John should you have any questions.
11. Connect with Scott Johnson – make introductions and share with him your strengths. Scott typically has the first line of sight to U-Channel opportunities

Thank you!

++

1-on-1 w/ Dave Cheema

SJ Shin, John S
Required Cheema, Dave

Accept | Tentative | Decline

Wed 2/15/2023 6

Retention Policy UHGDeleted (1 week) Expires 5/16/2023

We couldn't find this meeting in the calendar. It may have been moved or deleted.

Occurs every 2 week(s) on Thursday effective 2/16/2023 from 3:00 PM to 3:30 PM

Agenda: *Please provide updates on below via reply email 1 day prior to 1-on-1*

Current Engagement(s):

- Program Name:
  - Start Date:
  - End Date:
  - Client Manager:
- Key Highlights of Activities
  - [key deliverables]
  - [concerns]
  - [input/guidance needed]

Practice Contribution/Development

Professional Development:

- Training Opportunities
  - [Training in-progress]
  - [Training desired]
- Career Aspirations
  - [Objective on growth]
  - [Do you have a plan of action?]

Other:

- Annual Review Considerations?
  - [Key Achievements tied to MAP Goals]
- How can I help you do your job better?
  - [What more can I do?]

++

NetSuite OpenAir - New booking created New booking created

W www@openair.com
To Cheema, Dave

Reply | Reply All | Forward | ...

Thu 6/22/2023 4:14 PM

Retention Policy UHGInbox (90 days) Expires 9/20/2023

We removed extra line breaks from this message.

Dave Cheema

You have been booked as follows:
Customer: UHC Medicare & Retirement
Project: Insurance Solutions: Cloud Data Strategy Project ID: 119324
Requester: John S Shin

for the period
Starting on: 06/19/23
Ending on: 09/01/23

Booking type: 1-Sold
Booked: 5%

++

Me

Saturday, January 28, 2023 10:50 PM

[Opportunities - Optum Advisory Services (structural.com)](https://referrals.unitedhealthgroup.com/job-search-results/)
https://referrals.unitedhealthgroup.com/job-search-results/

John and I spoke about my allocation to the MRIS Modernization project. John explained it to me that my allocation would be 70% to this project and the expectations would be to carry out **Program Management**, **Project Management**, **Cloud Architecture**, **Cloud Administration**, and **cloud engineering** duties. I have no problem with the 70% allocation. However, the issue that it is way too much of a workload to be carried out within the 70% allocation. That is unrealistic expectation to carry out all those duties in a 5-6 hours/day. But John said something that startled me even more,. that I would be expected to work the whole time and charge only 70% of my time. John suggested that perhaps the remaining time can be charged to some other activity, such as, training. The problem with that is that training is not counted against utilization. It would be difficult to justify way more 100% of working and showing utilization only 70%. Cloud engineering is very time consuming.

Technical platform activities - admin activities
After 4th month lead platform admin activities - take ownership
At the same time - also planning, work with John
DEEP project - initial plan will start in May

85% utilization is acceptable

Bravo! Diamond Recognition from DINESH MALHOTRA

Friday, November 11, 2022 2:05 PM

Subject	**Bravo! Diamond Recognition from DINESH MALHOTRA**
From	UHGBravo@globoforce.com
To	Cheema, Dave
Sent	Friday, November 11, 2022 1:02 PM

DM DC

DINESH MALHOTRA awarded**You**

Leadership

November 11, 2022

Thank you for your proactive leadership

Hi Dave - Thank you for proactively bringing forward referral candidates to meet growth needs of the PTS practice. I appreciate your proactive leadership mindset and thoughtfulness. I also thank you for prioritizing and making time for talent review and screening of candidates to meet the staffing demands for various projects and helping us responsively meet our client's needs. Thank you!

Diamond Award

Say Thanks

Thank DINESH MALHOTRAfor this recognition

UNITEDHEALTH GROUP®

Print your award (PDF)

Visit your **Recognition Program** or **Download Mobile App**

CCG

Tuesday, February 18, 2025 2:06 PM

> Convenient Checkout Gateway (CCG) currently relies on another vendor(s) for performance data, dashboards, and data availability. This dependency limits their ability to access and gain insights into their Key Performance Indicators (KPIs). The objective of this project is to provide Convenient Checkout Gateway with direct access to their performance data and enable them to generate insights independently.

https://dashboard.stripe.com/reports/hub

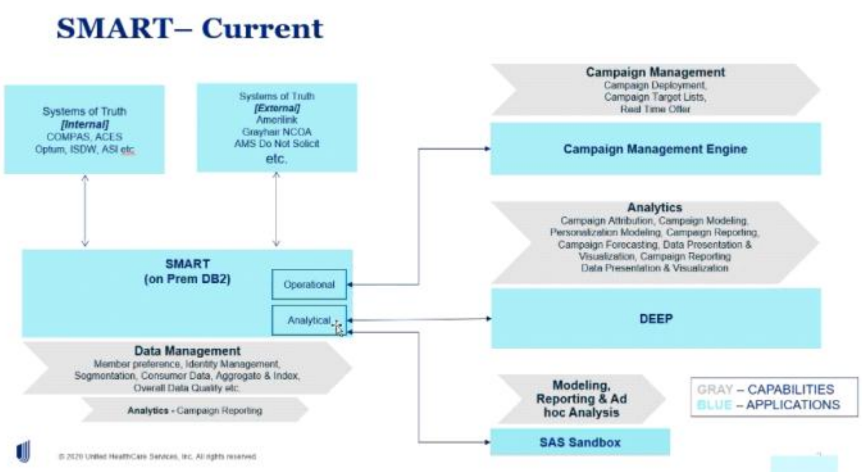
Stripe dashboard

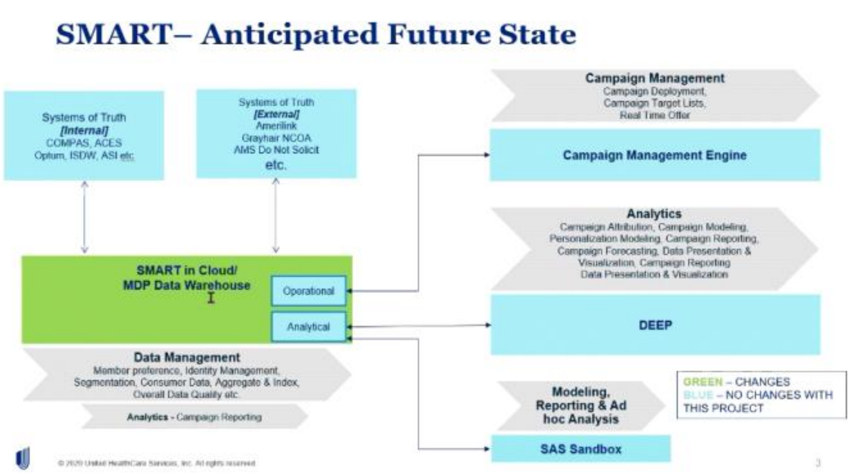
Track Money Movement
Stripe has its own dashboard

Miscellaneous

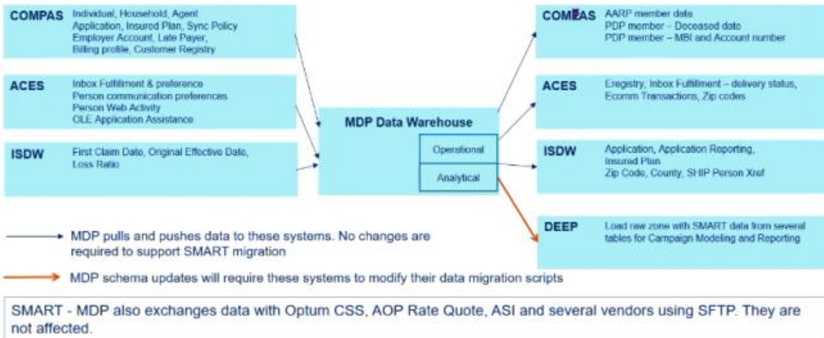
Monday, February 13, 2023 12:15 PM

++

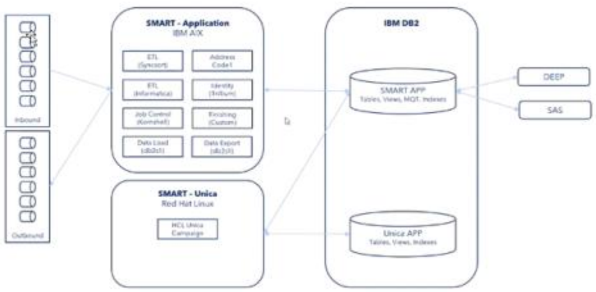




SMART – MDP – System Dependencies

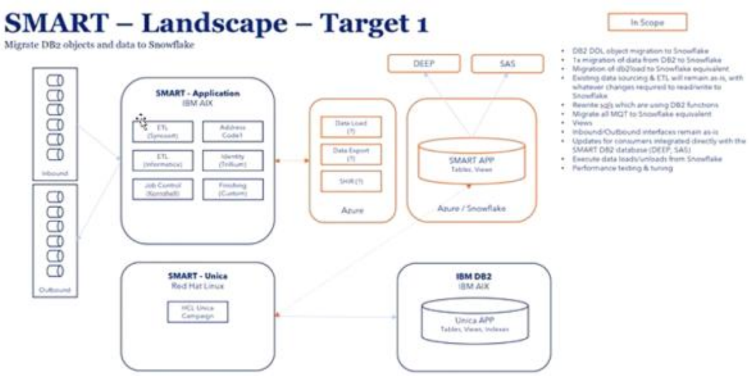


SMART – Landscape – Current



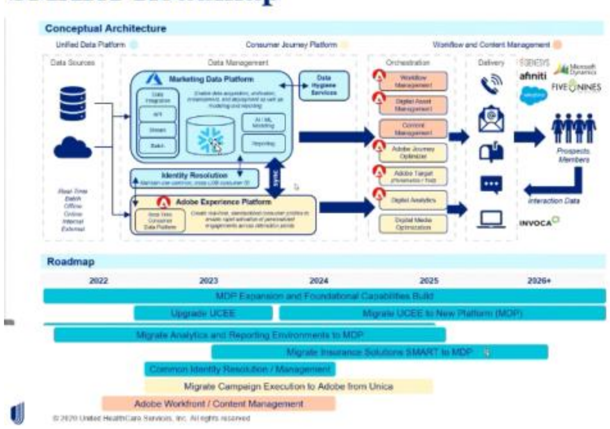
SMART – Landscape – Target 1

Migrate DB2 objects and data to Snowflake

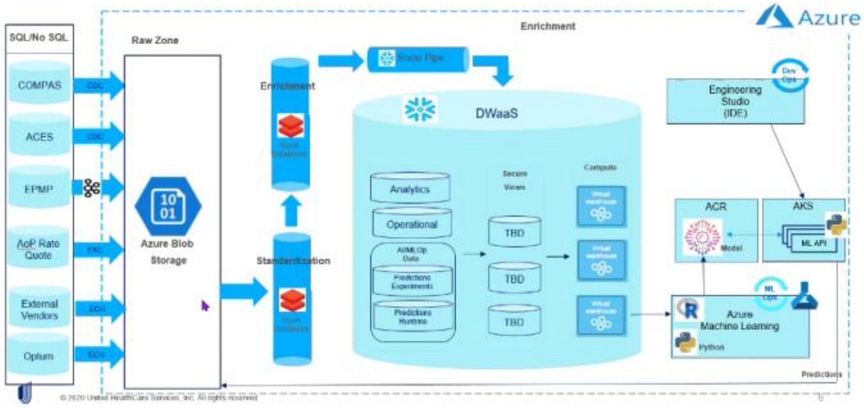


Final Phase:

SMART Roadmap



Detailed Technology Architecture



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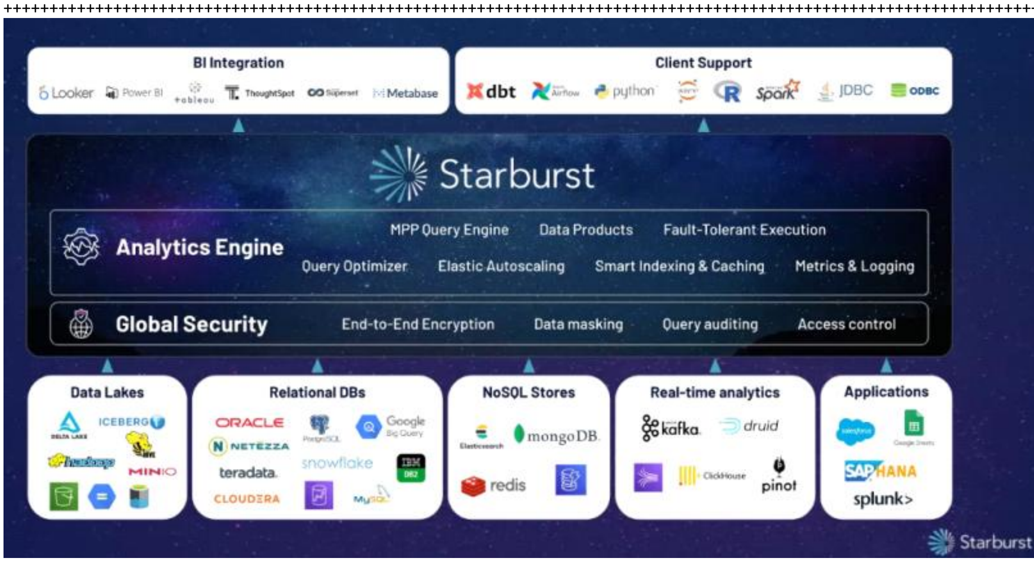
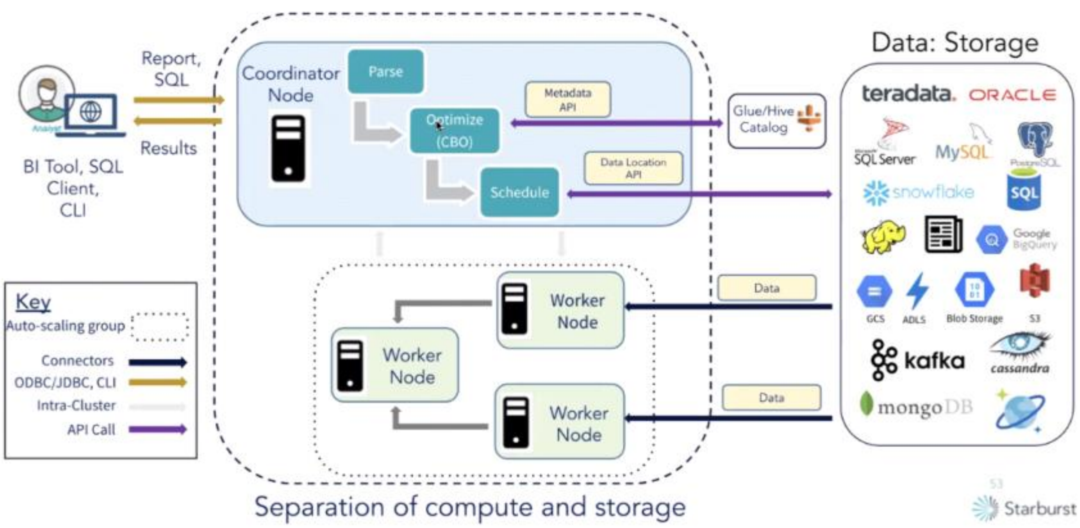
PowerBI recording: https://uhgazure.sharepoint.com/teams/CloudDataServiceOfferingDevelopment/Shared%20Documents/People%20Development/Recordings/Meeting%20in%20_Training%20and%20Development_-20230317_100350-Meeting%20Recording.mp4?web=1

+++

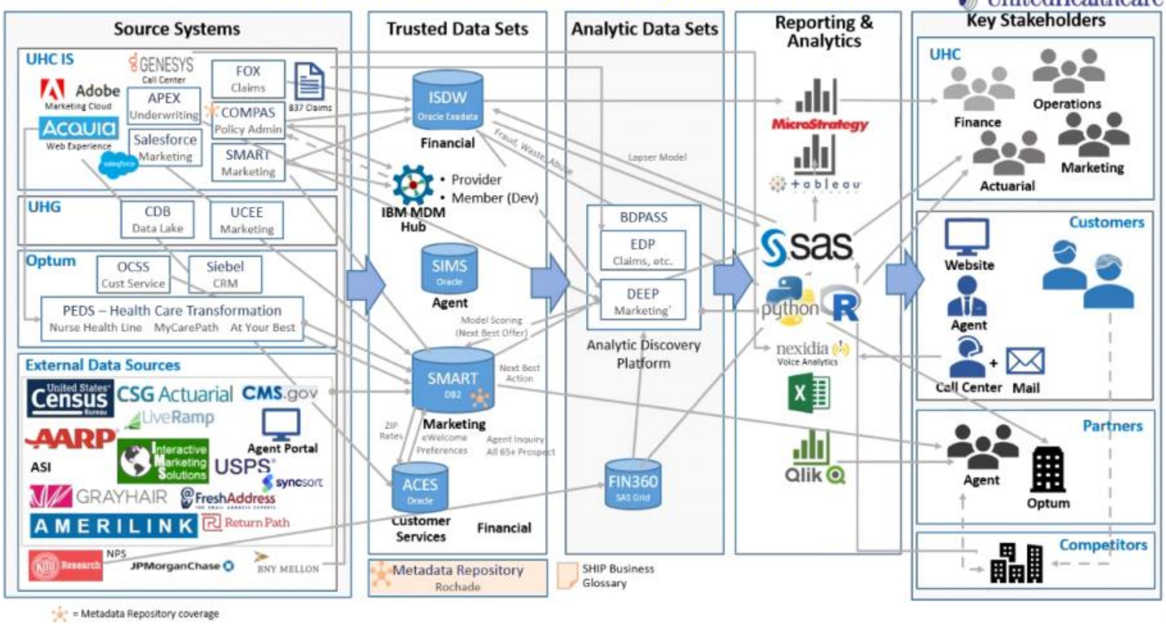


Starburst Enterprise Architecture



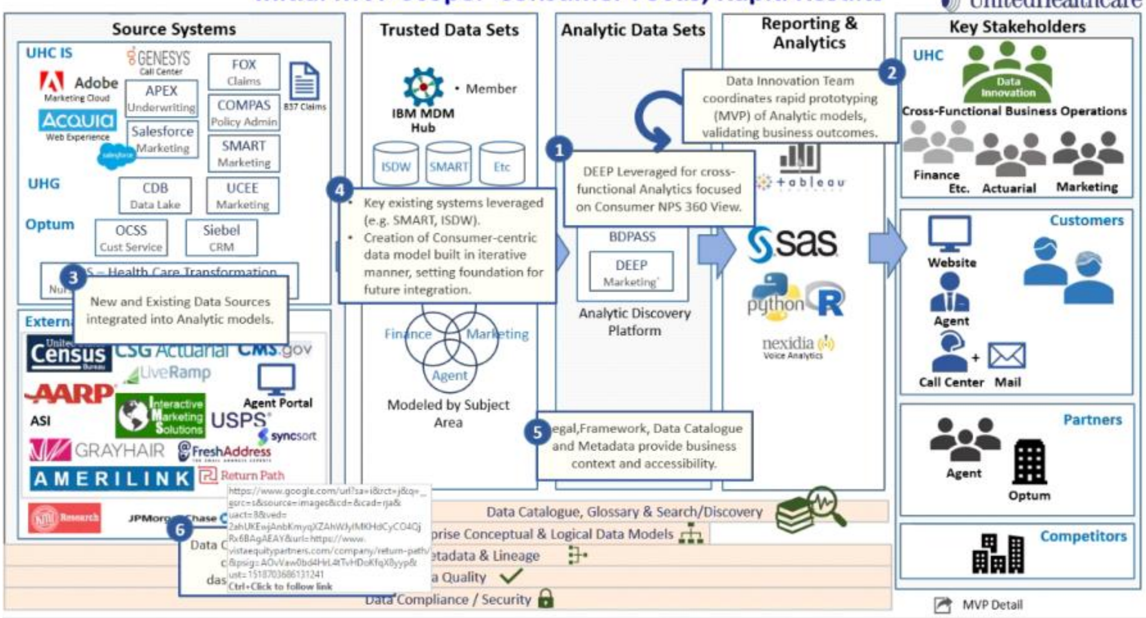
Current State Architecture – High Level Data Flow

UnitedHealthcare

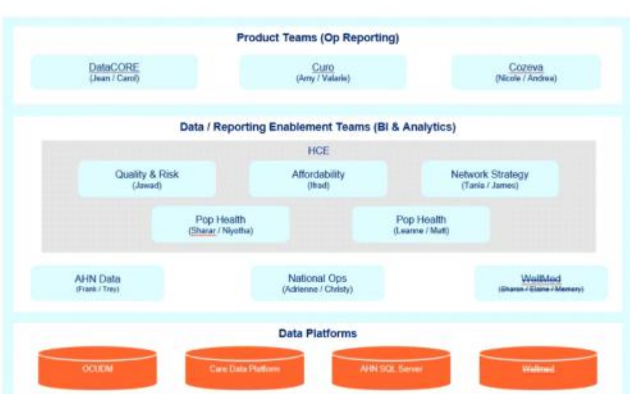


Initial MVP Scope: Consumer Focus, Rapid Results

UnitedHealthcare



Provider-facing analytic product roadmap taskforce



Workstreams

- Product Team
- Reporting Stabilization and Enhancements
- Op Model

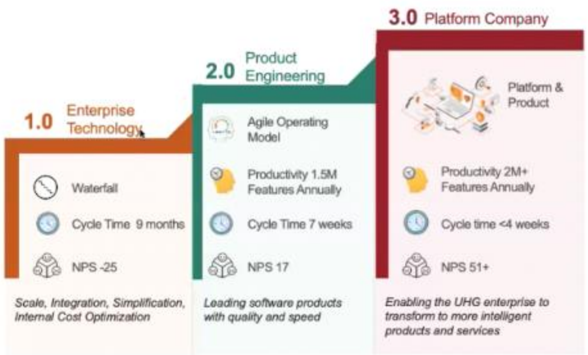
Key Deliverables

Product Team
- Product Roadmap
- Initial Prioritized Backlog

Reporting Standardization and Enhancements
- Tactical Solution Blueprint including Dataflows
- Customer Facing Report Standardization
- Ongoing enhancements to existing capabilities

Op Model
- Proposed Midwest D&A Op Model
- Intake & Demand Management

Optum Technology Evolution



Enterprise Technology (2005 – 2015)
Focused on integrating acquired entities' technology, simplifying the technology landscape, scaling technology to support our growth, securing our environments, and optimizing technology costs by centralizing and decommissioning assets.

Product Engineering (2015 – 2020)
Evolved to a line of business organizational structure, transformed into an agile operating model, and invested in our global engineering workforce increasing development productivity and decreasing time to value (software deployed into production) from 9 months to 7.5 weeks. Created a product-based model that enables interoperability, core data and technology capabilities, global engineering workforce, and line of business operating model.

Platform Company (2020 – 2025+)
Evolving to a platform company that enables the delivery of innovative software business products and digital ecosystem through platform capabilities. Enabling data and AI through the platform to improve the intelligence of our offerings.

What WE think it is

Healthcare Platform (HCP) is the engineering and healthcare essentials which accelerate the development of healthcare applications.

What is Health Care Platform?

