**UHC Discussion 02/02/24- Key Takeaways**

* **Source of Bartrack reports-** There is another application that sales have access to where they enter and change data, which is later transferred to SharePoint for auditors to use as the primary data source. This constitutes as the actual source of the bartrack reports.
* **Fields to audit**- Approximately 40-45 fields on the workflow sheet undergo auditing. These fields remain consistent across groups in various states and are accessible in the CIRRUS database, also reflected in the PowerBI report.
* **CIRRUS data extraction**- From the original database, all the data was pulled into a PowerBI Dashboard using 8-10 SQL queries. There are a couple dozen tables joined in many ways, and we need to extract relevant fields and values from these tables. The audits primarily focus on plan level details, with the MNS designation ID as a key value in the WHERE clause to retrieve active plans. Queries for extracting MNS plans from CIRRUS have already been written, and filters and/or clauses can be modified based on the relevant fields and active plans that we need. (*Note- One can either decide to go to the CIRRUS system by querying from the tables, or by scraping data from the web. But scraping may not be possible because data keeps getting updated and it changes the dynamics of the page. Tables are more reliable in that case.*)
* **Handling the Urgent Care field**- Urgent Care field is either not present or not updated in the Bartrack reports, so for that we need to find out the information from the standard plans. Correlating Standard Plan names with MNS plans can be challenging, but the tracking ID of standard plans is given in the bartrack reports.
* **Portfolio grids-** Standard Plan data is housed in portfolio grids, offering standardized copay and other details. While MNS plans lack consistency, the portfolio grid serves as a uniform source of truth. Data extraction can be done from tables that were used to create the portfolio grid using queries.
* Discrepancies between bartrack and CIRRUS values leads to deciding on whether to audit and change their values or flag them as an error. The auditing process specifics are yet to be finalized.

**Way forward:**

The starting point would be to use queries on the CIRRUS database to get the data for active plans, both MNS and standard plans. Since the PowerBI dashboard contains all the required fields for auditing, we can use that to look at the month, groups, corresponding MNS plans, and fields, and use queries to join tables based on that. After that, we can extract information about standard plans based on the tracking ID of the bartrack system.

**Further points of discussion-**

* Need IT Access for Bartrack reports
* Need the list of fields to be audited
* Need to list down and see the CIRRUS tables and their structure and volume
* Prefer to see one end to end audit process.