I have heard:

"It's a pattern, not software."
"It's Slideware?"
"It's a platform for healthcare data?"
"It's Kafka streaming and topics?"
"It's whatever Dragon is working on!"
"It's our new api's on the public cloud."
"It's our new cloud replacement for the Lake?"

I know:

It is my TOP Priority as defined by James and John.

Mission and Objectives

Mission: To create a consistent programmatic interface for interacting with UHG businesses.

Objectives:

- To enable and accelerate the build out of real-time digital experience for consumers, customers, and partners.
- To make the developer experience faster, easier, and seamless when working across UHG businesses.
- To enable real-time analytics and processing of data changes that enable faster interventions and insights for our members.

Goals

HCP Designed Like an Object Oriented Language

API & Data Access

Java Packages	Healthcare Platform Packages
java.lang.* Object String Thread java.util.* Hashtable Date Vectory Array	uhg.rx.* Script Order Formulary uhg.bank.* uhg.care.* uhg.user.* uhg.security.*

HCP Designed Like an Object Oriented Language

API & Data Access

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HCP First Principles

Use this space for one line subhead if needed | One line

Expectations:

>100ms is **Discouraged.** <20ms is **Preferred.**

Start with most used: **60-40 rule.**

FHIR JSON – Published Schemas

Real-Time, Low Latency, High Scale	Common Naming Convention	Common Security Convention (Au,Az)
Common Documentation & Discovery	Common Telemetry	Common Provisioning : Self Service
No duplication between Packages	Read-Only for v1. CUD can come later.	Self Service Onboarding

90 Day Plan

Use this space for one line subhead if needed | One line

Step 1: June	Step 2: July/August	Step 3: September
First 30 Days • **Stream 1:** Define Packages and Owners • **Stream 2:** Define Conventions, Commonalities • Define API Review Board	Next 45 Days • Define Streams/Topics • Define Restful Objects • Iterate across packages to remove redundancies • Iterate across packages to gain naming consistencies	Last 30 days • Delivery Plan • Schedule/Timeline for Delivery • Capital/People

End of Year Goals – TBD, Due by Sept 1

Use this space for one line subhead if needed | One line

1. Common packages operational and used by first live biz packages.
2. Rx package migrated to use common platform technology.
3. First UHC (payer) package operational.

HCP Designed Like an Object Oriented Language

API & Data Access

Java Packages	Healthcare Platform Packages
java.lang.* Object String Thread java.util.* Hashtable Date Vectory Array	uhg.rx.* Script Order Formulary uhg.bank.* uhg.care.* uhg.user.* uhg.security.*

HCP Stack Diagram

Mission and Objectives

Mission: To create a consistent programmatic interface for interacting with UHG businesses.

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cloud data migration framework

A cloud data migration framework is a set of guidelines and best practices that organizations can follow to successfully migrate their data to the cloud. The framework typically includes the following steps:

1. Planning: The first step is to develop a plan for the migration. This plan should include the following:
- A list of the data that needs to be migrated
- The target cloud environment
- The migration tools and techniques that will be used
- The budget and timeline for the migration
2. Assessment: The next step is to assess the current state of the data. This assessment should include the following:
- The size and complexity of the data
- The data's format and structure
- The data's quality
- The data's security requirements
3. Migration: The migration step is where the data is actually moved to the cloud. This step can be complex and time-consuming, and it's important to have a well-defined plan and a team of experienced professionals to execute it.
4. Testing: Once the data has been migrated, it's important to test it to make sure that it's been migrated correctly and that it's accessible and usable in the cloud environment.
5. Deployment: The final step is to deploy the migrated data into production. This step should include the following:
- Training users on how to access and use the data
- Monitoring the data to make sure that it's performing as expected

Following a cloud data migration framework can help organizations to successfully migrate their data to the cloud and avoid the common pitfalls that can occur during a migration.
Here are some additional tips for successful cloud data migration:

- Start with a small pilot project. This will help you to identify any potential problems and challenges before you migrate your entire data set.
- Use a cloud migration tool. There are a number of cloud migration tools available that can help to automate the migration process and make it more efficient.
- Test the migrated data thoroughly. Once the data has been migrated, it's important to test it to make sure that it's been migrated correctly and that it's accessible and usable in the cloud environment.
- Monitor the migrated data. Once the data has been deployed into production, it's important to monitor it to make sure that it's performing as expected.

++

cloud data migration roadmap

A cloud data migration roadmap is a document that outlines the steps involved in migrating data to the cloud. It should include the following:

- Business objectives: Why is the organization migrating to the cloud? What are the benefits that they hope to achieve?
- Data inventory: A list of all of the data that needs to be migrated, including its size, format, and sensitivity.
- Target cloud environment: The cloud platform that the organization will be using.
- Migration strategy: The approach that will be used to migrate the data, such as lift-and-shift, replatform, or refactor.
- Migration plan: A detailed schedule and budget for the migration.
- Risk assessment: A list of the risks associated with the migration and how they will be mitigated.
- Communication plan: A plan for communicating with stakeholders throughout the migration process.

The cloud data migration roadmap should be a living document that is updated as the migration progresses. It should be used to track progress, identify and mitigate risks, and communicate with stakeholders.
Here are some additional tips for creating a cloud data migration roadmap:

- Involve stakeholders: The cloud data migration roadmap should be developed with input from all stakeholders, including business users, IT staff, and security professionals.
- Get buy-in from senior management: The cloud data migration roadmap should be approved by senior management before it is implemented.
- Start small: Don't try to migrate all of your data to the cloud at once. Start with a small pilot project and then scale up as you gain experience.
- Use a cloud migration tool: There are a number of cloud migration tools available that can help to automate the migration process and make it more efficient.
- Test the migrated data: Once the data has been migrated, it's important to test it to make sure that it's been migrated correctly and that it's accessible and usable in the cloud environment.
- Monitor the migrated data: Once the data has been deployed into production, it's important to monitor it to make sure that it's performing as expected.

By following these tips, you can create a cloud data migration roadmap that will help you to successfully migrate your data to the cloud.

cloud data migration roadmap example

Phase 1: Planning

- Define your goals and objectives. What do you hope to achieve by migrating your data to the cloud?
- Assess your current environment. What data do you have? Where is it stored? How is it being used?
- Develop a migration strategy. This will include choosing a cloud provider, selecting the right migration tools, and developing a migration plan.
- Get buy-in from stakeholders. Make sure everyone who is affected by the migration understands the plan and is on board.

Phase 2: Migration

- Migrate your data. This may be a manual or automated process, depending on the size and complexity of your data.

- Test your migrated data. Make sure that your data is migrated correctly and that it can be accessed and used as expected.
- Deploy your applications and services. Once your data is migrated, you can deploy your applications and services to the cloud.

Phase 3: Testing and Validation

- Test your applications and services. Make sure that your applications and services are working correctly in the cloud.
- Validate your migration. Make sure that your migration was successful and that you have achieved your goals and objectives.

Phase 4: Ongoing Management

- Monitor your cloud environment. Make sure that your cloud environment is performing as expected.
- Manage your cloud costs. Make sure that you are not overpaying for your cloud resources.
- Continually improve your cloud environment. As your business needs change, you may need to make changes to your cloud environment.

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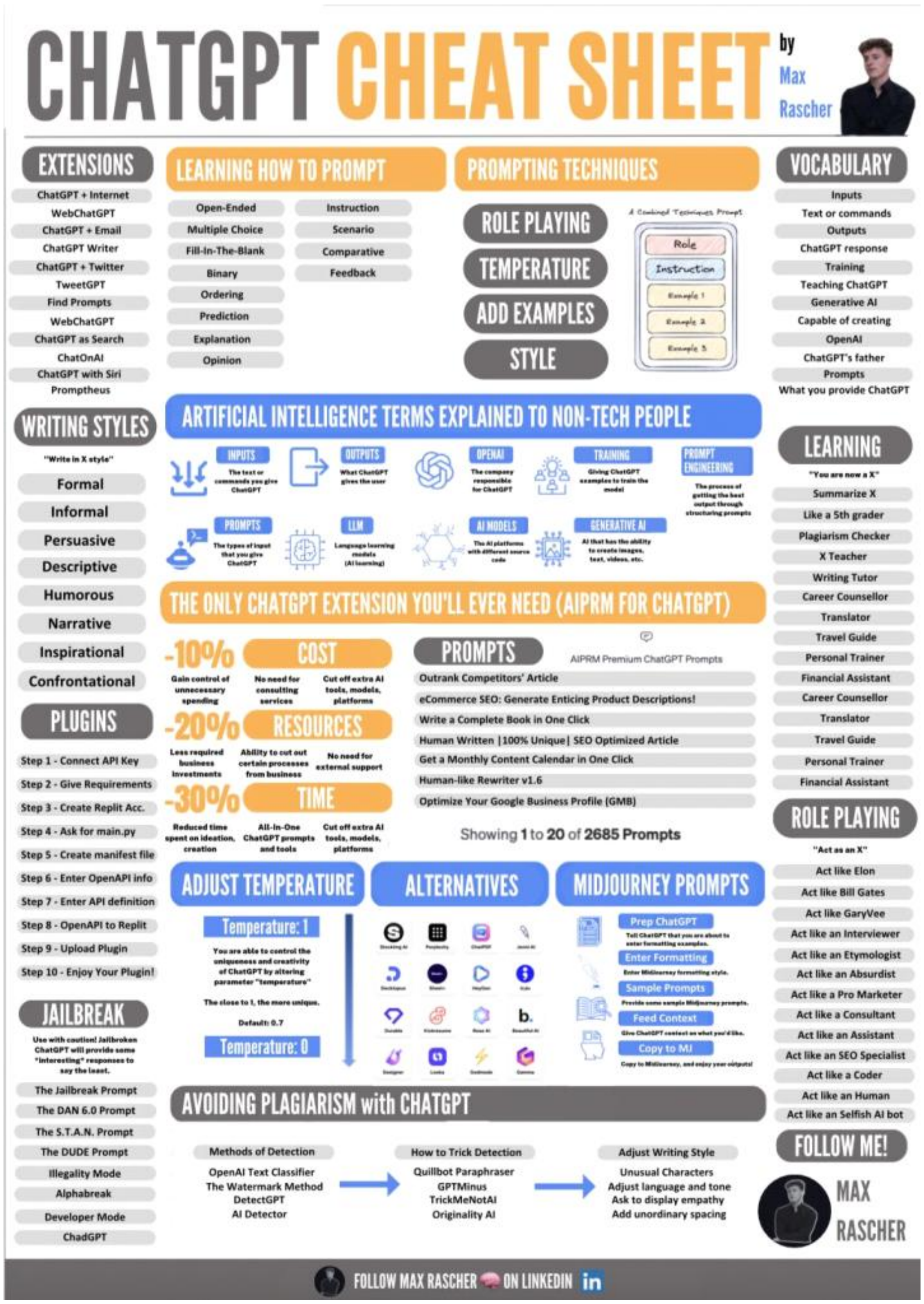

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IPU Consumption Package

Subscription Highlights:

- Cloud Native, Micro-Services Architecture
- All connectors are included
- Ability to choose from a bundle of services
- Flexibility to remix SKUs from the eligible SKU list at any time, up to the total processing units purchased
- Simple calculator and reporting interface provided to support necessary processing unit selection
- Available through the Microsoft, AWS or Google Marketplace

Service	Scaler	Metric	IPU per Unit
Data Integration	Compute Units	Hours	0.16
Cloud Data Integration with Advanced Serverless	Compute Units	Hours	0.28
Cloud Data Integration Elastic	Compute Units	Hours	0.19
Cloud Data Integration Elastic with Advanced Serverless	Compute Units	Hours	0.32
Cloud Data Quality	Compute Units	Hours	0.38
Mass Ingestion Files	Data Volume	GB	0.03
Mass Ingestion Database	Data Volume	GB	0.13
Mass Ingestion Streaming	Data Volume	GB	0.27
Mass Ingestion Applications	Data Volume	GB	0.13
Mass Ingestion Applications – Change Data Capture	Data Volume	GB	6.00
Advanced Pushdown Optimization	Rows Processed	Million Rows	0.048
Change Data Capture - CDI	Rows Processed	Million Rows	6.00
Change Data Capture - DBMI	Rows Processed	Million Rows	17.78
API and App Integration	Compute Units	Hours	1.38
API and App Integration with Advanced Serverless	Compute Units	Hours	2.38
API Management	API Calls	Million Calls	13.33
B2B Gateway	Compute Units	Hours	.28
Integration Hub	Events	Events	.006
Cloud Data Masking	Compute Units	Hours	.37
CDGC - Governance	Assets Stored	1K Assets	0.95
CDGC - Catalog	Assets Stored	100K Assets	0.83
CDGC - Scanner	Compute Units	Hours	0.32
CDGC - Scanner with Advanced Serverless	Compute Units	Hours	0.56
Sandbox/Sub-Org/Production/Pre-release	Per Org	Per org	6.00

Informatica

The Informatica Processing Unit (IPU)

Shift from Static, Component-Based to Dynamic Usage Model

Unit of software licensing capacity that can be used across a **range of cloud services**

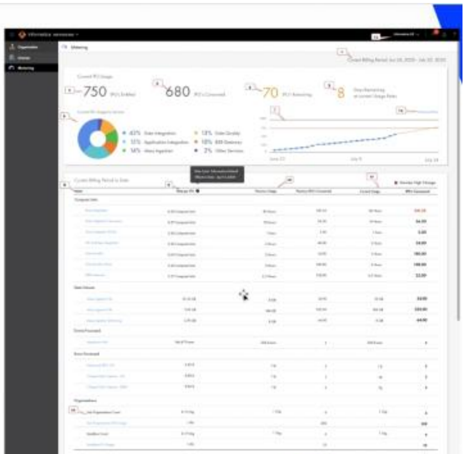
Can be **interchangeably** used across different cloud integration and quality services

IPUs are **a pre-paid currency** and **use any service** up to the pre-paid IPU subscription capacity

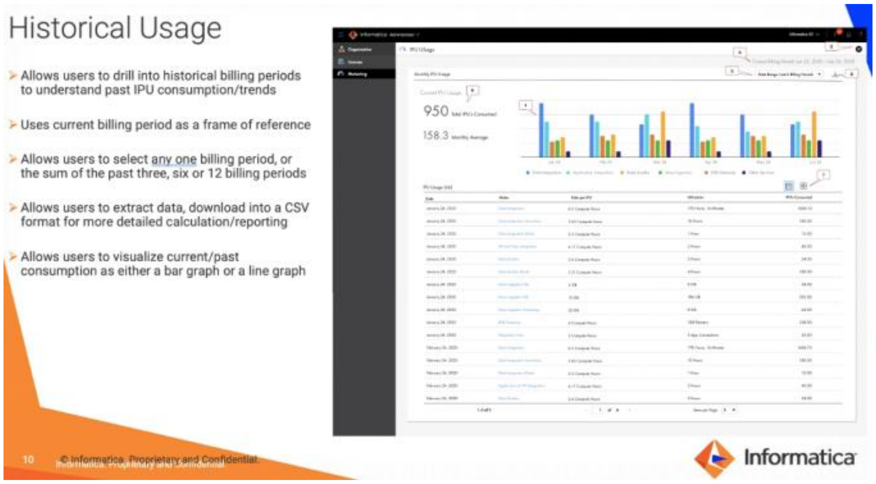
The IPU model offers more value and benefit by granting access to a wider range of services and measuring their use on a consumption basis

Providing native metering for IPU capacity and consumption

- Native dashboard that provides:
  - IPU capacity (per month)
  - IPU consumption (current month and historical months)
  - IPU consumption across production, development and sub-org environments
  - IPU consumption by service (Data Integration, App Integration, so on)
  - IPU's remaining – How many IPUs do I have left in the current month?
  - IPU "burn rate" – Will we make it to the end of the month at our current rate?
  - IPU "rate card" – How do we currently charge IPUs by service?
- Creates visibility for both business and technical users
- Helps organizations track where their IPUs are being burned, and creates opportunities to optimize consumption/value
- Shows where organizations are benefitting from economies of scale, thanks to discounted IPU rates at scale
- Empowers inter-departmental "chargebacks"
- Eliminates any/all surprise compliance issues



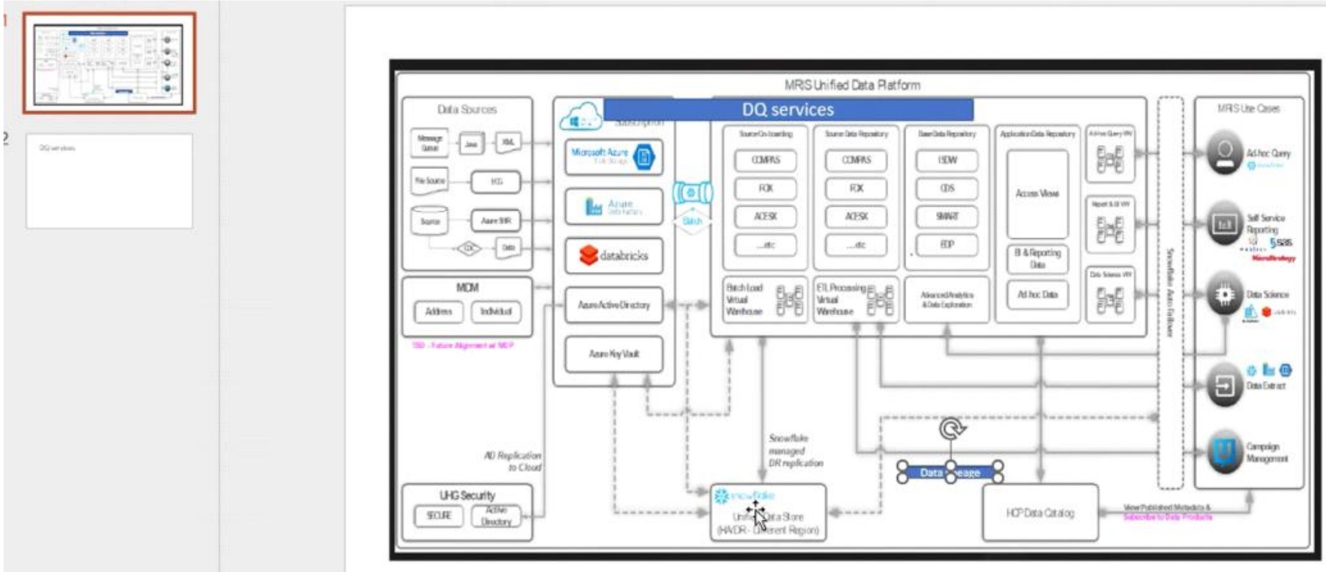
Informatica



Informatica has a cost calculator - 100 IPUs

++

5	DTIP: Member Servicing for Field Agents	Execution (Delivery)
7	UW Question Changes on Apps	Execution (Delivery)
8	NLE Wave 4	Execution (Delivery)
9	2023 Rate and Discount Program	Execution (Delivery)
4	Multi Product Buy[1]up	Execution (Delivery)
10	High Deductible G	Execution (Delivery)
1	Shopping & Education Rollout	Execution (Delivery)
2	DTC OLE 3.0 Redesign	Execution (Delivery)
6	POS UW:POS Manual UW for OLE apps where IRIX Result = Review	Execution (Delivery)
3	Billing and Collections Modernization (CSE)	Execution (Delivery)
13	USA MCO Claims Negotiation	Portfolio Prioritization Review
15	GI & OE: MA/MS Trial and WA Changes	Portfolio Prioritization Review
19	New Legal Entity Wave 5	Idea Identification
12	Innovative Plans[1]	Idea Identification
14	EZ Claim Pay Phase II	Execution (Delivery)
16	Self Service Answers Related to Coverage- Deductible Accumulator[1]	Execution (Delivery)
11	RMO Process Risk Mitigation	Execution (Planning)
17	Provider Web (PWeb) Migration to UHC Provider Portal	Execution (Delivery)
18	Digital Presentation of Letters	Execution (Delivery)
20	Insurance Solutions - EPMP – Integration[1]	Execution (Delivery)
21	Real Time Submission API	Portfolio Prioritization Review
26	Plan Change and Rate Quote Capability Expansion	Idea Expansion
23	POS UW: Incorporate UHC Med Supp Claims for Auto[1]adjudication	Idea Expansion
24	POS UW: Incorporate Prior Applications for Auto[1]adjudication	Idea Expansion
22	SHIP Digital Onboarding Experience- Insured Member Website	Idea Identification
25	Member Portal Message Center/ Secured Email	Portfolio Prioritization Review



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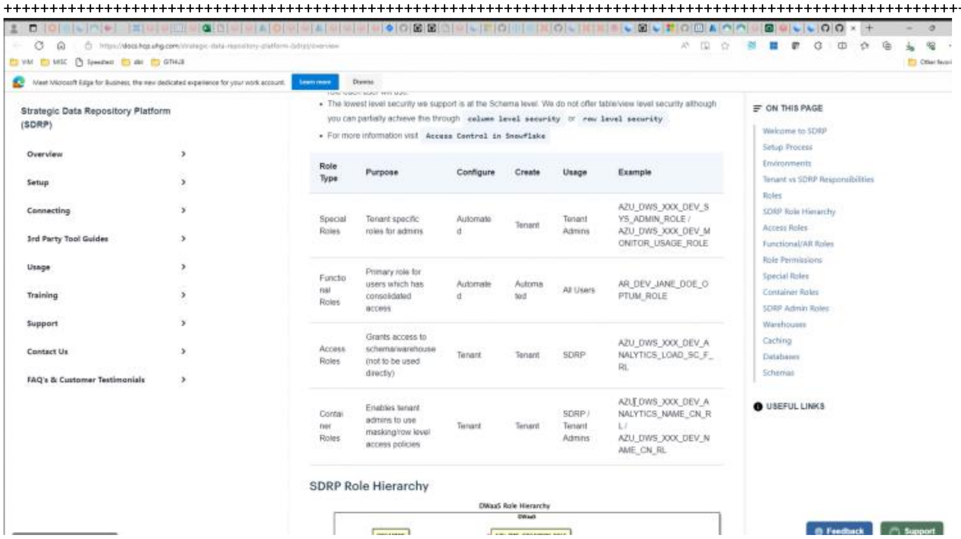


Strategic Data Repository Platform (SDRP)

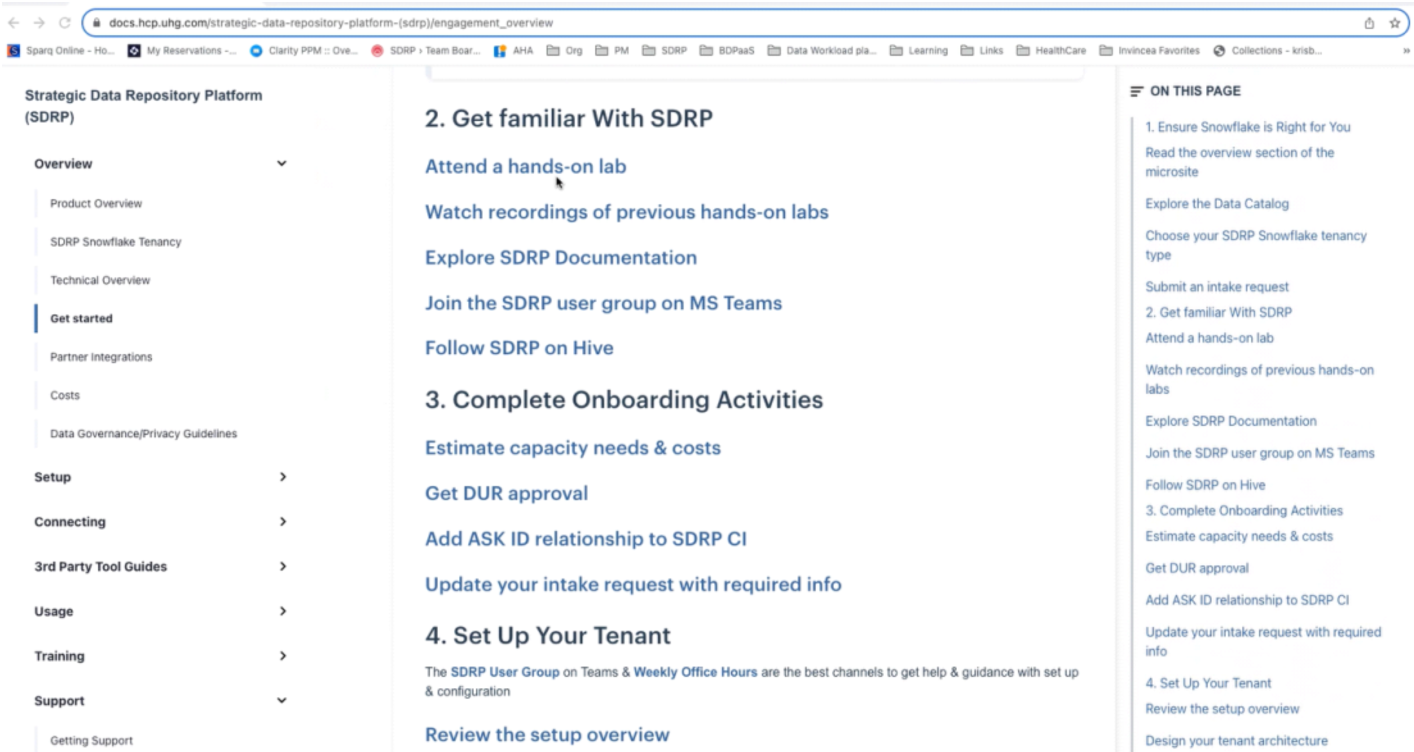
- The lowest level security we support is at the Schema level. We do not offer table/view level security although you can partially achieve this through `column level security` or `row level security`
- For more information visit `Access Control in Snowflake`

Role Type	Purpose	Configure	Create	Usage	Example
Special Roles	Tenant specific roles for admins	Automated	Tenant	Tenant Admins	AZU_DWS_XXX_DEV_SYS_ADMIN_ROLE / AZU_DWS_XXX_DEV_MONITOR_USAGE_ROLE
Functional Roles	Primary role for users which has consolidated access	Automated	Automated	All Users	AR_DEV_JANE_DOE_OPTUM_ROLE
Access Roles	Grants access to schema/warehouse (not to be used directly)	Tenant	Tenant	SDRP	AZU_DWS_XXX_DEV_ANALYTICS_LOAD_SC_F_RL
Container Roles	Enables tenant admins to use masking/row level access policies	Tenant	Tenant	SDRP / Tenant Admins	AZU_DWS_XXX_DEV_ANALYTICS_NAME_CN_RL / AZU_DWS_XXX_DEV_NAME_CN_RL

SDRP Role Hierarchy

SDRP Resources:

https://docs.hcp.uhg.com/strategic-data-repository-platform-(sdrp)/product-overview
https://github.com/optum-eeps/sdrp-support-intake/issues/new/choose
https://docs.hcp.uhg.com/strategic-data-repository-platform-(sdrp)/overview
+++



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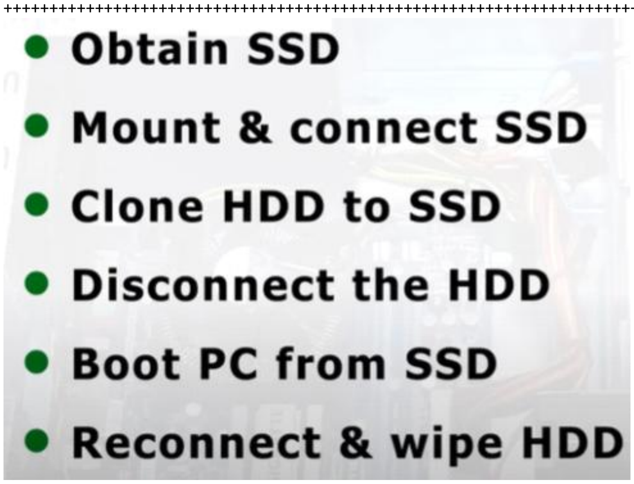
- **02/14/2025 - Topics to discuss:**
  - Doing really well on the RAD Data Modernization Phase 1 - we'll be able to complete the project on planned timeline - 02/28/2025
  - Alex said today that he is nervous about the ECIF funding
  - RAD Treasury Assessment is a significant effort, but I think that might be a good thing for us in the long run
    - Scope it appropriately. Come to consensus.

++

Clone Boot Drive: [Old PC Upgrade #2: SSD Boot Drive]

+++



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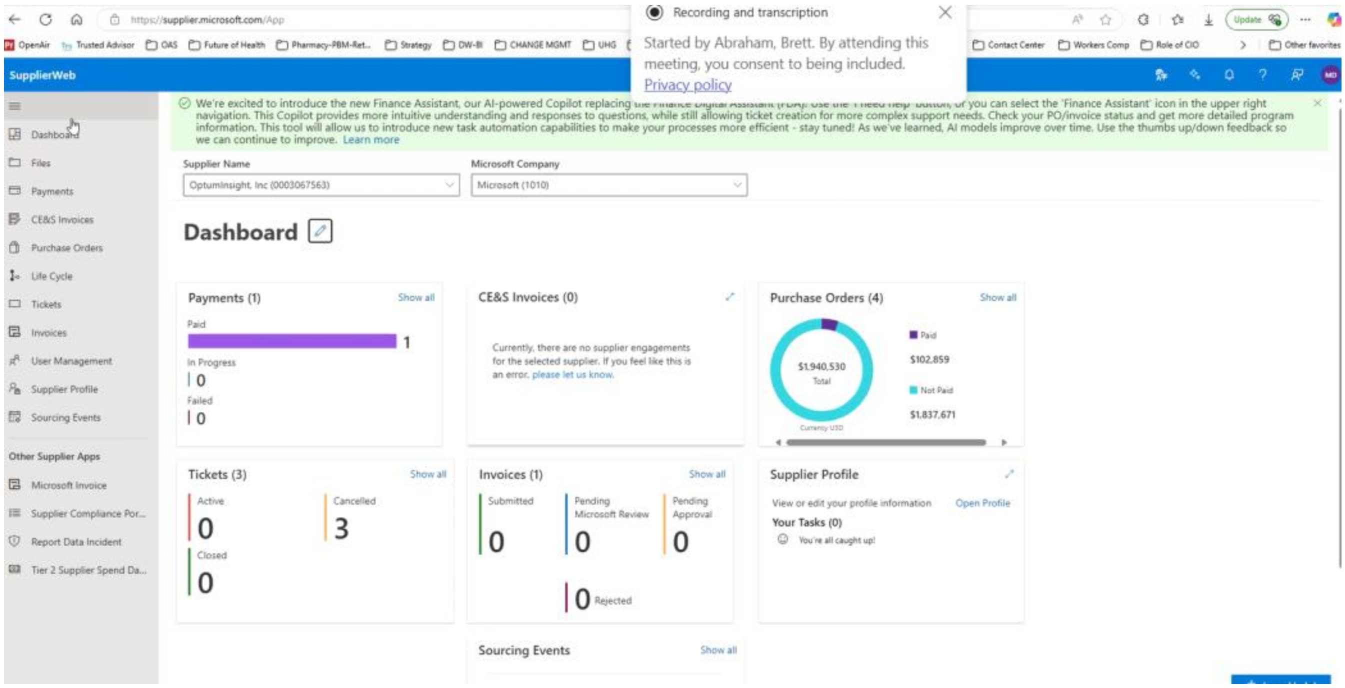
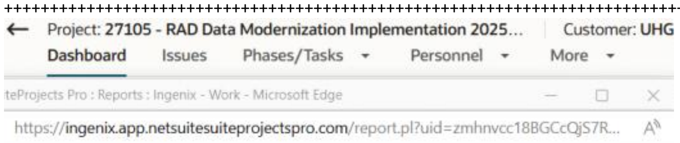




Veekly Companies Report - Timesheets - All hours - PROJ: Hours by task, user (last week) - iltered by: Project (05/12/25 - 05/18/25)

Click here to download 'PROJ: Hours by task, user (last week)' report PivotTable file to Microsoft Excel. (As a CSV formatted file)

Clear sort

▾ show all ▸ hide all re-run report

Task/User	Week starting 05/12/25	Total
▾ Consulting	48.50	48.50
Sahoo, Asit K	48.50	48.50
1 row (1 sub-rows)	48.50	48.50

ienerated on: 05/20/25 05:23 PM

Project: **RAD Data Modernization - MSFT ECIF Implemen…** | Customer: **Microsoft C.**

Dashboard Issues Phases/Tasks ▾ Personnel ▾ More ▾

SuiteProjects Pro : Reports : Ingenix - Work - Microsoft Edge

https://ingenix.app.netsuitesuiteprojectspro.com/report.pl?uid=zmhnvcc18BGCcQjS7R...

Weekly Companies Report - Timesheets - All hours - PROJ: Hours by task, user (last week) - Filtered by: Project (05/12/25 - 05/18/25)

Click here to download 'PROJ: Hours by task, user (last week)' report PivotTable file to Microsoft Excel. (As a CSV formatted file)

Clear sort

show all hide all re-run report

Task/User	Week starting 05/12/25	Total
Consulting	196.50	196.50
Malhotra, Dinesh	3.00	3.00
Cheema, Dave S	3.00	3.00
Khurana, Preeti	20.00	20.00
Baig, Muquaddar	42.50	42.50
Pal, Sujit	42.50	42.50
Sahoo, Asit K	51.50	51.50
Kumar, Mahesh	34.00	34.00
1 row (7 sub-rows)	196.50	196.50

++

Dave is not meeting performance expectations. Specifically, Dave was responsible for executing on a Solution Blueprint assessment project for RAD Treasury. During the project, our direct client received feedback from their customer leader (VP) that Dave was repeatedly asking for the same information in multiple meetings. Input from 1) our client's customer and 2) our client are as follows:

1) Feedback from the Client's Customer is as follows:

* Ineffective Meeting Management: Despite advice to meet with each team individually, set up recurring meetings with mixed teams, leading to confusion and inefficiency. Frequently asked the wrong audience for information, such as discussing PeopleSoft or ePAM with Quantum contacts, causing further confusion and frustration.
* Lack of Retention and Understanding: Dave has failed to document information provided by teams and often does not understand the data sources and systems, leading to repeated requests for the same information.
* Inadequate Data Management: We have data ready for him, but he has not provided a landing site for new data transmissions, hindering our progress.

The above has led to frustration by the client customer teams and a request from them to remove Dave from the project.

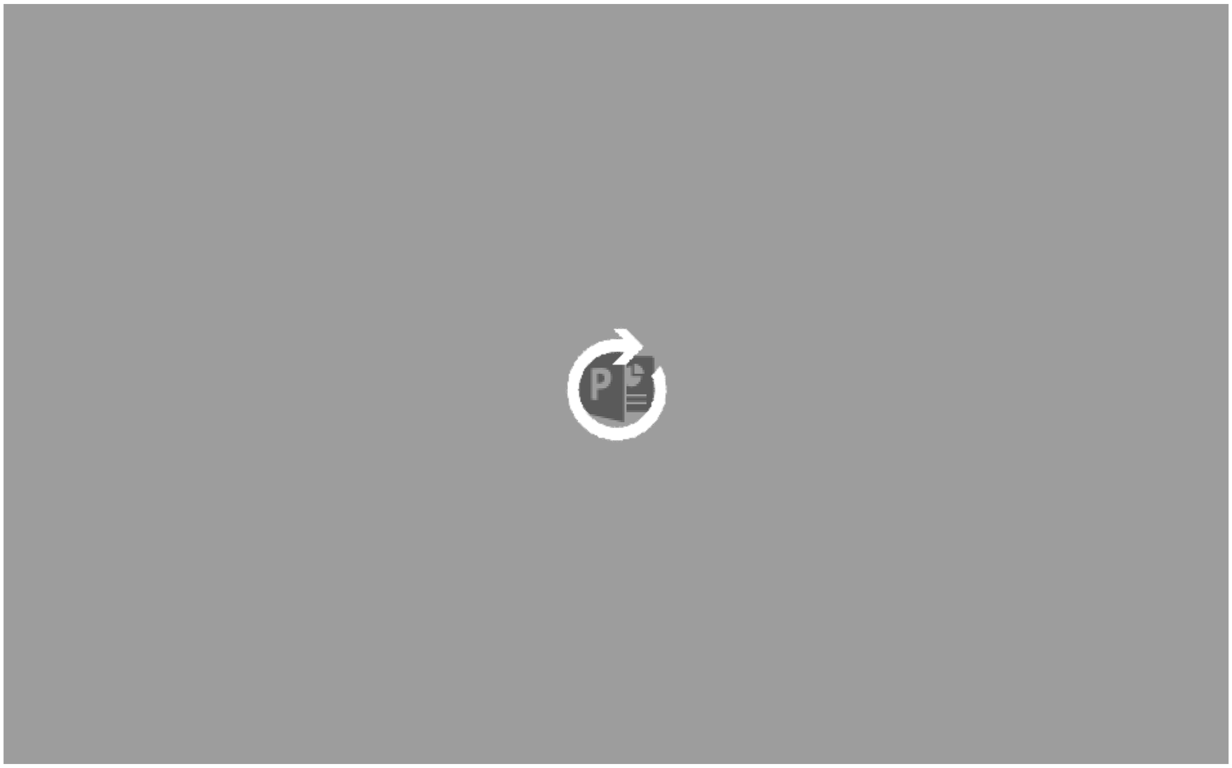
2) Feedback from the our direct client

* Way off the mark for a deliverable
* Dave doesn't understand what treasury is doing
* Over-estimated the complexity – these data and reports are not that complex
* Can't just make assumptions and not get to air-tight scope
* Continues to get systems confused
* Quantum coming from People Soft – wrong
* Complexity of things un-related to source data
* Dave didn't scope the work
* Didn't operate as a Director and pushed hard enough to get the source files
* Have made things more embarrassing (for us) to go back to client and ask for the same data again

Common Review - Feedback

Friday, February 17, 2023 9:13 AM

URL: [Optum - Data Mesh v1.1]



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Favorites ▾ | Main Menu ▾ > Self Service ▾ > MAP ▾ > View Manager Evaluations

Performance Evaluation

BALDEV CHEEMA

Below is the performance evaluation your manager submitted for your recent Common Review. You and your manager should have a discussion about the evaluation to review your past performance and make plans for the coming year. If you have not yet done so, contact your manager to arrange for the discussion.

At the bottom of this page you will find an Employee Comments section to enter comments you wish to make about the performance evaluation. Any comments you enter will be stored as part of your evaluation. Click the "Submit" button to save the comments. If you have questions, contact Employee Center.

Note: Do NOT use your browser's "Back" button to navigate among screens in Employee Center Self Service. To move to a previous screen in MAP, use the navigation links at the top or bottom of each page.

*Review Type: Common Review
*Date: 02/26/2023

Printable Form

Click here for instructions on how to email this review

THE SELF SERVICE APPLICATION HAS A 30 MINUTE TIME-OUT LIMIT. Use "Save as Draft" often to save your work.
If you do not see the "Save Confirmation" message after clicking on "Save as Draft," please paste your changes into

Printable Form

Click here for instructions on how to email this review

THE SELF SERVICE APPLICATION HAS A 30 MINUTE TIME-OUT LIMIT. Use "Save as Draft" often to save your work. If you do not see the "Save Confirmation" message after clicking on "Save as Draft," please paste your changes into another document and restart your session. Changes only save when the "Save Confirmation" message appears.

* Required Field

Performance Summary

Hide All Business Goal Descriptions and Comments

Business Goals - What did the employee achieve?

Title: **Goal Category** Fundamental Execution

Delivery execution and reusable knowledge creation

*Rating

Marginal 1	-- 2	Effective 3	-- 4	Outstanding 5
○	○	○	◉	○

Find Number of entries displayed 1 of 1

Maximum of 6 total Individual Business Goals

Evaluation Summary

*Overall Rating

Needs Improvement **Meets Expectations** **Exceeds Expectations**

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scalability, data ingestion architecture (for CDOs and Cozeva). His customer has always been pleased with his c that had resulted in multiple extensions over last couple of years.

Going forward, Dave should proactively seek opportunities to strike a balance between client delivery, business d and practice development to successfully meet his MBOs. Diversity of platform architecture experience form Car present opportunities to author white papers / PoVs to further enhance his personal brand. Diverse network of st he has interacted with over last 3 years present an opportunity to expand his relationship network to stay close to priorities of those stakeholders.

Employee Comments

In the space below, enter any comments you wish to make about this performance evaluation. Any comments you enter will be permar the evaluation. Be sure to click the "Submit" button to save your comments. You may enter or edit comments for 60 days after the clo Review cycle. If you have any questions, please contact Employee Center at 1-800-561-0861.

Agreement Date: 02/16/2023 Verify Date Click this button to verify that your manager has set this date for your performance review discussion.

Submit Printable Form

Click here for instructions on how to email this review

Cancel

Submit Printable Form

Click here for instructions on how to email this review

Cancel

Return to Select Review

Snowflake > SnowPark > Python

Thursday, March 16, 2023 3:28 PM

The latest technology on Data Engineering Pipelines with Snowpark Python:
https://quickstarts.snowflake.com/guide/data_engineering_pipelines_with_snowpark_python/index.html?index=..%2F..index#0

Dynamic Tables: Delivering Declarative Streaming Data Pipelines with Snowflake
Dynamic Tables: Delivering Declarative Streaming Data Pipelines with Snowflake
In this blog post, we'll cover the background of modern data architectures, why we built Dynamic Tables, and how their usage can enable you to rethink data pipelines.

Atlantis Candidates

Thursday, July 6, 2023 12:26 PM

Client is using this internal rating system during interviews.

Please find the below feedback..

Tech Skills Rating:
AZURE ECOSYSTEM(OVERALL) – 2/10
ADF - 2/10
DATABRICKS - 3/10
ADLS- 3/10
PYTHON/PYSPARK - 1/10
SCALA - 2/10
AIRFLOW - No hands on
CICD- Not asked
QUALITYGATE-SECURITY/VULNERABILITIES - Not asked
COMMUNICATION :- 7/10

++

TA Thangasamy, Arul David <arul.thangasamy@optum.com>
To: Ramamoorthy, Senthilkumar; Riffle, Pamela K; Cc: Surendran, Sathishkumar

Internal

Retention: UHGInbox Expires: 10/24/2023.

Hi Sen/Pam,
Please find below our feedback.

Tech Skills Rating:
AZURE ECOSYSTEM(OVERALL) – 3/10 (Very generic answers for the use cases)
ADF - 3/10
DATABRICKS - 4/10
ADLS- 4/10
PYTHON/PYSPARK - 3/10 (he was not able to write the snippet)
AIRFLOW - Not asked

CICD- Not asked
COMMUNICATION :- 8/10

Skill Levels client is looking at:
SKILL LEVEL RATING (1-10, 10 being the highest in proficiency)

PYTHON/PYSPARK	7/10
SCALA	7/10
DATABRICKS	7/10
ADF (Orchestration)	7/10
COMMUNICATION	7/10
AZURE ECOSYSTEM(General Exposure)	5/10
ADLS (should be part of Azure)	5/10

AIRFLOW (Nice to have)	3 /10
CICD (General Exposure, not SME)	3 /10
QUALITYGATE-SECURITY/VULNERABILITIES	3 /10

Exposure to scans, security issues/coding standards, and remediation

What are specific of role requirements - architect, deep techie/hands-on, program manager, etc.?
What do they want the candidate to do?

Job Description
Job description for the 12 onshore engineering resources.

Our team provides Analytic Application development and support, Business Intelligence Solutions, Custom Reporting, and Consulting for Optum Payment Integrity. We provide data analytic development services that identify overpayments or recoveries for Data Mining, Coordination of Benefits (COB), Fraud Waste Abuse and Error (FWAE), and Subrogation. This position will develop new analytics, enhance existing analytics, and maintain and improve the applications that support these analytics using bigdata tools, Azure, Pyspark, SCALA technology stack.	Responsibilities: • Design, code, test, document, and maintain high-quality and scalable Big Data, Cloud solutions • Design, develop and implement analytics rules engines • Research, evaluate, and deploy new tools, frameworks, and patterns to build sustainable Big Data platform • Identify gaps and opportunities for improvement of existing solutions • Define and develop APIs for integration with various data sources in the enterprise • Analyze and define customer requirements • Assist in defining product technical architecture • Make accurate development effort estimates to assist management in project and resource planning • Create prototypes, proof-of-concepts & design and code reviews • Collaborate with management, quality assurance, architecture, and other development teams • Write technical documentation and participate in production support • Keep skills up to date through ongoing self-directed training	Requirements: • Bachelor's degree • 12+ years of IT-related work experience • 8+ years' experience in hands-on software development • **3+ years' experience in development using SCALA Spark** or Pyspark • 3+ years' experience in Azure cloud platform • 2+ years' in Bigdata tools, like Hadoop, MapReduce, HDFS, Spark, Kafka Streaming, Docker, and/or Kubernetes • 2+ years' experience in MySQL and NoSQL databases, Deltalake, Snowflake • 2+ years' experience with Agile/Scrum methodology and best practices • 1+ years' experience in scheduling tools, such as ADF/Airflow Preferences: • Data analysis experience • Functional testing experience • Healthcare industry experience • Understanding of SOA (service-oriented architecture) concepts • Excellent analysis, process, problem solving and critical thinking skills

Lead Analytics Engineer questions:

- **Technical skills:**
  - What are your skills in data modeling, data warehousing, and data mining?
  - What programming languages do you know?
  - What are your experiences with big data platforms?
  - What are your experiences with cloud computing platforms?
- **Problem-solving skills:**
  - How would you go about troubleshooting a problem with a data processing system?
  - How would you identify and solve a data quality issue?

- How would you design a data pipeline for a large-scale data project?
- **Communication skills:**
  - How would you communicate the results of your analysis to non-technical stakeholders?
  - How would you work with a team of data scientists and engineers to build a data-driven product?
- **Leadership skills:**
  - How would you mentor and develop junior data engineers?
  - How would you set and manage expectations for data projects?
  - How would you build a culture of data-driven decision-making in your team?

Additional areas:

- Which data platforms and tools have you worked on?
- Problem-solving process and how you would approach different data challenges?
- How do you communicate your ideas clearly and concisely, both to technical and non-technical folks?
- Your leadership style and ability to mentor and develop junior data engineers?

++

Azure

- What is cloud computing?
- What are the different types of cloud deployment models?

  public, private, community, and hybrid
- What are the four parts of the Microsoft Azure platform?

  compute, analytics, storage and networking
- What is Azure Resource Manager?

  management layer that enables you to create, update, and delete **resources** in your **Azure** account
- What are the different types of Azure services?

  infrastructure as a service (IaaS), software as a service (SaaS), platform as a service (PaaS), and a serverless model.
- What are the benefits of using Azure?
- What are some of the challenges of using Azure?
  - Large and Complex Migrations, complex Integrations, Unusual Uses and Applications, Administration and Monitoring, Application Modernization
- What are some of the best practices for using Azure?
  - Use Multiple Authentication, Secure Administrator Access, Microsoft Azure Security Center, Secure Networking, Monitor Activity Log Alerts, Key Management, Secure Storage.
- What are some of the most popular Azure applications?

  Running virtual machines or containers in the cloud
- What are some of the most popular Azure tools?

  Here are some additional questions that you may be asked, depending on your experience level and the role you are applying for:
- Can you describe the different types of Azure storage?
- How would you implement a disaster recovery plan for an Azure application?

  make on-demand custom backups or utilize automatic backups
- How would you monitor an Azure application?
- How would you scale an Azure application?
  1. Minimum Instance: The number of instances in your scale set that you intend to deploy.
  2. Maximum Instances: When scaling out, this is the maximum number of instances you want to deploy. ...
  3. Metric-based: It monitors application demand and adds or removes virtual machines as needed
- How would you secure an Azure application?

  Use Azure DDoS protection and a web application firewall or deploy Azure Front Door along with a web application firewall.

++

ADLS

- What is Azure Data Lake Storage?
- What are the benefits of using ADLS?
- What are the different types of ADLS?
- What are the limitations of ADLS?
- How do you secure ADLS?
- How do you manage ADL
- How do you troubleshoot ADLS?
- What are the best practices for using ADLS?
- What are the future trends for ADLS?

  Here are some additional questions that you may be asked, depending on your specific experience and role:
- Can you explain the difference between ADLS and Azure Blob Storage?
- Can you discuss the different ways to access ADLS data?
- Can you describe the different types of jobs that can be run on ADLS?
- Can you talk about the different ways to monitor ADLS performance?
- Can you discuss the different ways to scale ADLS?

++

Spark Analytics

- What is **Apache Spark**?
- What is PySpark and what is the difference between the two?
- What are the key features of Spark?
- How is Spark different from MapReduce?
- What is RDD?
- What are the different types of Spark applications?
- How does Spark run applications?
- What is Spark Streaming?
- What are the different deployment modes for Spark?
- What are the different persistence levels in Spark?
- What are the different types of operators provided by the Apache GraphX library?
- What are some of the best practices for using Spark?

Additional Info:

- Basics of Spark, including its architecture, features, and applications?
- How Spark can be used to solve real-world problems?
- What are the different Spark libraries, such as Spark SQL, Spark MLlib, and Spark GraphX.
- What are the benefits of using Spark over other big data processing frameworks?

++

Scala Analytics

- What are the main features of Scala that make it suitable for analytics?
- What are some of the frameworks that Scala supports for analytics?
- How would you use Scala to perform a simple data analysis task?
- What are some of the challenges of using Scala for analytics?
- How would you compare Scala to other languages for analytics?
- What are some of the best practices for writing Scala code for analytics?
- What are some of the open source projects that use Scala for analytics?

Additional Info:

- Can you discuss Scala syntax, features, and libraries?
- How do you approach to write analytics tasks?
- Which frameworks Scala supports for analytics?
- Your experience with Scala and analytics

Tools/Processes and Analytics

Monday, July 10, 2023 11:17 PM

Data Modeling

Data modeling is the process of creating a **visual representation of data, its relationships, and its meaning**. It is a critical part of the data lifecycle, as it helps to ensure that data is accurate, consistent, and easy to use.

There are three main types of data modeling:

- **Conceptual data modeling** is the highest level of data modeling, and it focuses on the **overall structure of the data**. This type of modeling is used to create a high-level overview of the data, and it is not concerned with the details of how the data is stored.
- **Logical data modeling** is a lower level of data modeling, and it focuses on the specific data elements and their relationships. This type of modeling is used to create a more detailed representation of the data, and it is used to define the data structures that will be used to store the data.
- **Physical data modeling** is the lowest level of data modeling, and it focuses on the physical storage of the data. This type of modeling is used to create the database schema, which is the blueprint for how the data will be stored in the database.

The data modeling process typically involves the following steps:

1. **Gathering requirements**. The first step is to gather requirements from the business stakeholders. This includes understanding the business needs, the data sources, and the desired outcomes of the data modeling project.
2. **Data analysis**. Once the requirements have been gathered, the next step is to analyze the data. This includes understanding the data elements, their relationships, and their meaning.
3. **Data modeling**. The third step is to create the data model. This involves using a data modeling language to create a visual representation of the data.
4. **Data validation**. The fourth step is to validate the data model. This includes checking the model for accuracy, consistency, and completeness.
5. **Deployment**. The final step is to deploy the data model. This involves creating the database schema and loading the data into the database.

Data modeling is a complex process, but it is essential for the effective management of data. By following the steps outlined above, you can create a data model that will help you to achieve your business goals.

Here are some of the benefits of data modeling:

- **Improved data accuracy**. Data modeling can help to improve the accuracy of data by ensuring that the data is consistent and well-defined.
- **Increased data consistency**. Data modeling can help to increase the consistency of data by ensuring that the data is stored in a standardized format.
- **Enhanced data usability**. Data modeling can help to enhance the usability of data by creating a visual representation of the data that is easy to understand and use.
- **Improved data security**. Data modeling can help to improve the security of data by ensuring that the data is stored in a secure environment.

++

Data warehouse data models

Data warehouse data models are the **blueprints for how data is stored** in a data warehouse. They define the relationships between different data elements, and they help to ensure that the data is organized in a way that is efficient and easy to query.

There are two main types of data warehouse data models:

- **Dimensional modeling** is a **bottom-up approach** to data modeling that focuses on creating **fact tables and dimension tables**. Fact tables store the key metrics of a business, such as sales or revenue. Dimension tables store the attributes that describe the data in the fact tables, such as product names or customer demographics.
- **Entity-relationship modeling** is a **top-down approach** to data modeling that focuses on **creating entities and relationships** between them. Entities represent real-world objects, such as customers or products. Relationships define the connections between entities, such as which customers purchased which products.

Both dimensional modeling and entity-relationship modeling have their own advantages and disadvantages. **Dimensional modeling is typically easier to understand and query, but it can be more difficult to implement**. **Entity-relationship modeling is more complex, but it can be more flexible and scalable**.

The best data warehouse data model for a particular application will depend on the specific needs of the business. However, both dimensional modeling and entity-relationship modeling are valuable tools for data warehousing.

Here are some of the most common data warehouse data models:

- **Star schema** is a type of **dimensional model** that is composed of a fact table and a set of dimension tables. The fact table stores the key metrics of a business, and the dimension tables store the attributes that describe the data in the fact table.
- **Snowflake schema** is a type of **dimensional model that is similar to a star schema, but it has a more complex structure**. The snowflake schema has **multiple levels of dimension tables**, which allows for more granular data analysis.
- **Kimball schema** is a type of dimensional model that is named after Ralph Kimball, who is one of the pioneers of data warehousing. The Kimball schema is based on the idea of conformed dimensions, which are **dimension tables that are shared across different fact tables**.

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Analytics

Analytics is the systematic **computational analysis of data or statistics**. It is used for the discovery, interpretation, and communication of meaningful patterns in data. It also entails applying data patterns toward effective decision-making.

Analytics is a broad field that encompasses many different types of analysis, including:

- **Descriptive analytics:** This type of analysis describes **what has happened in the past**. It can be used to identify trends, patterns, and outliers.
- **Diagnostic analytics:** This type of analysis helps you understand **why something happened**. It can be used to identify the root causes of problems or to understand the factors that contribute to success.
- **Predictive analytics:** This type of analysis predicts **what might happen in the future**. It can be used to forecast demand, identify risks, or optimize decision-making.
- **Prescriptive analytics:** This type of analysis provides **recommendations for what to do**. It can be used to optimize processes, allocate resources, or make strategic decisions.

Analytics can be used in a wide variety of industries, including:

- **Marketing:** Analytics can be used to track website traffic, measure the effectiveness of marketing campaigns, and identify target audiences.
- **Sales:** Analytics can be used to track sales leads, forecast sales, and identify opportunities.
- **Customer service:** Analytics can be used to track customer satisfaction, identify customer pain points, and improve customer service processes.
- **Finance:** Analytics can be used to track financial performance, identify risks, and make investment decisions.
- **Operations:** Analytics can be used to track operational performance, identify inefficiencies, and optimize processes.

Analytics is a powerful tool that can help you make better decisions, improve your business, and achieve your goals. If you're not already using analytics, I encourage you to learn more about it and start using it in your business.

Here are some examples of analytics:

- **Google Analytics:** Google Analytics is a **web analytics** service that tracks website traffic and provides insights into how visitors interact with your website.
- **Salesforce Analytics:** Salesforce Analytics is a **business intelligence platform** that helps you **analyze your sales data** to identify trends, patterns, and opportunities.
- **Tableau:** Tableau is a data visualization software that helps you **create interactive dashboards and reports** to communicate your data insights.

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Data Governance

Data governance is a **set of principles and practices** that ensure high-quality data throughout the data lifecycle. It encompasses the people, processes, and information technology required to create a **consistent and proper handling of an organization's data** across the business enterprise.

Data governance is important because it helps organizations to:

- **Ensure the quality and accuracy of data.** This is essential for making informed decisions, complying with regulations, and building trust with customers.
- **Protect the privacy and security of data.** This is a critical issue in today's world, where data is increasingly being used for malicious purposes.
- **Make data more accessible and usable.** This can help organizations to improve their efficiency and productivity.

- **Comply with regulations.** Many industries are subject to strict data regulations, and data governance can help organizations to demonstrate compliance.

There are many different aspects to data governance, but some of the key components include:

- **Data policies and standards.** These define the rules and guidelines for how data is to be managed.
- **Data ownership and responsibility.** This clarifies who is responsible for different aspects of data management.
- **Data security and privacy.** This ensures that data is protected from unauthorized access, use, or disclosure.
- **Data access and usage.** This defines who can access what data and for what purposes.
- **Data quality and accuracy.** This ensures that data is accurate and up-to-date.

Data governance is an ongoing process that requires regular assessment and improvement. However, the benefits of data governance can be significant, and organizations that implement effective data governance programs can gain a competitive advantage.

Here are some examples of data governance:

- **Defining the master data model.** This is a blueprint for all of the data that an organization collects and uses. It defines the data elements, their relationships, and the rules for how they can be used.
- **Establishing data retention policies.** This defines how long different types of data should be kept. This is important for compliance purposes, as well as for ensuring that data is not kept longer than necessary.
- **Creating a data access policy.** This defines who can access what data and for what purposes. This is important for protecting the privacy of individuals and for ensuring that data is used for authorized purposes.
- **Implementing data security measures.** This includes measures such as encryption, access controls, and auditing. These measures help to protect data from unauthorized access, use, or disclosure.

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Data Services

Data services are a broad term that can refer to a variety of different services that help organizations manage, store, and analyze their data. Some common types of data services include:

- **Data integration:** This type of service helps organizations **combine data from different sources into a single, unified view**.
- **Data warehousing:** This type of service provides a **central repository for storing and managing large amounts of data**.
- **Data mining:** This type of service helps organizations **discover hidden patterns and insights** in their data.
- **Data analytics:** This type of service helps organizations **analyze their data** to make better business decisions.
- **Data visualization:** This type of service helps organizations **present their data** in a way that is easy to understand and interpret.

Data services can be provided by a variety of different vendors, including software companies, cloud computing providers, and consulting firms. The specific type of data services that an organization needs will depend on its specific business needs and requirements.

Here are some of the benefits of using data services:

- **Improved data quality:** Data services can help organizations improve the quality of their data by removing duplicate data, correcting errors, and ensuring that data is consistent.
- **Increased data security:** Data services can help organizations increase the security of their data by encrypting data, implementing access controls, and monitoring for unauthorized access.
- **Reduced IT costs:** Data services can help organizations reduce their IT costs by outsourcing the management, storage, and analysis of their data.
- **Improved business decision-making:** Data services can help organizations make better business decisions by providing them with insights into their data.

If you are considering using data services, there are a few things you should keep in mind:

- **Define your needs:** Before you start looking for data services, you need to define your specific needs. What type of data do you need to manage, store, and analyze? What are your security requirements? What is your budget?
- **Do your research:** There are a number of different data services providers available, so it is important to do your research before you make a decision. Compare different providers' offerings, pricing, and terms of service.
- **Get started:** Once you have chosen a data services provider, you need to get started. This may involve migrating your data to the provider's platform, configuring the services, and training your staff.

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Strategic Planning

Strategic planning is the process of **defining an organization's long-term goals and objectives, and developing a plan** to achieve them. It is a systematic approach to setting direction, allocating resources, and making decisions.

The benefits of strategic planning include:

- Increased clarity of purpose and direction
- Improved alignment of goals and objectives
- More efficient use of resources
- Increased focus on key priorities
- Enhanced decision-making
- Improved performance

The steps involved in strategic planning typically include:

1. **Define the organization's vision and mission.** What is the organization's purpose? What does it want to achieve in the long term?
2. **Conduct a SWOT analysis.** What are the organization's strengths, weaknesses, opportunities, and threats?
3. **Set goals and objectives.** What are the specific goals that the organization wants to achieve?
4. **Develop a strategic plan.** How will the organization achieve its goals and objectives?
5. **Implement the strategic plan.** Put the plan into action and track progress.
6. **Evaluate and revise the strategic plan.** As the environment changes, the strategic plan may need to be updated.

Strategic planning is an ongoing process that should be reviewed and updated regularly. It is a valuable tool for helping organizations achieve their long-term goals.

Here are some of the key elements of strategic planning:

- **Vision:** A vision statement is a brief description of what the organization wants to achieve in the long term. It should be aspirational and inspiring.
- **Mission:** A mission statement describes the organization's purpose and what it does. It should be clear, concise, and easy to understand.
- **SWOT analysis:** A SWOT analysis is a tool for identifying the organization's strengths, weaknesses, opportunities, and threats. This information can be used to develop strategies for achieving the organization's goals.
- **Goals and objectives:** Goals are broad statements of what the organization wants to achieve. Objectives are specific, measurable, achievable, relevant, and time-bound statements that help the organization achieve its goals.
- **Strategic plan:** A strategic plan is a document that outlines the organization's goals, objectives, and strategies for achieving them. It should be comprehensive and easy to understand.
- **Implementation:** The strategic plan must be implemented in order to be successful. This requires the commitment of the organization's leadership and staff.
- **Evaluation and revision:** The strategic plan should be evaluated regularly to ensure that it is still relevant and effective. It may need to be revised as the organization's environment changes.

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Business Impact Analysis

A business impact analysis (BIA) is a structured **process for identifying and assessing the potential impact of a disruption** to an organization's critical business processes. The BIA is a key component of business continuity planning (BCP), and it helps organizations to:

- Understand the impact of a disruption on their business
- Prioritize their recovery efforts

- Develop and implement effective BCP measures

There are many different frameworks for conducting a BIA, but they all share some common steps. These steps typically include:

1. **Identifying critical business processes.** The first step is to identify the organization's critical business processes. These are the processes that are essential to the organization's ability to operate and deliver its products or services.
2. **Determining the impact of a disruption.** Once the critical business processes have been identified, the next step is to determine the impact of a disruption to those processes. This involves assessing the impact on the organization's finances, operations, and reputation.
3. **Establishing recovery objectives.** The third step is to establish recovery objectives. This involves setting targets for the time it takes to recover from a disruption, the level of service that must be restored, and the resources that will be required to recover.
4. **Developing recovery plans.** The fourth step is to develop recovery plans. These plans should detail the steps that will be taken to recover from a disruption, including the resources that will be required and the responsibilities of key personnel.
5. **Testing and rehearsing recovery plans.** The final step is to test and rehearse recovery plans. This helps to ensure that the plans are effective and that the organization is prepared to respond to a disruption.

A BIA is an essential tool for any organization that wants to be prepared for a disruption. By following the steps outlined above, organizations can identify their critical business processes, assess the impact of a disruption, and develop effective recovery plans.

Here are some additional tips for conducting a BIA:

- **Involve key stakeholders** in the BIA process. This will help to ensure that the analysis is comprehensive and that the recovery plans are realistic.
- Use a **variety of data sources to gather information** for the BIA. This includes financial data, operational data, and customer feedback.
- Use a r**isk management framework to assess the impact of a disruption**. This will help to ensure that the analysis is objective and that the recovery plans are proportionate to the risk.
- **Keep the BIA up-to-date**. The business environment is constantly changing, so it is important to review the BIA on a regular basis to ensure that it is still accurate.

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Data Lake analytics

Data lake analytics is a process of **analyzing data stored in a data lake**. Data lakes are large repositories of raw data that can be stored in any format. This makes them ideal for storing a wide variety of data, **including structured, unstructured, and semi-structured data**.

Data lake analytics can be used to extract insights from this data to improve decision-making, identify trends, and solve problems. There are a variety of tools and techniques that can be used for data lake analytics, including:

- **Hadoop:** Hadoop is an open-source framework for **storing and processing large datasets**. It can be used to analyze data stored in a data lake.
- **Hive:** Hive is a SQL-like language that can be used to query data stored in Hadoop.
- **Impala:** Impala is a high-performance **SQL engine** that can be used to query data stored in Hadoop.
- **Spark:** Spark is a unified **analytics engine** that can be used for batch and streaming data processing.
- **Azure Data Lake Analytics:** Azure Data Lake Analytics is a cloud-based service that can be used to analyze data stored in a data lake.

The choice of tools and techniques for data lake analytics will depend on the specific needs of the organization.

Here are some of the benefits of using data lake analytics:

- **Cost-effectiveness:** Data lakes are a cost-effective way to store large amounts of data.
- **Scalability:** Data lakes can be scaled to handle large amounts of data.
- **Flexibility:** Data lakes can store a variety of data formats.
- **Efficiency:** Data lake analytics can be used to extract insights from data quickly and efficiently.

Here are some of the challenges of using data lake analytics:

- **Complexity:** Data lakes can be complex to manage.
- **Performance**
- **Security:** Data lakes can be a security risk if not properly secured.
- **Skills:** Data lake analytics requires specialized skills.

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Azure HDInsight

Azure HDInsight is a fully managed, full-spectrum, **open-source analytics service** in the cloud for enterprises. It allows you to **use the Apache Hadoop Distributed File System (HDFS), Apache Hadoop YARN resource management, and a simple MapReduce programming model** to process and analyze batch data in parallel.

Azure HDInsight also supports other open-source big data **frameworks, such as Spark, Hive, Kafka, and HBase**. This makes it a powerful platform for big data analytics.

Some of the benefits of using Azure HDInsight include:

- **Ease of use:** Azure HDInsight is a fully managed service, so you don't have to worry about the underlying infrastructure.
- **Scalability:** Azure HDInsight can be scaled to handle large amounts of data.
- **Security:** Azure HDInsight is a secure platform that meets the compliance requirements of most organizations.
- **Cost-effectiveness:** Azure HDInsight is a cost-effective way to process big data.

If you are looking for a powerful and easy-to-use platform for big data analytics, Azure HDInsight is a good option.

Here are some of the features of Azure HDInsight:

- **Support for multiple Hadoop distributions:** Azure HDInsight supports multiple Hadoop distributions, including Hortonworks, Cloudera, and MapR. This gives you the flexibility to choose the distribution that best meets your needs.
- **Support for multiple big data frameworks:** Azure HDInsight supports multiple big data frameworks, including Spark, Hive, Kafka, and HBase. This gives you the flexibility to use the framework that best suits your application.
- **Secure and compliant:** Azure HDInsight is a secure and compliant platform that meets the compliance requirements of most organizations.
- **Cost-effective:** Azure HDInsight is a cost-effective way to process big data.

Here are some of the use cases for Azure HDInsight:

- **Big data analytics:** Azure HDInsight can be used to analyze large amounts of data to gain insights into your business.
- **Machine learning:** Azure HDInsight can be used to train and deploy machine learning models.
- **Real-time analytics:** Azure HDInsight can be used to analyze data in real time.
- **Data warehousing:** Azure HDInsight can be used to build a data warehouse in the cloud.

Azure HDInsight is a powerful, easy to use big data analytics platform. It supports multiple Hadoop distributions, multiple big data frameworks, and is secure and compliant.

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Java Questions

- **Core Java:**
  - What are the differences between ArrayList and LinkedList?
  - What is the difference between a static and an instance variable?
  - What is the difference between a method and a constructor?
  - What is the difference between an abstract class and an interface?
  - What is the difference between a checked exception and an unchecked exception?
- **Design patterns:**
  - What are the benefits of using design patterns?
  - What are some of the most common design patterns in Java?
  - How would you implement the Singleton pattern in Java?
  - How would you implement the Factory pattern in Java?

    - How would you implement the Observer pattern in Java?
- **Performance:**
    - How would you identify performance issues in an application?
    - How would you optimize an application for performance?
    - What are some of the most common performance bottlenecks in Java applications?
    - How would you use caching to improve performance?
    - How would you use load balancing to improve performance?
- **Web development:**
    - What are the different types of web frameworks in Java?
    - What are the benefits of using a web framework?
    - How would you implement a RESTful API in Java?
    - How would you implement a SOAP web service in Java?
    - How would you use a servlet to handle HTTP requests?
- **Other:**
    - What are your thoughts on the future of Java?
    - What are your favorite Java libraries and frameworks?
    - What are some of the challenges of being a senior Java developer?
    - What are your salary expectations?
- Tell me about a time when you had to solve a difficult problem.
- How do you handle conflict in the workplace?
- What is your experience working in a team environment?
- What are your strengths and weaknesses as a Java developer?

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Java Spring Boot Questions

- What are the advantages of using Spring Boot?
- What are the Spring Boot key components?
- Why Spring Boot over Spring?
- What is the starter dependency of the Spring boot module?
- How does Spring Boot works?
- What does the @SpringBootApplication annotation do internally?
- What are the different ways to configure Spring Boot?
- What are the different Spring Boot starters?
- What are the benefits of using Spring Boot Actuator?
- How to deploy a Spring Boot application?
- What are the best practices for writing Spring Boot applications?

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Angular Questions

- What are the advantages of using Spring Boot?
- What are the Spring Boot key components?
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- What is the starter dependency of the Spring boot module?
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- What are the benefits of using Spring Boot Actuator?
- How to deploy a Spring Boot application?
- What are the best practices for writing Spring Boot applications?

COB Lead Analytics Engineer Requirements

Monday, July 17, 2023 2:53 PM

[2:26 PM] Thompson, Brian

COB Lead Analytics Engineer - Remote
Our team provides Analytic Application development and support, Business Intelligence Solutions, Custom Reporting, and Consul ting for Optum Payment Integrity. We provide data analytic development services that identify overpayments or recoveries for Data Mining, Coordination of Benefits (COB), Fraud Waste Ab use and Error (FWAE), and Subrogation. This position will develop new analytics, enhance existing analytics, and maintain and improve the applications that support these analytics usi ng bigdata tools, Azure, Pyspark, SCALA technology stack.

[2:26 PM] Thompson, Brian

Responsibilities:
- Design, code, test, document, and maintain high-quality and scalable Big Data, Cloud solutions
- Design, develop and implement analytics rules engines
- Research, evaluate, and deploy new tools, frameworks, and patterns to build sustainable Big Data platform
- Identify gaps and opportunities for improvement of existing solutions
- Define and develop APIs for integration with various data sources in the enterprise
- Analyze and define customer requirements
- Assist in defining product technical architecture
- Make accurate development effort estimates to assist management in project and resource planning
- Create prototypes, proof-of-concepts & design and code reviews
- Collaborate with management, quality assurance, architecture, and other development teams
- Write technical documentation and participate in production support
- Keep skills up to date through ongoing self-directed training

[2:27 PM] Thompson, Brian

Requirements:
- Bachelor’s degree
- 12+ years of IT-related work experience
- 8+ years’ experience in hands-on software development
- 3+ years’ experience in development using SCALA Spark or Pyspark
- 3+ years’ experience in Azure cloud platform
- 2+ years’ in Bigdata tools, like Hadoop, MapReduce, HDFS, Spark, Kafka Streaming, Docker, and/or Kubernetes
- 2+ years’ experience in MySQL and NoSQL databases, Deltalake, Snowflake
- 2+ years’ experience with Agile/Scrum methodology and best practices
- 1+ years’ experience in scheduling tools, such as ADF/Airflow

Preferences:
- Data analysis experience
- Functional testing experience
- Healthcare industry experience
- Understanding of SOA (service-oriented architecture) concepts
- Excellent analysis, process, problem solving and critical thinking skills

[2:30 PM] Thompson, Brian

Per the hiring manager, focus on the following; Steven Roloffs (Mani, Sen, Jothi)
Spark, **Scala**, **Azure** (Data specific)
8-10 years experience engineering
3-5 yrs Spark/Scala
Python experience is ok.

- Migration work
- Once the work is there, then analytics enhancements. New analytics development in Scala.
- Having business knowledge of health care data. Working with our requestors, BA groups, we need good communicators.
- Communication skills, client mgmt skills a plus as they would be working with business units.

Technical Product Manager (TPM) Role

Wednesday, July 19, 2023 8:57 AM

A technical product manager (TPM) is a hybrid role that combines the skills of a product manager and a software engineer. TPMs are responsible for the technical aspects of product development, from defining the product requirements to working with the engineering team to bring the product to market.

Here are some of the key responsibilities of a technical product manager:

- **Define product requirements:** TPMs work with stakeholders to understand the needs of the users and translate those needs into technical requirements.
- **Work with engineering team:** TPMs work closely with the engineering team to ensure that the product is developed according to the requirements. They also help to troubleshoot problems and ensure that the product meets quality standards.
- **Manage the product roadmap:** TPMs are responsible for managing the product roadmap and ensuring that the product is aligned with the company's strategic g oals.
- **Gather and analyze data:** TPMs use data to track the performance of the product and identify areas for improvement. They also use data to make decision s about future product development.
- **Communicate with stakeholders:** TPMs communicate with stakeholders throughout the product development process to keep them informed of progress and to get fe edback.

In addition to these core responsibilities, TPMs may also be responsible for:

- **Conducting market research:** TPMs may conduct market research to identify new product opportunities and to understand the competitive landscape.
- **Managing product launches:** TPMs may be responsible for managing product launches, including coordinating with marketing and sales teams.
- **Providing technical support:** TPMs may provide technical support to users of the product.

To be successful in a technical product manager role, you need to have a strong understanding of both the technical and business aspects of product development. You should also have excellent communication and collaboration skills.

Here are some of the skills that are required to be a technical product manager:

- **Technical skills:** TPMs need to have a strong understanding of software engineering principles and practices. They should also be familiar with the different technologies that are used to build software products.
- **Business skills:** TPMs need to understand the business goals of the company and how the product can help to achieve those goals. They should al so be able to work with stakeholders to gather requirements and to communicate the product vision.
- **Communication skills:** TPMs need to be able to communicate effectively with both technical and non -technical audiences. They should be able to clearly explain complex technical concepts in a way that is easy to understand.
- **Collaboration skills:** TPMs need to be able to collaborate effectively with other teams, such as engineering, marketing, and sales. They should be a ble to work cross-functionally to bring the product to market.

If you are interested in a career as a technical product manager, there are a few things you can do to prepare:

- **Get a technical education:** A degree in computer science or software engineering is a good foundation for a career in technical product management.
- **Gain experience in product development:** You can gain experience in product development by working as a software engineer or by interning at a technology company.
- **Develop your business skills:** Take some business courses or read books about business strategy. This will help you to understand the business side of produ ct development.

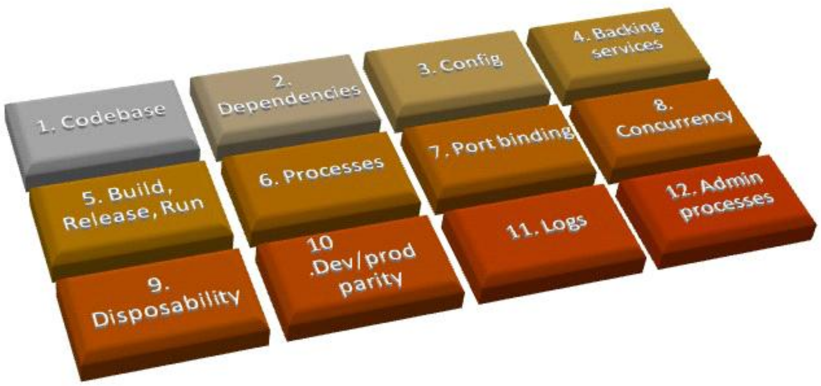
Network with other technical product managers: Attend industry events and connect with other technical product managers on LinkedIn. This will help you to learn more about the role and to get your foot in the door.

12 Factor App

Wednesday, July 19, 2023 8:57 AM

The Twelve Factors <https://12factor.net/>

1.1 Twelve-factor Applications



1.2 Twelve Factors, Microservices, and App Modernization

Heroku, a platform as a service (PaaS) provider, established general principles for creating useful web apps known as the Twelve-Factor Application. Applying 12-factor to microservices requires modification of the original PaaS definitions. The goal of combining microservices, twelve-factor app and app modernization is a general purpose reference architecture enabling continuous delivery.

1.3 The Twelve Factors

1. Codebase – One codebase tracked in revision control, many deploys
2. Dependencies – Explicitly declare and isolate dependencies
3. Config – Store config in the environment
4. Backing services – Treat backing services as attached resources
5. Build, release, run – Strictly separate build and run stages
6. Processes – Execute the app as one or more stateless processes
7. Port binding – Export services via port binding
8. Concurrency – Scale out via the process model
9. Disposability – Maximize robustness with fast startup and graceful shutdown
10. Dev/prod parity – Keep development, staging, and production as similar as possible
11. Logs – Treat logs as event streams
12. Admin processes – Run admin/management tasks as one-off processes

1.4 Categorizing the 12 Factors

Code

- Codebase
- Build, Release, Run
- Dev/prod parity

Deploy

- Dependencies
- Config
- Processes
- Backing services
- Port Binding

Operate

- Concurrency
- Disposability
- Logs
- Admin Processes

1.5 12-Factor Microservice Codebase

The Twelve-Factor App recommends one codebase per app. In a microservices architecture, the correct approach is one codebase per service. This codebase should be in version control, either distributed, e.g. git, or centralized, e.g. SVN.

1.6 12-Factor Microservice Dependencies

As suggested in The Twelve-Factor App, regardless of what platform your application is running on, use the dependency manager included with your language or framework. Do not assume that the tool, library or application your code depends on will be there. How you install an operating system or platform dependencies depends on the platform. In noncontainerized environments, use a configuration management tool (Chef, Puppet, Salt, Ansible) to install system dependencies. In a containerized environment, do this in the Dockerfile.

1.7 12-Factor Microservice Config

Anything that varies between deployments can be considered configuration. All configuration data should be stored in a separate place from the code, and read in by the code at runtime, e.g. when you deploy code to an environment, you copy the correct configuration files into the codebase at that time. The Twelve-Factor App guidelines recommend storing all configuration in the environment, rather than committing it to the source code repository. Use non-version controlled .env files for local development. Docker supports the loading of these files at runtime. Keep all .env files in a secure storage system, such as Hashicorp Vault, to keep the files available to the development teams, but not committed to Git. Use an environment variable for anything that can change at runtime, and for any secrets that should not be committed to the shared repository. Once you have deployed your application to a delivery platform, use the delivery platform's mechanism for managing environment variables.

1.8 12-Factor Microservice Backing Services

The Twelve-Factor App guidelines define a backing service as “any service the app consumes over the network as part of its normal operation.” Anything external to a service is treated as an attached resource, including other services. This ensures that every service is completely portable and loosely coupled to the other resources in the system. Strict separation increases flexibility during development – developers only need to run the service(s) they are modifying, not others. A database, cache, queueing system, etc. These should all be referenced by a simple endpoint (URL) and credentials, if necessary.

1.9 12-Factor Microservice Build, Release, Run
To support strict separation of build, release, and run stages, as recommended by The Twelve-Factor App, use a continuous integration/continuous delivery (CI/CD) tool to automate builds. Docker images make it easy to separate the build and run stages. Ideally, images are created from every commit and treated as deployment artifacts.

1.10 12-Factor Microservice Processes
For microservices, the application needs to be stateless. Stateless services scale a service horizontally by simply adding more instances of that service. Store any stateful data, or data that needs to be shared between instances, in a backing service.

1.11 12-Factor Microservice Port Binding
The twelve-factor app is completely self-contained and does not rely on runtime injection of a webserver into the execution environment to create a web-facing service. The web app exports HTTP as a service by binding to a port, and listening to requests coming in on that port. In a local development environment, the developer visits a service URL like http://localhost:5000/ to access the service exported by their app. In deployment, a routing layer handles routing requests from a publicfacing hostname to the port-bound web processes. This is typically implemented by using dependency declaration to add a webserver library to the app, such as Tornado for Python, Thin for Ruby, or Jetty for Java and other JVM-based languages. This happens entirely in user space, that is, within the app’s code. The contract with the execution environment is binding to a port to serve requests. Nearly any kind of server software can be run via a process binding to a port and awaiting incoming requests. Examples include ejabberd (speaking XMPP), and Redis (speaking the Redis protocol). The port-binding approach means that one app can become the backing service for another app, by providing the URL to the backing app as a resource handle in the config for the consuming app.

1.12 12-Factor Microservice Concurrency
The Unix and Mainframe process models are predecessors to a true microservices architecture, allowing specialization and resource sharing for different tasks within a monolithic application. For microservices architecture, we horizontally scale each service independently, to the extent supported by the underlying infrastructure. Docker or other containerized services, provide service concurrency.

1.13 12-Factor Microservice Disposability
Instances of a service need to be disposable so they can be started, stopped, and redeployed quickly, and with no loss of data. Services deployed in Docker containers satisfy this requirement automatically, as it’s an inherent feature of containers that they can be stopped and started instantly.Storing state or session data in queues or other backing services ensures that a request is handled seamlessly in the event of a container crash. Backing stores support crash-only design.

1.14 12-Factor Microservice Dev/Prod Parity
Keep all of your environments – development, staging, production, and so on as identical as possible, to reduce the risk that bugs show up only in some environments. Containers enable you to run exactly the same execution environment all the way from local development through production. Differences in the underlying data can still result in runtime changes in application behavior.

1.15 12-Factor Microservice Logs
Use a log-management solution in a microservice for routing or storing logs. Define logging strategy as part of the architecture standards, so all services generate logs in a similar fashion. Log strategy should be part of a larger Application Performance Management (APM) or Digital Performance Management (DPM) solution tied to the Everything as a Service model (XaaS).

1.16 12-Factor Microservice Admin Processes
In a production environment, run administrative and maintenance tasks separately from the app. Containers make this very easy, as you can spin up a container just to run a task and then shut it down. Examples include doing data cleanup, running analytics for a presentation, or turning on and off features for A/B testing.

1.17 Kubernetes and the Twelve Factors – 1 Codebase
Kubernetes makes heavy use of declarative constructs. All parts of a Kubernetes application are described with text-based representations in YAML or JSON. The referenced containers are themselves described in source code as a Dockerfile. Because everything from the image to the container deployment behavior is encapsulated in text, you are able to easily source control all the things, typically using git.

1.18 Kubernetes and the Twelve Factors – 2 Dependencies
A microservice is only as reliable as its most unreliable dependency. Kubernetes includes readinessProbes and livenessProbes that enable you to do ongoing dependency checking. The readinessProbe allows you to validate whether you have backing services that are healthy and you’re able to accept requests. The livenessProbe allows you to confirm that your microservice is healthy on its own. If either probe fails over a given window of time and threshold attempts, the Pod will be restarted.

1.19 Kubernetes and the Twelve Factors – 3 Config
The Config factor requires storing configuration sources in your process environment table (e.g. ENV VARs). Kubernetes provides ConfigMaps and Secrets that can be managed in source repositories. Secrets should never be source controlled without an additional layer of encryption. Containers can retrieve the config details at runtime.

1.20 Kubernetes and the Twelve Factors – 4 Backing Services
When you have network dependencies, we treat that dependency as a “Backing Service”. At any time, a backing service could be attached or detached and our microservice must be able to respond appropriately. For example, you have an application that interacts with a web server, you should isolate all interaction to that web server with some connection details (either dynamic service discovery or via Config in a Kubernetes Secret). Then consider whether your network requests implement fault tolerance such that if the backing service fails at runtime, your microservice does not trigger a cascading failure. That service may also be running in a separate container or somewhere off-cluster. Your microservice should not care as all interactions then occur through APIs to interact with the database.

1.21 Kubernetes and the Twelve Factors – 5 Build, Release, Run
Once you commit the code, a build occurs and the container image is built and published to an image registry. If you’re using Helm, your Kubernetes application may also be packaged and published into a Helm registry as well. These “releases” are then re-used and deployed across multiple environments to ensure that an unexpected change is not introduced somewhere in the process (by re-building the binary or image for each environment).

1.22 Kubernetes and the Twelve Factors – 6 Processes
In Kubernetes, a container image runs as a container process within a Pod. Kubernetes (and containers in general) provide a facade to provide better isolation of the container process from other containers running on the same host. Using a process model enables easier management for scaling and failure recover (e.g. restarts). Typically, the process should be stateless to support scaling the workload out through replication. For any state used by the application, you should use a persistent data store that all instances of your application process will discover via your Config. In Kubernetes-based applications where multiple copies of pods are running, requests can go to any pod, hence the microservice cannot assume sticky sessions.

1.23 Kubernetes and the Twelve Factors – 7 Port Binding

You can use Kubernetes Service objects to declare the network endpoints of your microservices and to resolve the network endpoints of other services in the cluster or off-cluster. Without containers, whenever you deployed a new service (or new version), you would have to perform some amount of collision avoidance for ports that are already in use on each host. Container isolation allows you to run every process (including multiple versions of the same microservice) on the same port (by using network namespaces in the Linux kernel) on a single host.

1.24 Kubernetes and the Twelve Factors – 8 Concurrency

Kubernetes allows you to scale the stateless application at runtime with various kinds of lifecycle controllers. The desired number of replicas are defined in the declarative model and can be changed at runtime. Kubernetes defines many lifecycle controllers for concurrency including ReplicationControllers, ReplicaSets, Deployments, StatefulSets, Jobs, and DaemonSets. Kubernetes supports autoscaling based on compute resource thresholds around CPU and memory or other external metrics. The Horizontal Pod Autoscaler (HPA) allows you to automatically scale the number of pods within a Deployment or ReplicaSet.

1.25 Kubernetes and the Twelve Factors – 9 Disposability

Within Kubernetes, you focus on the simple unit of deployment of Pods which can be created and destroyed as needed — no single Pod is all that valuable. When you achieve disposability, you can start up fast and the microservices can die at any time with no impact on user experience. With the livenessProbes and readinessProbes, Kubernetes will actually destroy Pods that are not healthy over a given window of time.

1.26 Kubernetes and the Twelve Factors – 10 Dev/Prod Parity

Containers (and to a large extent Kubernetes) standardize how you deliver your application and its running dependencies, meaning that you're able to deploy everything the same way everywhere. For example, if you're using MySQL in a highly available configuration in production, you can deploy the same architecture of MySQL in your dev cluster. By establishing parity of production architectures in earlier dev environments, you can typically avoid unforeseen differences that are important to how the application runs (or more importantly how it fails).

1.27 Kubernetes and the Twelve Factors – 11 Logs

For containers, you will typically write all logs to stdout and stderr file descriptors. The important design point is that a container should not attempt to manage internal files for log output, but instead delegate to the container orchestration system around it to collect logs and handle analysis and archival. Often in Kubernetes, you'll configure Log collection as one of the common services to manage Kubernetes. For example, you can enable an Elasticsearch-Logstash-Kibana (ELK) stack within the cluster.

1.28 Kubernetes and the Twelve Factors – 12 Admin Processes

Within Kubernetes, the Job controller allows you to create Pods that are run once or on a schedule to perform various activities. A Job might implement business logic, but because Kubernetes mounts API tokens into the Pod, you can also use them for interacting with the Kubernetes orchestrator as well. By isolating these kinds of administrative tasks, you can further simplify the behavior of your microservice.

1.29 Summary

The twelve-factor methodology can be applied to apps written in any programming language, and which use any combination of backing services (database, queue, memory cache, etc). The twelve-factor methodology is highly useful when creating microservices architecture based applications.

From <https://www.webagesolutions.com/blog/twelve-factor-applications-12-best-practices-for-microservices>

Data Quality Maturity Model

Friday, July 21, 2023 11:22 AM

A data quality maturity model is a framework that helps organizations assess their current data quality capabilities and identify opportunities for improvement. The model typically defines a set of levels of maturity, from ad hoc to optimized, and each level is associated with a set of characteristics or practices.

There are many different data quality maturity models available, but some of the most common include:

- **The CMMI for Data Management** (CMMI-DM) is a maturity model developed by the Software Engineering Institute (SEI). The CMMI-DM defines five levels of maturity, from initial to optimized.
- **The Gartner Data Quality Maturity Model** is a maturity model developed by Gartner. The Gartner model defines four levels of maturity, from reactive to proactive.
- **The HDQM2 Healthcare Data Quality Maturity Model** is a maturity model developed by Javier Mauricio Pinto-Valverde and colleagues. The HDQM2 model defines five levels of maturity, from ad hoc to optimized.

The benefits of using a data quality maturity model include:

- **Improved data quality:** By identifying and addressing data quality issues, organizations can improve the accuracy, completeness, and timeliness of their data.
- **Increased efficiency:** Improved data quality can lead to increased efficiency in business processes. For example, organizations with high-quality data can automate more processes and make better decisions.
- **Reduced risk:** Poor data quality can lead to a number of risks, such as compliance violations, financial losses, and reputational damage. By improving data quality, organizations can reduce these risks.

If you are interested in assessing your organization's data quality maturity, there are a number of resources available to help you. You can find maturity models, assessment tools, and guidance on the websites of organizations such as the SEI, Gartner, and the HDQM2 project.

Here are some additional tips for using a data quality maturity model:

- **Start by assessing your current state.** This will help you identify your strengths and weaknesses and determine where you need to focus your improvement efforts.
- **Set realistic goals.** Don't try to achieve too much too soon. Start by setting small, achievable goals and then gradually increase your ambition as you make progress.
- **Get buy-in from stakeholders.** Data quality improvement is a team effort. Make sure that all stakeholders are aware of the importance of data quality and are committed to making improvements.
- **Measure your progress.** It is important to track your progress over time so that you can see how your efforts are paying off.

Using a data quality maturity model can help you improve the quality of your data and achieve your business goals. By following these tips, you can make the most of this valuable tool.

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CMMI for Data Management

CMMI for Data Management (CMMI-DM) is a process improvement model that helps organizations improve their data management capabilities. It is based on the CMMI framework, which is a widely-used model for improving the maturity of software development processes.

CMMI-DM provides organizations with a set of best practices for managing data throughout its lifecycle. These best practices cover areas such as data governance, data quality, data security, and data architecture.

The CMMI-DM model is organized into five maturity levels, each of which represents a different level of maturity in data management capabilities. Level 1 is the lowest level, and Level 5 is the highest level.

Organizations can use the CMMI-DM model to assess their current data management maturity level and identify areas where they can improve. They can then use the model to develop and implement a plan for improvement.

The benefits of using CMMI-DM include:

- Improved data quality
- Reduced data security risks
- Increased data availability
- Improved decision-making
- Reduced costs
- Increased compliance

If you are looking to improve your organization's data management capabilities, then CMMI-DM is a good option to consider.

Here are some of the key benefits of using CMMI for data management:

- **Improved decision-making:** By having a better understanding of their data, organizations can make better decisions about how to use it. This can lead to improved efficiency, profitability, and customer satisfaction.
- **Reduced costs:** By reducing data errors and improving data quality, organizations can save money on things like data cleansing and data storage.
- **Increased compliance:** By having a well-defined data management process, organizations can reduce their risk of non-compliance with regulations.
- **Increased customer trust:** By ensuring that their data is secure and accurate, organizations can build trust with their customers.

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Gartner Data Management

The Gartner data quality maturity model is a framework that organizations can use to assess their current data quality capabilities and identify opportunities for improvement. The model has five levels, ranging from ad hoc and reactive to proactive and optimized.

- **Level 1: Ad hoc and reactive**

Organizations at this level have little or no formal data quality management processes in place. Data quality is typically an afterthought, and problems are addressed only when they become critical.

- **Level 2: Repeatable and managed**

Organizations at this level have begun to implement some basic data quality management processes, such as data profiling and cleansing. However, these processes are often ad hoc and not fully integrated with other business processes.

- **Level 3: Defined and measurable**

Organizations at this level have a more mature data quality management program. They have defined data quality standards and metrics, and they are using these metrics to track progress and identify areas for improvement.

- **Level 4: Integrated and predictive**

Organizations at this level have fully integrated data quality management into their business processes. They are using data quality information to make strategic decisions and to improve the performance of their business.

- **Level 5: Proactive and optimized**

Organizations at this level are leaders in data quality management. They are constantly innovating and looking for new ways to improve the quality of their data. They are also using data quality information to drive innovation and growth.

The Gartner data quality maturity model is a valuable tool for organizations that are looking to improve their data quality. By understanding their current level of maturity, organizations can identify the steps they need to take to achieve their data quality goals.

Here are some of the benefits of using the Gartner data quality maturity model:

- It can help you assess your current data quality capabilities.
- It can help you identify opportunities for improvement.
- It can help you set realistic and measurable goals.
- It can help you track your progress over time.
- It can help you benchmark your organization against other organizations.

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Just thinking…

- **Level 1: Ad hoc and reactive**
  Organizations at this level have little or no formal data quality management processes in place. Data quality is typically an afterthought, and problems are addressed only when they become critical.
- **Level 2: Repeatable and managed**
  Organizations at this level have begun to implement some basic data quality management processes, such as data profiling and cleansing. However, these processes are often ad hoc and not fully integrated with other business processes.
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- **Level 4: Integrated and predictive**
  Organizations at this level have fully integrated data quality management into their business processes. They are using data quality information to make strategic decisions and to improve the performance of their business.
- **Level 5: Proactive and optimized**
  Organizations at this level are leaders in data quality

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No formal data quality management processes in place
Define data quality standards and metrics
Leverage metrics to track progress and identify areas for improvement
Integrate data quality management into their business processes
Implement DQ Proactively and continuously optimize

Medicare & Medicaid

Sunday, July 23, 2023 5:52 PM

Medicare is a national health insurance program for people aged 65 and older, certain younger people with disabilities, and people with End-Stage Renal Disease (ESRD). It is a federal program administered by the Centers for Medicare and Medicaid Services (CMS).

There are four parts to Medicare:

- **Part A** covers hospital stays, skilled nursing facility care, hospice care, and some home health care.
- **Part B** covers doctor visits, preventive care, medical equipment, and some other services.
- **Part C** is Medicare Advantage, which are private plans that offer all the benefits of Part A and Part B, plus some extra benefits.
- **Part D** covers prescription drugs.

You can get Medicare by enrolling in it when you are first eligible, or you can wait until you are closer to needing it. If you wait, you may have to pay a higher premium.

To learn more about Medicare, you can visit the Medicare website at www.medicare.gov. You can also call Medicare at 1-800-633-4227.

Here are some of the benefits of Medicare:

- It helps pay for health care costs.
- It provides coverage for a wide range of services.
- It is a federal program, so it is regulated and there are consumer protections.
- It is affordable, with premiums that are based on your income.

Here are some of the drawbacks of Medicare:

- It does not cover all health care costs.
- There are copays and deductibles for some services.
- You may have to pay more if you choose a Medicare Advantage plan.
- The rules can be complex.

Overall, Medicare is a valuable program that can help you pay for health care costs. It is important to understand the benefits and drawbacks of Medicare so that you can make the best decision for your needs.

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Medicaid is a joint federal and state program that provides health insurance to low-income Americans, including children, pregnant women, parents, seniors, and individuals with disabilities. It is the single largest source of health coverage in the United States, covering over 72.5 million people.

Medicaid eligibility criteria vary from state to state. However, federal law requires states to cover certain groups of individuals, such as:

- Low-income families
- Qualified pregnant women and children
- Individuals receiving Supplemental Security Income (SSI)
- Adults with disabilities who meet certain income and asset requirements
- Individuals who are blind or have end-stage renal disease

In addition to these mandatory eligibility groups, states may also choose to cover other groups, such as childless adults, working adults, and people with certain chronic conditions.

Medicaid covers a wide range of health services, including:

- Inpatient and outpatient hospital services
- Physician services
- Laboratory and x-ray services
- Home health services
- Prescription drugs
- Mental health and substance abuse services
- Long-term care services

The specific services that are covered vary from state to state. However, all states must cover certain mandatory benefits, such as inpatient and outpatient hospital services, physician services, and laboratory and x-ray services.

To apply for Medicaid, you must contact your state's Medicaid agency. You can find contact information for your state's Medicaid agency on the Medicaid website.

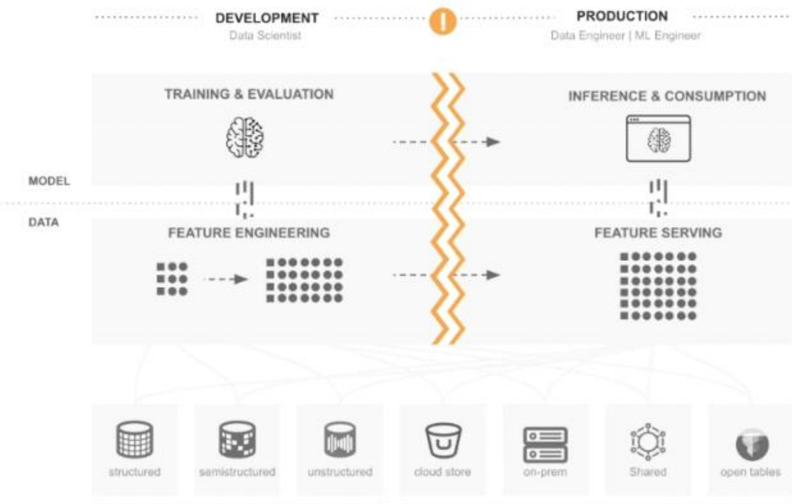
If you are unsure if you might qualify for Medicaid, you can use the Medicaid eligibility screening tool on the HealthCare.gov website. This tool will ask you a few questions about your income, family size, and other factors to determine if you might be eligible for Medicaid.

Medicaid is an important source of health coverage for millions of Americans. If you are eligible for Medicaid, you should apply to see if you can get coverage.

Snowflake - ML Development

Monday, July 24, 2023 9:29 AM

The ML development to production gap



- Siloed teams & tools
- Processing complexity
- Broken data foundation

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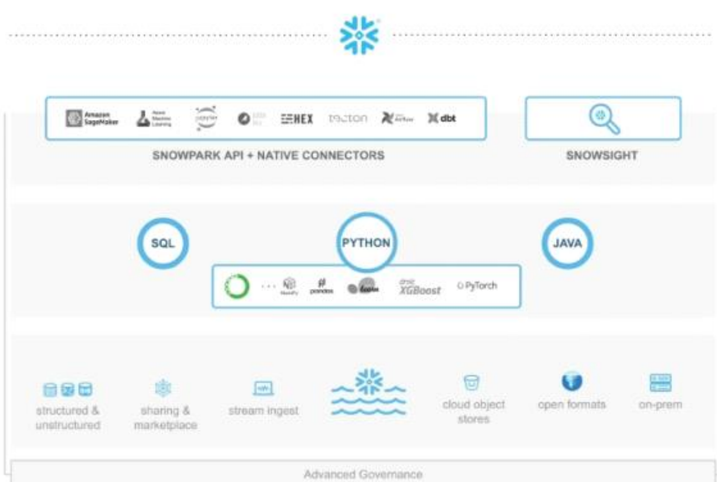
Snowflake Platform for Data Science & ML



- **Natively integrated ecosystem**
  Develop using Python worksheets or any IDE
- **Multi-language, elastic engine**
  SQL, Snowpark for Python, Java & Scala
- **Unified data access**

on-prem & open format data access in preview

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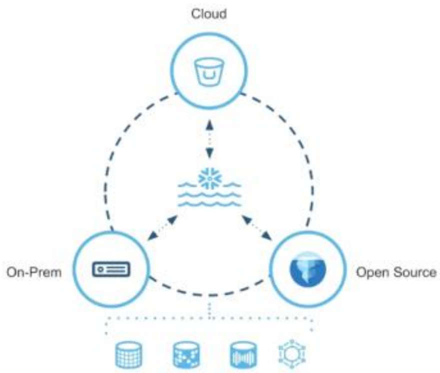
GO FROM BROKEN DATA FOUNDATION...

To instant access to all data



Bring data to your models with speed
Single point for governance, discovery and access of structured, semi-structured, and unstructured data

Enhance model performance the data-centric way
Data sharing without ETL from business partners and third-party data via Snowflake Marketplace

Leverage data from external data lakes*
Seamlessly connect with data in cloud object stores, on-prem or in open table formats.

*On-prem and open source in private preview

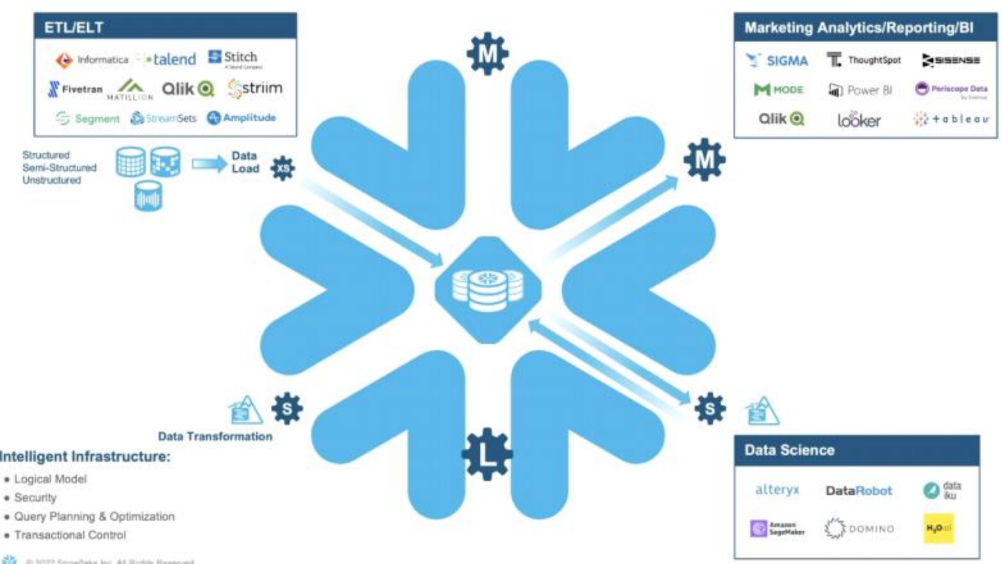
GO FROM COMPUTE SILOES AND COMPLEXITY...

To elastic processing

Streamline infrastructure for polyglot data teams
Single platform to build and deploy data pipelines and ML models using SQL, Python, Java or Scala

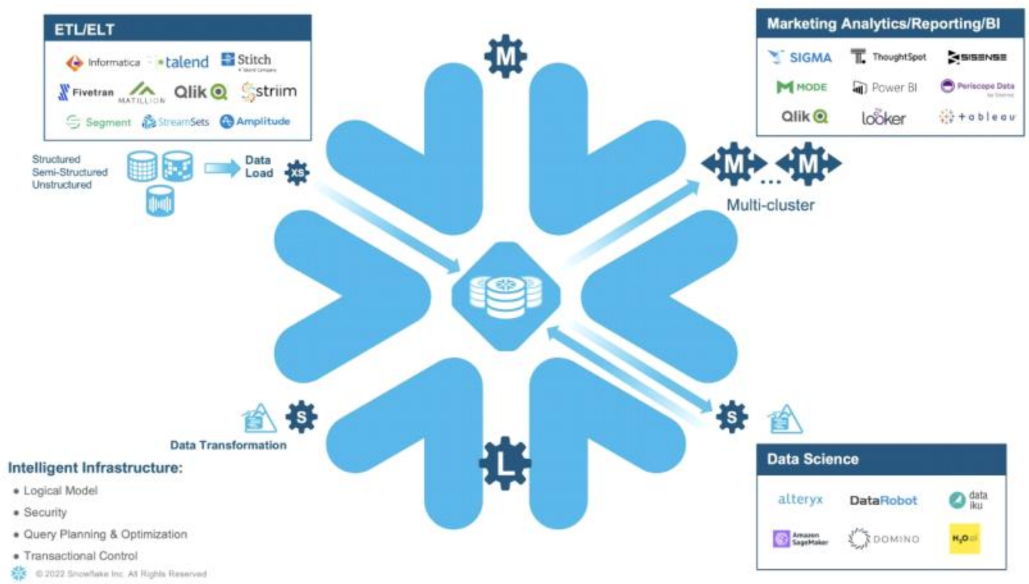
Remove bottlenecks with elastic processing
Intelligent, multi-cluster compute infrastructure with elastic scaling keeps you ops free

Adapt processing to meet your ML needs
Flexibility to use variety of compute configurations to get cost-effective performance across the ML workflow



Intelligent Infrastructure:

- Logical Model
- Security
- Query Planning & Optimization
- Transactional Control



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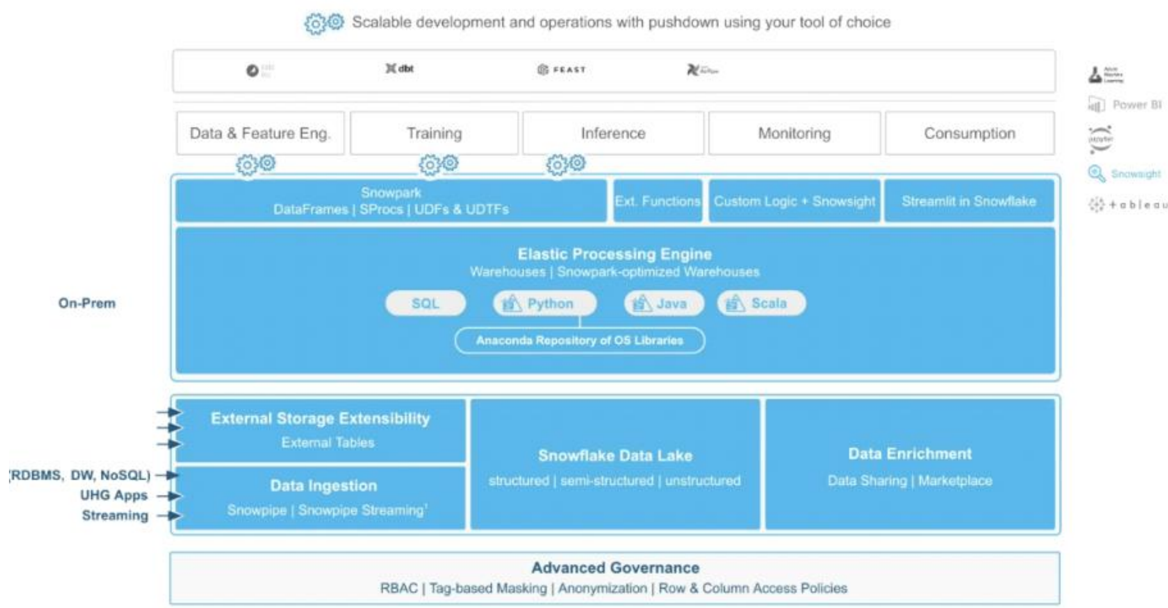
Snowflake Platform for DS & ML



Microsoft Fabric

Monday, July 31, 2023 10:38 PM

Microsoft has recently launched a set of integrated services under the umbrella of Microsoft Fabric.

At the core, it brings together Azure Synapse, Azure Data Factory and Power BI and much more into a single 'One Lake' constru ct - similar to OneDrive that you may be familiar with.

Microsoft is making a big play with this launch of new SaaS platform that brings data management, data engineering, data gove rnance and data security - all in one single data operations context.

Chat GPT LLM is built in along with the CoPilot functionality.

Fabric has been launched recently. This is a technology worth staying close to - especially if you have experience with any of the three core components mentioned above.

If you are MSFT technology aficionado, please dig into Microsoft's Fabric documentation to learn more. This data management / data science simplification positioning could be a growth pivot for us)and other consultants) as organizations consider Microsoft Fabric as a 'technology of choice' in the times to come.

Enjoy learning more about Fabric at

https://www.microsoft.com/en-us/microsoft-fabric
https://learn.microsoft.com/en-us/fabric/

Cloud Systems Research Specialist

Wednesday, August 2, 2023 4:48 PM

Job Summary

The Cloud Systems Research Specialist is responsible for researching, evaluating, and recommending cloud computing solutionsfor the organization. This role will work closely with other technical teams to design, deploy, and manage cloud-based systems. The ideal candidate will have a strong understanding of cloud computing technologies, as well as experience inresearch and analysis.

Responsibilities

- Research and evaluate cloud computing technologies
- Recommend cloud computing solutions for the organization
- Design, deploy, and manage cloud-based systems
- Work with other technical teams to integrate cloud-based systems with existing infrastructure
- Conduct cloud computing research and analysis
- Stay up-to-date on the latest cloud computing trends

Qualifications

- Bachelor's degree in computer science, information technology, or a related field
- 5+ years of experience in cloud computing
- Strong understanding of cloud computing technologies, such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Pl atform (GCP)
- Experience in research and analysis
- Excellent problem-solving and analytical skills
- Excellent written and verbal communication skills

Benefits

- Competitive salary and benefits package
- Opportunity to work on cutting-edge cloud computing technologies
- Chance to make a significant impact on the organization's cloud computing strategy
- Collaborative and supportive work environment

If you are a highly motivated and experienced Cloud Systems Research Specialist, we encourage you to apply today!

Enterprise Architect role

Wednesday, August 2, 2023 5:03 PM

Enterprise Architect
Job Description
Summary

The Enterprise Architect is responsible for the design, development, and implementation of the organization's enterprise architecture. This includes the identification of business needs, the development of architectural solutions, and the coordination of implementation projects. The Enterprise Architect must have a strong understanding of business and IT principles, as well as the ability to translate these into practical solutions.

Responsibilities

- Develop and maintain the organization's enterprise architecture framework
- Identify and assess business needs
- Develop architectural solutions to meet business needs
- Coordinate implementation projects
- Communicate with stakeholders
- Stay up-to-date on industry trends and technologies

Qualifications

- Bachelor's degree in computer science, information technology, or a related field
- 5+ years of experience in enterprise architecture
- Strong understanding of business and IT principles
- Excellent communication and interpersonal skills
- Ability to work independently and as part of a team
- Ability to think strategically and solve complex problems

Skills

- Business analysis
- IT architecture
- Systems design
- Project management
- Communication
- Leadership
- Problem solving
- Teamwork

Benefits

- Competitive salary
- Comprehensive benefits package
- Opportunity to work on challenging and rewarding projects
- Chance to make a significant impact on the organization

Cloud Digital Transformation Lead

Wednesday, August 2, 2023 5:04 PM

The cloud digital transformation lead role is responsible for leading the organization's cloud migration and adoption efforts. This includes defining the business case for cloud, selecting the right cloud platform, migrating applications and data to the cloud, and managing the cloud environment. The cloud digital transformation lead also works with other stakeholders, such as IT, business, and operations, to ensure that the cloud transformation is successful.

The specific responsibilities of a cloud digital transformation lead vary depending on the organization's size, industry, and cloud maturity. However, some common responsibilities include:

- **Defining the business case for cloud:** The cloud digital transformation lead must understand the organization's business goals and objectives, and how cloud can help them achieve those goals. They must also be able to quantify the benefits of cloud, such as cost savings, agility, and scalability.
- **Selecting the right cloud platform:** There are many different cloud platforms available, each with its own strengths and weaknesses. The cloud digital transformation lead must select the platform that is the best fit for the organization's needs.
- **Migrating applications and data to the cloud:** The cloud digital transformation lead must work with IT to migrate applications and data to the cloud. This can be a complex and challenging process, as it requires careful planning and execution.
- **Managing the cloud environment:** Once applications and data have been migrated to the cloud, the cloud digital transformation lead must manage the cloud environment. This includes tasks such as monitoring performance, securing the environment, and optimizing costs.
- **Working with other stakeholders:** The cloud digital transformation lead must work with other stakeholders, such as IT, business, and operations, to ensure that the cloud transformation is successful. This includes communicating the benefits of cloud, resolving issues, and getting buy-in from all stakeholders.

The cloud digital transformation lead role is a critical one, as it can help organizations achieve significant benefits from cloud. The cloud digital transformation lead must have a strong understanding of cloud technologies, as well as the business needs of the organization. They must also be able to work effectively with other stakeholders to ensure a successful cloud transformation.

Here are some of the skills and experience that are typically required for a cloud digital transformation lead role:

- **Cloud computing experience:** The cloud digital transformation lead must have a deep understanding of cloud computing technologies, such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform.
- **Business acumen:** The cloud digital transformation lead must understand the business needs of the organization and how cloud can help them achieve their goals.
- **Leadership skills:** The cloud digital transformation lead must be able to lead and motivate a team to achieve the organization's cloud transformation goals.
- **Communication skills:** The cloud digital transformation lead must be able to communicate effectively with both technical and non-technical audiences.
- **Problem-solving skills:** The cloud digital transformation lead must be able to identify and solve problems that arise during the cloud transformation process.

If you are interested in a career in cloud digital transformation, there are a few things you can do to prepare:

- **Get certified in cloud computing:** There are many different cloud computing certifications available, such as the AWS Certified Solutions Architect – Associate and the Microsoft Certified Solutions Expert (MCSE) – Cloud Platform and Infrastructure.
- **Gain experience in cloud computing:** There are many ways to gain experience in cloud computing, such as by working in a cloud-based organization, volunteering for a cloud-based project, or taking online courses.
- **Develop your leadership skills:** Leadership skills are essential for success in the cloud digital transformation role. You can develop your leadership skills by taking leadership courses, volunteering for leadership positions, or reading books about leadership.
- **Network with other cloud professionals:** Networking with other cloud professionals is a great way to learn about new cloud technologies and trends. You can network with other cloud professionals by attending industry events, joining online forums, or connecting with people on LinkedIn.

The cloud digital transformation role is a challenging and rewarding one. If you are interested in a career in cloud computing, this is a great role to consider.

Cloud Data Migration

Wednesday, August 2, 2023 5:05 PM

The role of a cloud data migration specialist is to oversee the process of moving data from an on-premises environment to the cloud. This can be a complex and challenging task, as it requires careful planning, execution, and testing.

The specific responsibilities of a cloud data migration specialist will vary depending on the specific needs of the organization. However, some common tasks include:

- **Planning and designing the migration project.** This includes identifying the data that needs to be migrated, determining the best migration method, and creating a timeline and budget.
- **Migrating the data.** This may involve using a variety of tools and techniques, depending on the size and complexity of the data.
- **Testing the migrated data.** This ensures that the data has been migrated correctly and that it is accessible and usable in the cloud environment.
- **Supporting the post-migration environment.** This may involve providing training to users, troubleshooting issues, and monitoring the performance of the migrated data.

In addition to these technical skills, cloud data migration specialists also need to have strong communication and problem-solving skills. They need to be able to work effectively with a variety of stakeholders, including IT staff, business users, and cloud providers.

The demand for cloud data migration specialists is growing as more and more organizations move their data to the cloud. If you are interested in a career in this field, there are a number of things you can do to prepare. First, you should develop your technical skills in data migration and cloud computing. You should also gain experience in working with a variety of stakeholders. Finally, you should network with other professionals in the field and stay up-to-date on the latest trends.

Here are some of the skills and qualifications that are typically required for a cloud data migration role:

- **Technical skills:** Experience with data migration tools and techniques, cloud computing platforms, and data security.
- **Communication skills:** The ability to communicate effectively with technical and non-technical audiences.
- **Problem-solving skills:** The ability to identify and solve problems in a timely and efficient manner.
- **Teamwork skills:** The ability to work effectively with others to achieve common goals.
- **Attention to detail:** The ability to pay attention to detail and ensure that the migration process is executed correctly.

If you have these skills and qualifications, you may be well-suited for a career in cloud data migration. This is a growing field with many opportunities for skilled professionals.

Strategic Planning, Designing Roadmaps, and Adoption

Wednesday, August 2, 2023 5:06 PM

The role of strategic planning, designing roadmaps, and adoption architectures is to ensure that an organization's technology infrastructure is aligned with its business goals. This includes:

- **Defining the organization's strategic goals.** What does the organization want to achieve in the short-term, medium-term, and long-term?
- **Identifying the key technologies that will be needed to achieve these goals.** What are the current and future technology trends that will impact the organization?
- **Creating a roadmap for the adoption of new technologies.** How will the organization implement these technologies in a phased and systematic way?
- **Managing the adoption of new technologies.** How will the organization ensure that new technologies are adopted effectively and efficiently?

The role of strategic planning, designing roadmaps, and adoption architectures is essential for organizations that want to stay ahead of the curve and remain competitive. By carefully planning and managing the adoption of new technologies, organizations can ensure that they are well-positioned for success in the future.

Here are some specific tasks that may be involved in this role:

- Conducting market research to identify emerging technologies and trends
- Developing a business case for the adoption of new technologies
- Managing the procurement process for new technologies
- Integrating new technologies into the organization's existing infrastructure
- Training employees on how to use new technologies
- Measuring the success of the adoption of new technologies

The role of strategic planning, designing roadmaps, and adoption architectures is a complex and challenging one, but it is also essential for organizations that want to succeed in the digital age.

Here are some of the benefits of having a strong strategic planning, roadmap design, and adoption architecture function:

- Increased alignment between business goals and technology infrastructure
- Improved decision-making about technology investments
- Reduced risk of technology failures
- Increased efficiency and productivity
- Enhanced competitive advantage

If you are interested in a career in this field, there are a few things you can do to prepare:

- Gain a strong understanding of business strategy and technology trends
- Develop strong analytical and problem-solving skills
- Learn how to manage projects and people
- Gain experience in the IT industry

With the right skills and experience, you can play a vital role in helping organizations achieve their strategic goals through the adoption of new technologies.

BladeBridge

Thursday, August 17, 2023 7:09 PM

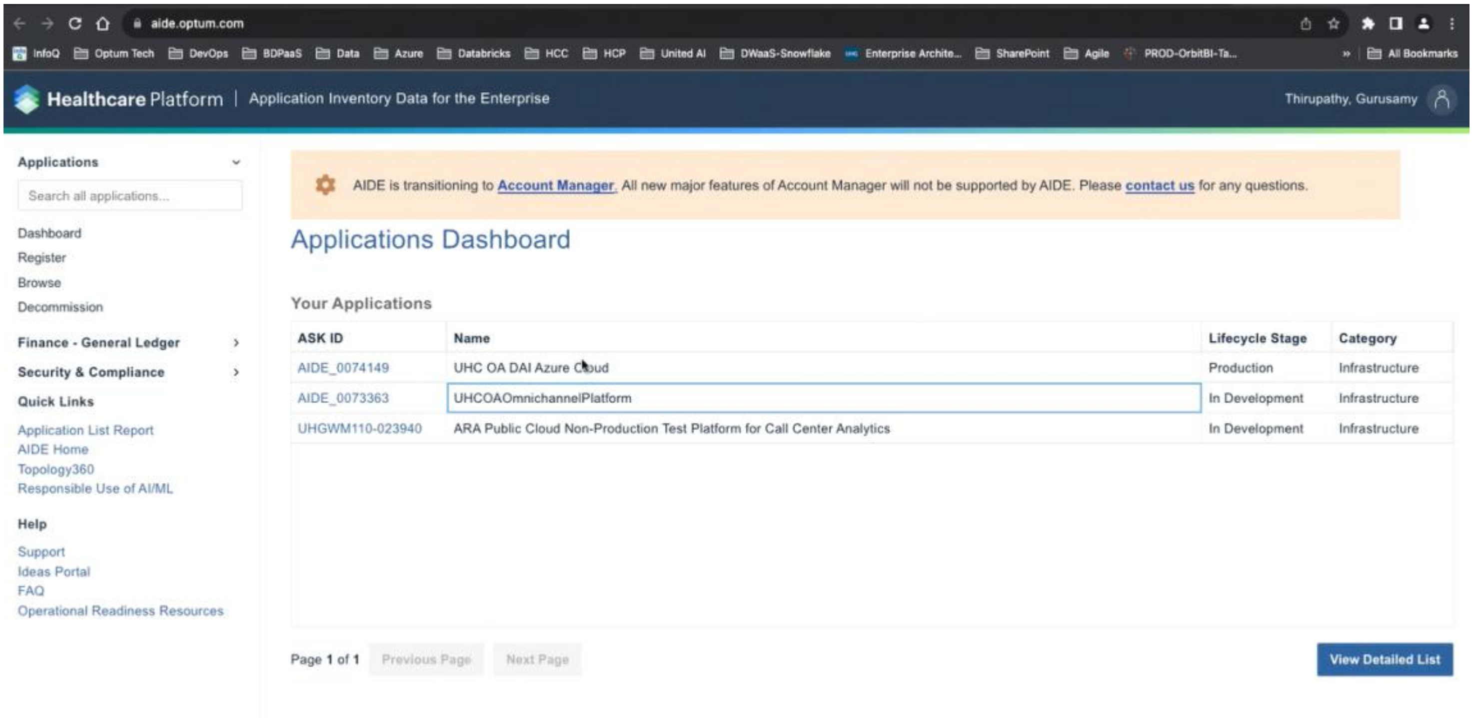
Meeting 08/16/2023 with BladeBridge
Subject: exploring opportunity for Abaniseau
She has to get off Abaniseau by the end of December

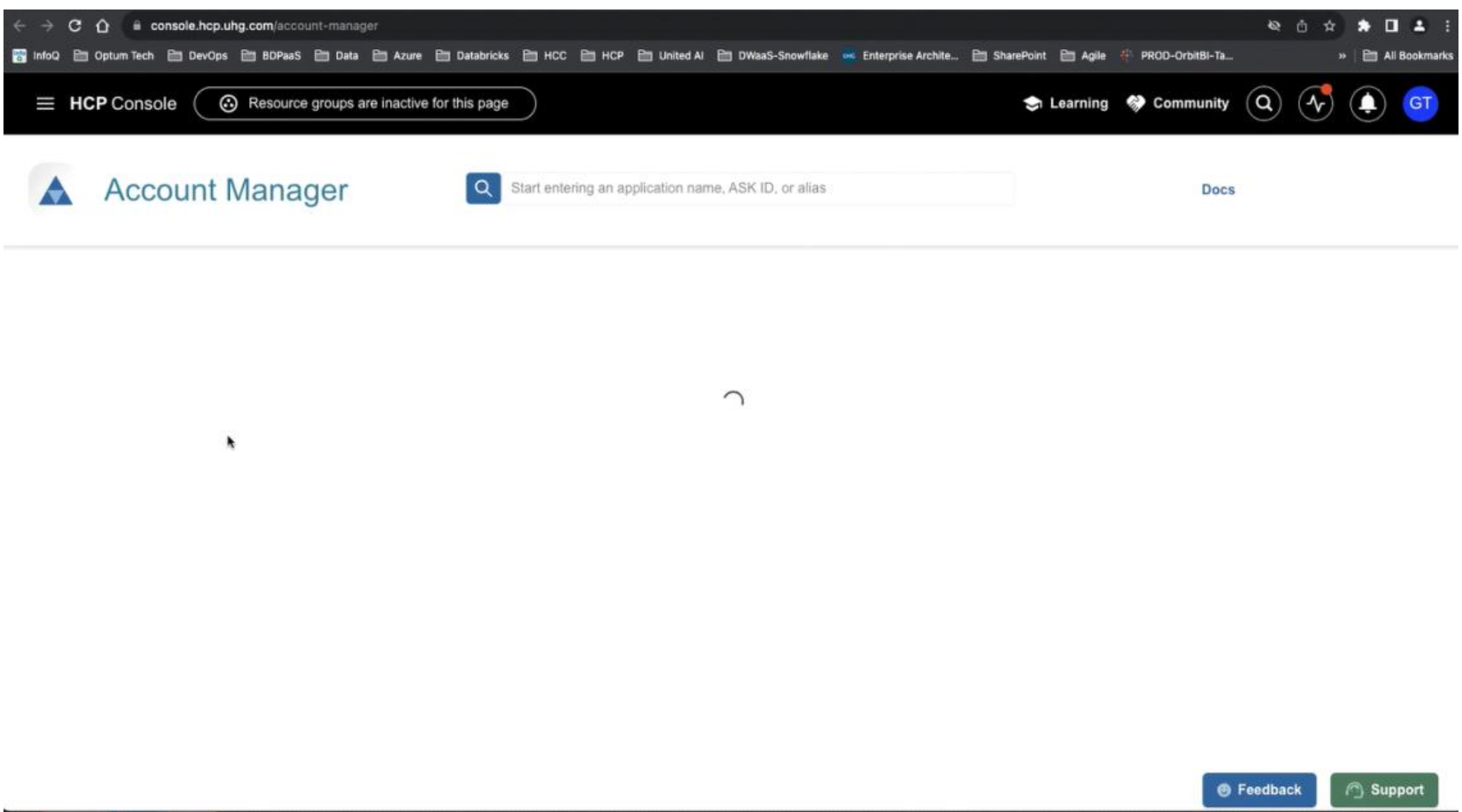
Utilization excel sheet on the finance website
Check utilization every Tuesday, is it get accunted for?
+++

To request Ask ID

Monday, October 2, 2023 3:48 PM

To request ASK ID: https://aide.optum.com/





Candidates

Sunday, January 7, 2024 7:20 PM

Roshan Shaik
Venkat Dutt
Sahitha Sri
Lohithaksh Annarapu

Bharath Gangula
NIRAULA PRADIP

- SANTHOSH CHANDRA KONDURU
- Haren Pavan Sai Nerella
- LEELA SAI SANKAR REDDY PARVATHAM

Request Secure access for Someone else

Wednesday, February 7, 2024 5:48 PM

Request Secure access for someone else: https://helpdesk.uhg.com/hc?id=itss_hc_kb_article_view&sysparm_article=KB0109389&sys_kb_id=e2685fa58775f550db382178dabb35ce&s pa=1

Request Global Group Access for another person

Public Cloud Access Controls - PIM / RBAC implementation campaign

Friday, February 9, 2024 9:18 AM

Public
Cloud Pl...

- Many users have privileges to modify/delete your cloud production infrastructure including perimeter security - presents a huge risk
- Mitigation strategy is to implement Privileged Identity Management (PIM), which is time -based and approval-based
- Identify accountable leader: DC and email Subbiah S.
- Cascade within LoB to help with prioritization
- Appointed LoB leaders to work with app owners and implement least privilege access.
  - LoB leaders run audit reports to monitor and report progress on account remediation.
  - Attend weekly calls (to be set up)
- Remove all owner and contributor access from public cloud accounts.

- LoB's run account assessment of over privileged accounts using scripts provided by public cloud team
- LoB's remove over privileged accounts and implement PIM
- Script to pull users associated with excess privileges
- Subscription owners must enable PIM on all AZU cloud native write groups (e.g., _Owner and _Contributor)

References

Audit - https://github.com/optum-eeps/public-cloud-permission-audit
PIM Enablement - https://docs.hcp.uhg.com/public-cloud/pim-rbac-enablement

To get a list of all affected accounts:

1. Get list of all accounts: https://itfm.optum.com/analytics/PublicCloudAccounts
2. Select "Show accounts with charges in" to be "This month"
3. Select the "Service Provider" you would like to audit.
4. Select the "Segment" you would like to audit.
5. Select the "Crosstab" file to download
6. Choose the "CSV" option
7. Copy the file to the same directory you will be executing the script.

Execute the script
Azure

1. Log into the azure cli using
   az login -o none
2. Execute the azure script: 7 ./accounts-azure.sh >> accounts-azure.csv -
   a. Output of the file will be: Subscription Id, MS Domain/Azure group, User Name, User Email

Sponsor

- Vasant Manohar

Team

- Subbiah Shenbagaraman (Campaign Lead)
- Jason Lahr

Resources:

- Audit Script - Github Link
- PIM / RBAC Implementation Playbook - HCP Docs

- **Office hours – Mon (3:00-4:00 PM CT)**

Timeline to Complete:

- LoB's Remediation Plan – 2/28/2024
- Azure – target 3/31/2024
- AWS & GCP – Under Review

++

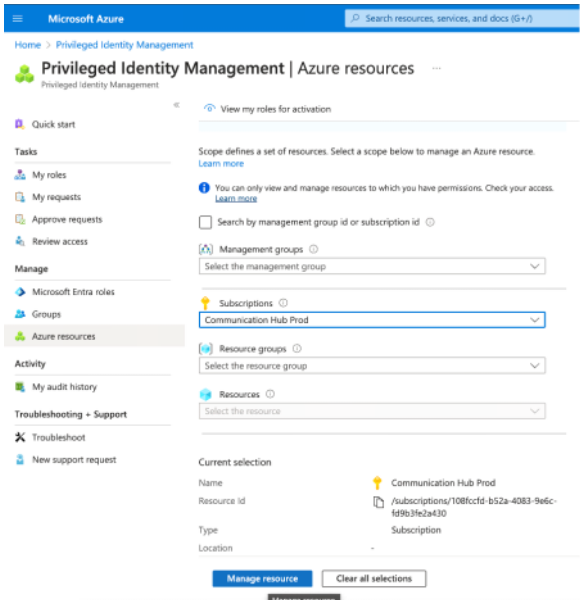
Prerequisites

- User **must have access to the AZU_${id}_Owner role** in the subscription they are editing (to be removed after steps completed).
- Create a new group to Secure with syntax AZU_${id}_PIM_Contributor for each subscription.
  - Create a subscription level Secure group
  - Secure team can assist with bulk adding groups and members to groups. Must be greater than 20 groups.
- Each group will require an owner in Secure and it is recommended to add additional approvers.

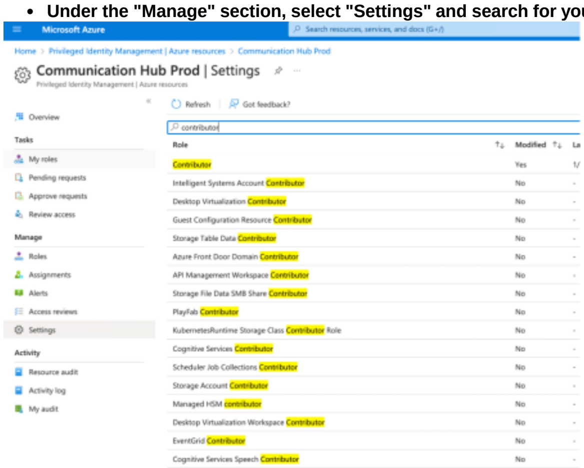
WARNING: Any team that currently creates their own groups or service principals will no longer be able to do so and must enable a centralized application team to create them in the future.

PIM Enablement

- **In the PIM console, select "Azure Resources" and search for your subscription. Then, select "Manage Resource".**



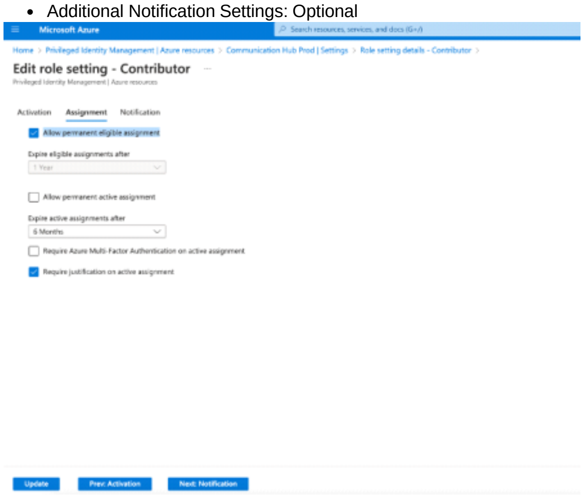
- **Under the "Manage" section, select "Settings" and search for your role (Contributor, Owner, etc.). Note: there is some slight latency while this page loads.**



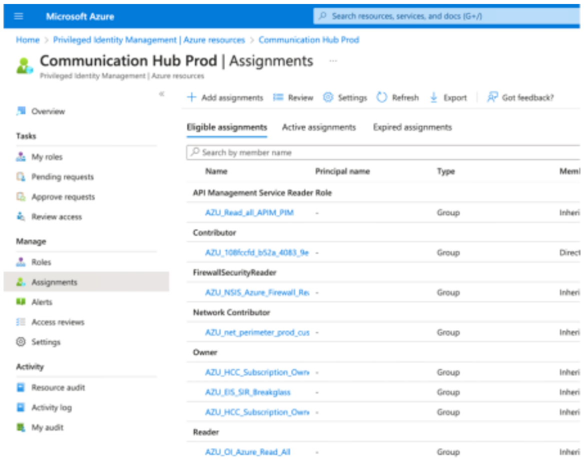
- **Once you have selected your role, select "Edit" under the "Assignment" blade. Next, select the "Allow permanent eligible acce ss" checkbox and click update. This allows your PIM role to be permanently eligible for activation.**

Miscellaneous Configs

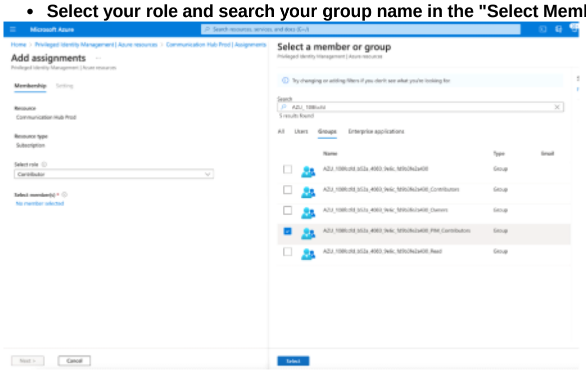
- Additional MFA, sign in needed to activate: Optional
- Justification required: Yes
- Approval required: Optional
- Allow Permanent eligible assignment: Yes
- Additional Notification Settings: Optional



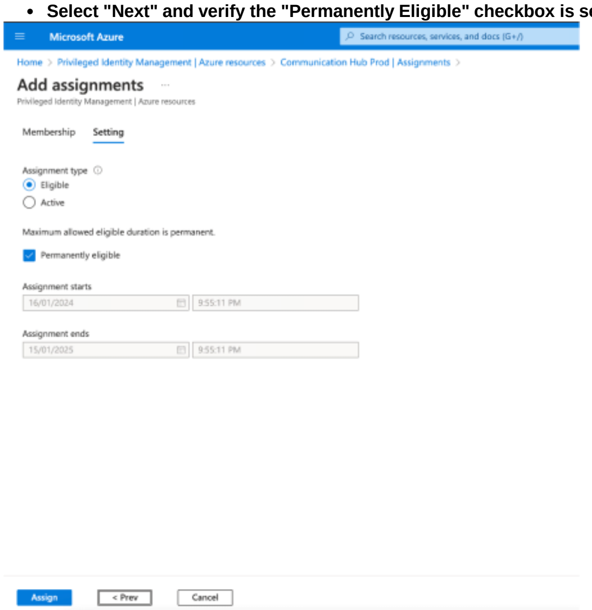
- **Back in the "Manage" blade, select "Assignments" and then "Add assignments" at the top of the page.**



- **Select your role and search your group name in the "Select Membership" window.**



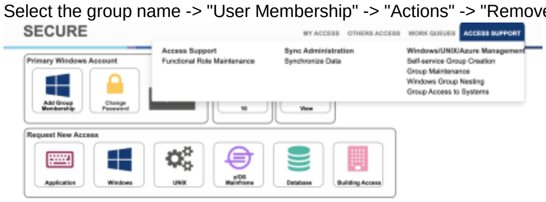
- **Select "Next" and verify the "Permanently Eligible" checkbox is selected.**



- **The group name will now appear in the "Assignments" page under the role you have selected.**

Permanent Access Cleanup

- IMPORTANT: Remove users from LP created _Owner and _Contributor groups. DO NOT DELETE these groups or it will cause LP failur es.
  - Only one or two senior team members should have permanent access to _Owner and _Contributor groups.
  - NOTE: Optum Rx subscriptions can NOT have any permanent users.
- Group membership and ownership can be reviewed within the "Group Search" tab of AD Lookup.
- Group membership can be removed in Secure under the "Group Maintenance" tab.
  - Select the group name -> "User Membership" -> "Actions" -> "Remove Members".

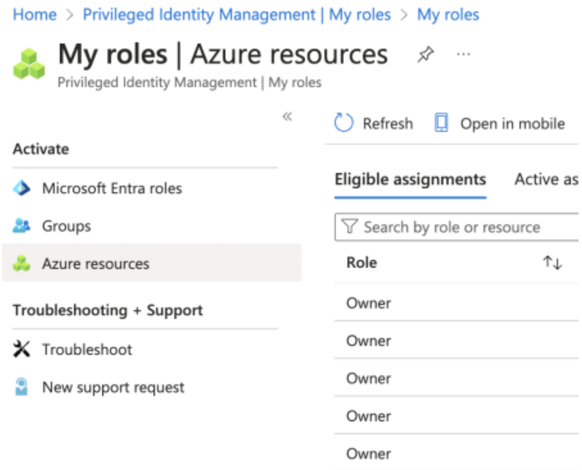


  - Secure team can assist with bulk removal. Must be greater than 20 groups.

- **Subscription members should request permanent AZU_${id}_Read role with their MSID.**

PIM Role Activation

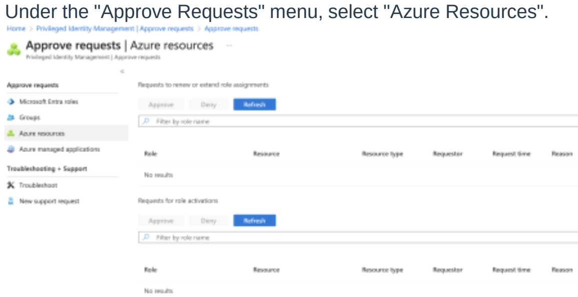
- In the PIM console select "My Roles".
- Under the "Activate" menu, select "Azure Resources".
- A list of your eligible roles will be available.
- Select "Activate" and toggle the "Duration" bar to the required time (maximum of 8 hrs.)
- Provide justification



- For additional questions on PIM enablement and consulting please tag "HCC Public Cloud Ops (Not K8s)" in the Azure Teams chan nel or email Public_Cloud_TechOps_DL@ds.uhc.com
- [Further MS PIM documentation]

PIM Approval

- In the PIM console select "Approve Requests".
- Under the "Approve Requests" menu, select "Azure Resources".



From <https://docs.hcp.uhg.com/public-cloud/pim-rbac-enablement>

Optum Advisory MBOS
You Shared, We Listened

MBOs need to evolve to **better serve our consultants** and the **growth and strategic direction** of the Optum Advisory Business

Improve the Employee Experience	• Reduction in utilization targets and weighting • Utilization and sales ramp-up period for new hires	• Recognition of people leader role in utilization targets • Increased emphasis on client value and role competency
Align behaviors and incentives to the new OA Strategy	• Collaboration vs individual results • OA revenue and sales vs practice / product • Multi-product, large and multi-year sales	• Pull-through contribution for Optum • Resource sharing and optimization • Growth mindset at all levels
Reinforce priorities of Client and Enterprise Value	• Client value delivered as expected • Client reference-ability • Client NPS improvement • Operational discipline	• Insource of selected vendor spend • Joint Optum operating models • Portfolio optimization and innovation

2024 Senior Leader MBOs – Growth Leader

Category		MBO Name	Definition	Weight GL32	Weight GL31	Weight GL30
Grow the Business	1	Sales Performance	Sales contribution Credit vs Target	target by role & practice 20%	target by role & practice 20%	target by role & practice 20%
	2		Sales credit on cross-practice or multi-product solutions	3 or more opportunities 5%	2 or more opportunities 5%	N/A 0%
	3		Optum Advisory pull-through contribution for Optum vs Target	5%	0%	0%
Operate the Business	4	Role Competency	Evaluation of performance at current grade level (as defined by OAS Career Model), quality of work, and client satisfaction	15-25%	15-25%	15-25%
	5	Utilization	Utilization performance vs target: - client billable utilization - non-billable productive/investments	% and hours 15%	% and hours 20%	% and hours 25%
	6	Operational Discipline	- Engagement margin performance of sold and/or delivered engagements vs target, Delivery Excellence - Sales operational discipline (pipeline hygiene, deal review) - Leverage efficiencies (use of global delivery, pyramid structures)	10%	10%	10%
Deliver Client Value & Quality	7	Client Relationship NPS	Client Relationship NPS is scored based on the "likelihood to recommend" survey question facilitated in partnership with UHG Strategic Insights and vendor	5%	5%	5%
	8	Client Reference Ability	Reference-able clients and completion of targeted case studies	5%	5%	5%
Innovate the Business	9	Strategic Contribution	OA strategic contribution (market insights, industry knowledge, support OA and OI growth priorities and initiatives, strategic solutioning and innovation, etc.)	10%	10%	10%
Develop our People	10	Employee Experience Index (EXI) (people leaders)	Measures the outcomes of employee commitment (EXI-COMM employees' emotional connection to the vision and mission of the company) and employee belonging/effort (EXI-BELONG employees' daily experiences with their role, tasks and work environment).	0-5%	0-5%	0-5%
	11	Manager Experience Index (MEI) (people leaders)	Measures employees' views about their managers' effectiveness managing people and work.	0-5%	0-5%	0-5%

- ✓ New MBO to encourage collaboration and multi-product offerings
- ✓ 30 day grace period for new hires for sales and utilization MBOs
- ✓ Reduction in utilization targets by 2% pts for all, 6% pts for people leaders with span >=5
- ✓ New measures and emphasis on client value and quality
- ✓ Focus on developing our people and employee experience

2024 GL26-29 Advisory Consultant MBOs

Category		MBO Name	Definition	Weight
Deliver Client Value	1	Role Competency	Evaluation of performance at current grade level (as defined by OAS Career Model), quality of work, and client satisfaction	40%
Grow & Operate the Business	2	Utilization	Utilization performance vs target: - client billable utilization - non-billable productive/investments	% and hours 35%
	3	Growth Mindset	Lead identification and sharing, one or more leads or referrals, supporting the sales process	5%
	4	Operational Discipline	Operational discipline (delivery excellence, staffing, bookings, timesheets, unbilled)	10%
Invest	5	Invest in People and our Business	- Grow personal skills (certifications, material training, expansion of capable roles). Grow others, mentoring, buddy, onboarding assistance. - Contribute to the business: assist in development of OA capabilities, market, community, sales support, Practice Olympics, tools and accelerators, process improvement, etc.	10%

- ✓ 30 day grace period for new hires for utilization MBO
- ✓ Reduction in utilization targets by 2% pts for all consultants
- ✓ Reduced weighting for utilization
- ✓ New MBO to promote growth mindset at all levels (behavior vs outcome focused)
- ✓ Focus on developing our people and investing in our business

Azure Data Fabric

Thursday, November 7, 2024 3:34 PM

RE: Overview of Azure Data Fabric

Reply | Reply All | Forward

KV Kong, Victoria

To Cheema, Dave; Inder Rana; Whitmer, Patrick; Haugan, Grant D

Cc Shin, John S; Baig, Muquaddar; Khurana, Preeti; Kumar, Mahesh; Pal, Sujit; jared.zagelbaum@microsoft.com; Pamela Taylor

Thu 11/7/2024 3:32 PM

Retention Policy UHGInbox (90 days) Expires 2/5/2025

Start your reply all with: Thank you! Got it, thanks! Completed. Feedback

Here are the onboarding instructions for MS Fabric
https://uhgazure.sharepoint.com/teams/OrbitPowerBIForms/SitePages/Orbit-PowerBI-Intake-Process.aspx?referrer=Yammer&referrerScenario=Feed.View#request-fabric

Training Opportunities

Friday, March 21, 2025 10:45 AM

Exclusive access to no-charge training and discounted certifications through Microsoft.

Just *some* of the paths available now:

Microsoft 365 Copilot	Executives Business Users Administrators Copilot Champions Low-Code Developers
Azure	Azure Administrators Azure Solutions Architects Low-Code Developers
Data & AI	Executives AI Engineers Data Analysts Data Engineer Data Scientists Developers DevOps Engineers
Security	CISO & Decision Makers Security Architect SecOps Analyst Identity & Access Administrator Data Security Administrator

Access Your Benefits by Clicking Below

Exclusive Learning Portal

Access your learning benefits in one place

Learn live & hands-on Full-time or Part-time

Flexible Instructor-Led training options

Microsoft Certification

Show the world with discounted exams

Learning your way, at your pace

Rich Self-Paced Learning Paths

Skilling plan support for your team from a Learning Manager

Andy Engle

24x7 ESI Support Desk for questions

Hitting a snag? We can help!

aws

AWS PARTNER CERTIFICATION READINESS

Global Program Schedule

Hello AWS Accelerated Development Partners,

I'm pleased to share our AWS Partner Certification Readiness (APCR) programs, designed to help your teams achieve AWS certifications efficiently and effectively. These free training programs will help your team:

- Prepare systematically for AWS certification exams
- Join structured, cohort-based learning programs
- Access training in your preferred time zone
- Scale AWS expertise across your organization

Our comprehensive Q2 2025 schedule includes:

- AWS Machine Learning Engineer Associate (New April sessions added!)
- AWS Certified Cloud Practitioner
- AWS Certified Developer Associate
- AWS Certified AI Practitioner

These cohort-based, multi-week enablement programs are available across different regions, allowing partners to select the most suitable time zone. Due to high demand, we've added new Machine Learning Engineer Associate certification readiness sessions for April 2025.

I encourage you to share this opportunity with all team members looking to advance their AWS certifications. While exam fees are not included, **all training programs are complimentary for AWS Partners.**

Accelerating Innovation with Databricks & UHG

Databricks Core Dedicated Team

Account Directors

- Mike Kaveney (Minneapolis) mike.kaveney@databricks.com +1.612.991.4322
- Jason Garverich (Boston) jason.garverich@databricks.com +1.781.413.5356

Solution Architects

- Emma Yamada (New York) - emma.yamada@databricks.com
- Cristopher Rios-Martinez (New York) - cris.rios@databricks.com

Delivery Solution Architects

- Zachary Bannor (Chicago) - zachary.bannor@databricks.com
- Satish Garla (Hyderabad, India) - satish.garla@databricks.com

Center for Enablement

- Justin Whitney - justin.whitney@databricks.com
- Eric Hoel- eric.hoel@databricks.com

Databricks Engagement Forums

Databricks Center for Enablement

- cfe.optum.com
- Databricks User Community (Viva Engage) & MS Teams Channel
- Weekly Office Hours: Tue 9:30am CT; Thu 10:30am CT
- More details at https://cfe.optum.com/contact_us/

Databricks Training

Explore the Unified Data Lakehouse Platform (UDLP)

- HCP Unified Data Lakehouse Platform (UDLP)

Optum Tech University – Databricks Training

- Optum Tech University – Databricks training

Snowflake & UHG

snowflake

Snowflake Core Dedicated Team

Account Executive

- mike.miller@snowflake.com
- +1 651-600-1005

Solution Architects

- Mike_Fulkerson@optum.com
- gene_furibondo@optum.com

HCP/SDRP Product Owner

- rajesh.nair10@optum.com

Snowflake Engagement Forums

Snowflake for Enablement

- Join the community: SDRP team
- Office Hours on **HCP Data Platform Events Calendar**
- **Tuesdays 7am CT and Thursdays 11 AM**
- Upcoming event: https://docs.hcp.uhg.com/strategic-data-repository-platform-(sdrp)/upcoming_events

Snowflake Training

UHG MyLearning:

- https://uhg.edcast.com

SDRP (Strategic Data Repository Platform):

- Zero-to-Snowflake Lab: Link

Snowflake University:

- Snowflake Education and Training | Snowflake

Hands-On Essentials Workshops:

- Snowflake Hands On Essentials Workshops

Click-by-Click Labs:

- Snowflake Quickstarts

Free Trial Account:

- Snowflake Trial

Leadership

Tuesday, June 10, 2025 3:50 PM

***Description of Performance Problem (up to 2048 characters):**
Feedback from the Client's Customer is as follows:
* Ineffective Meeting Management: Despite advice to meet with each team individually, set up recurring meetings with mixed teams, leading to confusion and inefficiency. Frequently asked the wrong audience for information, such as discussing PeopleSoft or ePAM with Quantum contacts, causing further confusion and frustration.
    [DC] - Since I was not familiar with the Treasury stakeholders, I was relying on the Treasury SMEs to point me to the right folks and who should I invite to those meetings. I was inviting those folks based on the SME's advice. This individual who reported this, had told me that she will get me the data.
* Lack of Retention and Understanding: Dave has failed to document information provided by teams and often does not understand the data sources and systems, leading to repeated requests for the same information.
    [DC] - I still have those notes. When Dinesh and John had asked for them, I had shared those notes with them.
* Inadequate Data Management: We have data ready for him, but he has not provided a landing site for new data transmissions, hindering our progress.
    [DC] - I was told to setup a separate infrastructure for the Treasury department to segregate the billing. So, I was working with a platform engineer, so was setting up subscriptions, and permissions, for which he was at the mercy of those folks. I wanted to provide them the proper folder structures along with proper security controls. Also, using the same subscription, but separate billing was more complicated than expected. As far as hindering the progress goes, there was no infrastructure for them to operate on, so they would not have been able to do anything without the infrastructure platform.

The above has led to frustration by the client customer teams and a request from them to remove Dave from the project.

2) Feedback from the our direct client
* Way off the mark for a deliverable
    [DC] - I could estimate only based on the information I was given. I was asking for the data sources, instead I was given reports. I have evidence of that
* Dave doesn't understand what treasury is doing
    [DC] - True.
* Over-estimated the complexity – these data and reports are not that complex
    [DC] - I can estimate only based on what I'm privy to
* Can't just make assumptions and not get to air-tight scope
    [DC] - We were not there yet. I could only communicate what I had thus far
* Continues to get systems confused
    [DC] - It was the various information coming from various sources/SMEs
* Quantum coming from People Soft – wrong
    [DC] - This is my note on it: "Quantum is a cash management system, comes from PeopleSoft General Ledger. "
* Complexity of things un-related to source data
    [DC] - Complexity got added because I was getting reports, instead of data sources
* Dave didn't scope the work
    [DC] - I had provided the lists of data sources that I needed to more than Treasury SME and I had validated that list with the RAD data SME.
* Didn't operate as a Director and pushed hard enough to get the source files
    [DC] - sounds like personal perspective.
* Have made things more embarrassing (for us) to go back to client and ask for the same data again
    [DC] - I had identified all needed data sources, OA going back to the direct client was a reaction to pacify the direct client

Date(s) and Description of Prior Communication(s):

Concerns were raised by the Client's customer and client regarding David's performance on February 28th. This prompted multiple meetings throughout March from March 3 thru March 22 in-order to address the feedback. Actions taken included removing David from meetings with the Client's customer, delegating those responsibilities to client leads to refine input. Discussions were held with David regarding his high effort estimate for the RAD Treasury solution build-out, which **he consistently defended**. Ultimately, direct meetings with Client leaders were conducted to adjust assumptions on input data, significantly reducing the complexity and aligning the effort estimate with client expectations. Additionally, a different lead was assigned to oversee the development and implementation phase of the RAD Treasury project.

Corrective Actions to be taken by Employee: <https://globalselfservice.uhg.com/psc/pshpr01/EMPLOYEE/HRMS/c/UHC_LD_PERFORMANCE_EMPL.UHC_CORRECT_ACTION.GBL?Page=UHC_CAP_MGR&Action=C&EMPLID=001617529&EMPL_RCD=0&UHC_ORIGINATION_DT=2025-05-12>

The expectation is for immediate and sustained improvement.

David must demonstrate that he is able to "Managing Ambiguity and Uncertainty" and "Influencing Others" as appropriate. I will be working with Dave to give him opportunities in the next 2 months to demonstrate the above and that concerns raised by our client and our client's customer are not going to reoccur.

Failure to correct performance issues may result in further corrective action up to and including termination.

Progress Updates:
Dave seems to have gotten into a mode where he is hesitant and unsure about taking initiative on his own. This is not the mindset that will help him successfully make the corrective adjustments that led to this CAP. I have provided guidance to Dave as such in emails and in 1-on-1s.

Specific examples of Dave projecting the above behavior include the following:

1) Arranging a live convo with appropriate folks on the client side should be an obvious step when questions come-up. If support is needed in that conversation, Dave should add me and others as needed and give folks a heads up on context of the conversation. Dave should not come asking plainly about what he should do to address the topic. (Influencing Others)

2) Dave should know to pro-actively reach out to the client to address any potential questions outstanding about our proposal AND to get input on client-side decisioning progress. Instead, Dave is worried he might be pestering the client unnecessarily, etc. Dave should know what is pestering and what is positive reach out to a client. (Managing Ambiguity and Uncertainty)

Manager's Email and my responses:

RE: WellMed Central Quality - SQL95 Assessment proposal

CD Cheema, Dave
To Shin, John S

Reply | Reply All | Forward

Wed 6/18/2025 1:05 PM

Thank you so much for this encouraging email.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, June 18, 2025 1:02 PM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Re: WellMed Central Quality - SQL95 Assessment proposal

Hi Dave,

Your response seems to confirm my observations, and I would like to clarify my guidance to you that you should not hesitate to do what you believe is appropriate to be a leader on the team.

I can understand your frustration and perspective that you are being criticized BUT I think if you could adjust your perspective and take it as guidance, maybe it will help your mindset and ability to make appropriate behavioral adjustments.

As I guided you on our 1-on-1 multiple times, focus on the lesson learned and what could have been done better NOT shutting down and being hesitant to take action.

Let's continue to work together as part of the CAP and see if we can make progress together.

Thanks,

Let's continue to work together as part of the CAP and see if we can make progress together.

Thanks,

John Shin (he/him)
Sr. Director Cloud Data Engineering & Solutions | Optum Advisory | Optum

O 1-952-833-7266
M 1-612-321-6400
john.shin@optum.com

12125 Technology Drive
Eden Prairie, MN 55344

Optum

Integrity • Compassion • Inclusion • Relationships • Innovation • Performance

From: Cheema, Dave <dave.cheema@optum.com>
Date: Wednesday, June 18, 2025 at 12:16 PM
To: Shin, John S <john.shin@optum.com>
Subject: RE: WellMed Central Quality - SQL95 Assessment proposal

John,

Thank you for those observations. In general, in my desire to ensure that no opportunity is jeopardized, I reach out to my leadership for counsel when needed. Is that not the right approach? I have responded to the things you pointed out inline, starting with [DC] - , in Blue. Please take a look at them and let me know your thoughts. Thank you.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, June 18, 2025 10:57 AM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Re: WellMed Central Quality - SQL95 Assessment proposal

Hi Dave,

I know from our last 1-on-1 conversation that you are hesitant and unsure about taking initiative on your own… I don't think that is the mindset that will help you be successful.
[DC] - It is not that I can't take those initiatives on my own, but the challenge for me is that no matter what I do is wrong. It is the constant criticism and nitpicking of every little thing that has made me second guess what I do.

For a direct example, arranging a live convo with appropriate folks on the client side should be an obvious next step. If you need support for that conversation, you should add us as needed and give us a heads up on what the conversation needed is… not come to us with a what should I do here type of ask.
[DC] - I felt that a wrong response could jeopardize this opportunity; to prevent from such happening, I sought your advice. To you, setting up a meeting was the obvious choice; for me, she was asking me for a response, and I wanted to provide an appropriate response and did not want to jeopardize this opportunity, so I reached out to my leadership to get proper guidance, instead of getting criticized for it.

Another example is when you weren't being proactive about following up with Elizabeth a couple weeks ago and instead just waiting for Elizabeth to come back.
[DC] – Again – I did not want to jeopardize this opportunity by excessively pinging her and turning her off. Because too much pinging can turn people off and a sign of desperation.

Please give this some consideration.

John Shin (he/him)
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From: Cheema, Dave <dave.cheema@optum.com>
Date: Wednesday, June 18, 2025 at 10:28 AM
To: Shin, John S <john.shin@optum.com>, Malhotra, Dinesh <dinesh.malhotra@optum.com>
Subject: RE: WellMed Central Quality - SQL95 Assessment proposal

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Dave Cheema

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To: Malhotra, Dinesh <dinesh.malhotra@optum.com>; Shin, John S <john.shin@optum.com>
Subject: WellMed Central Quality - SQL95 Assessment proposal

Dinesh, John,

Please see below the response I got this morning from Elizabeth Chu from the WellMed Central Quality team regarding the Assessment proposal:

Yesterday

Hello Elizabeth, how is going? Hope all is well. Did you get any word from your leadership on the SQL95 A
proposal? Thank you.

Today

Elizabeth Chu 5:53 AM

Hi Dave - I think our concern at this point is we aren't really comparing apples to apples. We are looking for an end-to-en
proposal inclusive of migration, and I think your team wants to do the assessment first before you can estimate that, corre

Please advise **how should I respond to it**? Thank you.

Regards,
Dave Cheema

++

06/10/2025 - what touch points are covered

1. Covered the state of RAD modernization and WellMed Central Quality SQL95 Assessment proposal.
2. John advised that I should ping Elizabeth again today in a gentle, friendly way
3. John told me that my emails should provide the specifics of the ask in the emails, as opposed to generic emails. John showed a specific example.
4. John told me to enter all touch points covered in our 1-on-1 meetings in MyGPS. He told me that he is asking all his direct reports to do the same.
5. About the WellMed Central Quality's relationship to the WellMed EDW program - when Dinesh had asked me if I knew how this project will interact/integrate with the WellMed EDW Modernization program, you jumped in and said, no, I have not spoken to him about it yet, and nothing more happened to that subject after that. However, in today's conversation, somehow you expected me to know what you meant on that day. I reached out to Elizabeth and Kaleigh based on what I had heard and understood, but somehow it was interpreted quite differently today. Please help me understand where I went wrong and how I can improve on it. Thank you so much.

++

Summary:

It seems like the things have gone off track between my superior and myself

It appears that there is some sort of personal issue against me - no matter what I do, is always wrong. For example, if I provide too much detail, it is interpreted as too much information, you should have never done it that way. But when I present it in a summarized format, the response I get it, why did you kept it a high level, you should have detailed in it.

When I try to be transparent with this individual, e.g., explain the approach I took to resolve an issue (asking detailed questions to Elizabeth Chu and Kaleigh Ward regrading WellMed Central Quality SQL95 Assessment project), it is construed as if I'm a total moron - a know nothing, I'm coerced to enter the information, this individual has put together, in my HR record.

Whenever we work together, he is always so impatience, treats me like a child - anytime I don't work exactly as he thinks I should, he starts making sounds of disgust, sometimes even yells. He put so much pressure that I can't even think straight.

Here is the latest incident - the superior has a 1-on-1 with me on a weekly basis, sometimes delayed due to his availability. He wants me to enter whatever his comments and feedback are into my HR record. He wants me to do it for every meeting that I have with him. He told me that he is implementing this policy across all his direct reports. It will be interesting to find out whether it is being implemented throughout all his areas of supervision or just an individual. It makes me wonder what is the purpose of these 1-on-1 meetings? Is it to provide the guidance and leadership for everybody and the organization to succeed or is it just to build cases against individuals? If this is going to be a policy, shouldn't it be approved by his leadership and published across the organization?

BTW, I have been in the IT industry for 35+ years, I have never ever encountered a situation where a manager has a 1-on-1 with his direct reports and mandates that the reportee enters the summary of this meeting in his/her HR record. The motive behind this unique approach seems to be opaque.

He is my superior and I respect him for that. I expect him to be my guide and my mentor so that I can do my best to make the best contribution possible for the success of the organization. But, if this individual is always looking for reasons to berate me, try to demonstrate how stupid I am, then it is hard for me to succeed. Ever since this situation has arisen, I am always second guessing myself. I dread when I have to meet with him on 1-to-1 basis. I focus more on how to please him rather than how I can make the best contribution possible; be properly guided to succeed personally and organizationally. I love Optum as a company where I feel, I can excel and make positive contribution to the success of it, I would really like to resolve it amicably and stay here for a long time and be a positive contributor.

++

RE: WellMed Central Quality - SQL95 Assessment proposal

CD Cheema, Dave
To Shin, John S

Reply | Reply All | Forward

Wed 6/18/2025 1:05 PM

Thank you so much for this encouraging email.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, June 18, 2025 1:02 PM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Re: WellMed Central Quality - SQL95 Assessment proposal

Hi Dave,

Your response seems to confirm my observations, and I would like to clarify my guidance to you that you should not hesitate to do what you believe is appropriate to be a leader on the team.

I can understand your frustration and perspective that you are being criticized BUT I think if you could adjust your perspective and take it as guidance, maybe it

Hi Dave,

Your response seems to confirm my observations, and I would like to clarify my guidance to you that you should not hesitate to do what you believe is appropriate to be a leader on the team.

I can understand your frustration and perspective that you are being criticized BUT I think if you could adjust your perspective and take it as guidance, maybe it will help your mindset and ability to make appropriate behavioral adjustments.

As I guided you on our 1-on-1 multiple times, focus on the lesson learned and what could have been done better NOT shutting down and being hesitant to take action.

Let's continue to work together as part of the CAP and see if we can make progress together.

Thanks,

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Date: Wednesday, June 18, 2025 at 12:16 PM
To: Shin, John S <john.shin@optum.com>
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John,
Thank you for those observations. In general, in my desire to ensure that no opportunity is jeopardized, I reach out to my leadership for counsel when needed. Is that not the right approach? I have responded to the things you pointed out inline, starting with [DC] - , in Blue. Please take a look at them and let me know your thoughts. Thank you.

Regards,
Dave Cheema

From: Shin, John S <john.shin@optum.com>
Sent: Wednesday, June 18, 2025 10:57 AM
To: Cheema, Dave <dave.cheema@optum.com>
Subject: Re: WellMed Central Quality - SQL95 Assessment proposal

Hi Dave,

I know from our last 1-on-1 conversation that you are hesitant and unsure about taking initiative on your own… I don't think that is the mindset that will help you be successful.
[DC] - It is not that I can't take those initiatives on my own, but the challenge for me is that no matter what I do is wrong. It is the constant criticism and nitpicking of every little thing that has made me second guess what I do.

For a direct example, arranging a live convo with appropriate folks on the client side should be an obvious next step. If you need support for that conversation, you should add us as needed and give us a heads up on what the conversation needed is… not come to us with a what should I do here type of ask.
[DC] - I felt that a wrong response could jeopardize this opportunity; to prevent from such happening, I sought your advice. To you, setting up a meeting was the obvious choice; for me, she was asking me for a response, and I wanted to provide an appropriate response and did not want to jeopardize this opportunity, so I reached out to my leadership to get proper guidance, instead of getting criticized for it.

Another example is when you weren't being proactive about following up with Elizabeth a couple weeks ago and instead just waiting for Elizabeth to come back.
[DC] – Again – I did not want to jeopardize this opportunity by excessively pinging her and turning her off. Because too much pinging can turn people off and a sign of desperation.

Please give this some consideration.

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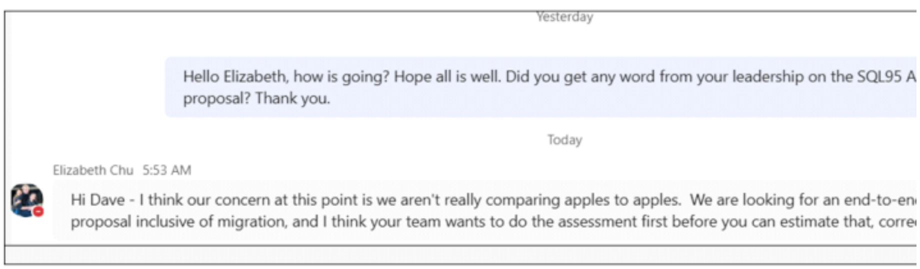

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