



INTERACTIVE INSTITUTES **2020**

BUILDING AND SUSTAINING A CULTURE OF HIGH-QUALITY DATA

Leaving a Breadcrumb Trail on the Path to Data Quality



IDEA DATA
CENTER

Collect, Report, Analyze, and
Use High-Quality Part B Data



Presenters



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Have You Ever Asked...

- Where can I find the trail of data quality?
- How did that data get here?
- Will we ever find our way through the data quality forest?



Business Rules Are...



The breadcrumbs guiding you through the woods...



...and the next frontier in data process documentation.



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What to Expect Today



- A brief overview of the role of business rules
- An introduction to IDC's *Business Rules Documentation Protocol*
- Sharing of state experiences with business rules
- Small group discussion and reflection on next steps



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What Do We Mean by Business Rules?



- Sometimes called “edit checks”
- Logic used to validate data
- Strategy for improving data quality
- Often automated



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Ways Business Rules Help Improve Data Quality

- Prevent



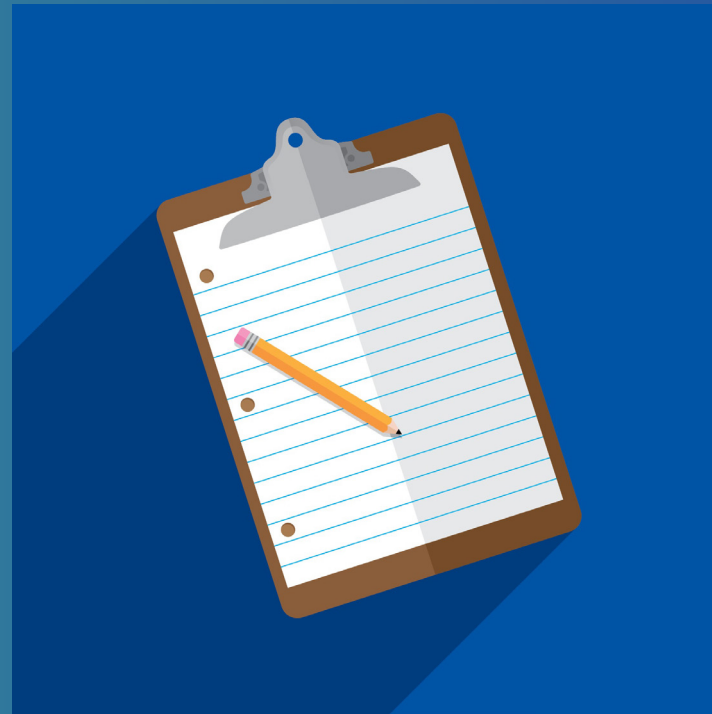
- Detect



- Repair



Documenting Business Rules



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Why Document Business Rules?

- Ensure common understanding about data requirements
- Improve communication with those submitting data
- Confirm automated business rules are working properly
- Increase transparency with internal and external stakeholders
- Provide data users insight into the quality of the data

Beneficial Outcomes of Documentation

- Ensures consistency
- Provides early detection of potential data issues
- Streamlines postsubmission data processing and validation
- Increases confidence in data used for decisionmaking and results-driven accountability

Other Best Practices

- Create a business rules repository
- Conduct annual reviews and updates
- Create process documentation
- Create data flow diagrams
- Create documentation repositories with versioning (examples: SharePoint, Huddle, Box)

IDC's *Business Rules Documentation Protocol*



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IDC's *Business Rules Documentation Protocol*

- Is an Excel template that states can modify to meet their needs
- Is used to document, record, and communicate business rules
- Includes a change log to track changes over time

Business Rules Documentation Elements



- Rule ID
- Data elements
- Edit type or severity
- Error message
- Error definition or logic
- Topic or content area
- Data steward
- Date first implemented
- Approval required (Y/N)
- Notes



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Change Log Elements

- Rule ID
- Date revised
- Revised by
- Changed from
- Changed to
- Reason for change



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How IDC Can Help

IDC will help facilitate the process by

- Organizing in-person meetings
- Asking directed questions
- Serving as recorder to document the protocol
- Highlighting areas for further discussion
- Following up to maintain protocol

State Example: Business Rules Documentation in Illinois



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Determination of Need



- Data discrepancies among Report Card, 616 data, and 618 data
- Data ownership—review of data prior to submission
- Division of duties for data provisioning
- Risk management—business continuity desired
- Data consistency desired



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Approach



- Internal SEA resolution
- IDC resolution—Data Processes Toolkit/Business Rules
- SEA Special Education Data Governance (SEDG)
- SEDG monthly meeting—Issue Log and Accountability
- SEDG in place for 3 or more years—still going strong



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Participants



- IDC resources (2–4 people)
- Special education executive director (SEA)
- Special education director (SEA)
- IDEA Part B State Performance Plan (SPP) and State Systemic Improvement Plan (SSIP) coordinator (SEA)
- IDEA Part B data manager (SEA)
- Information technology (IT) resources (employees and contractor) (SEA)
- SEA data governance resource



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Outcome



- SPP Indicator Business Rules finalized in 2019
- *EDFacts*, *EMAPS*, and Significant Disproportionality Business Rules completed and under review
- Next step identified: Get technical specifications from IT
- Process for annual updates defined
- Data consistency and presubmission approval achieved



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Questions?



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Small Group Discussions



Create triads and discuss in your small group

- Has your state documented business rules for any data collections? If yes, what were the benefits?
- How do you feel documenting business rules would help your state?
- What are your goals for documentation of business rules?
- If you were to start documenting business rules for a data collection, which rule would it be and why?
 - Who should be at the table to document business rules for the data collection you selected?
- How might documentation of business rules fit in with data process documentation?



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Where to Find the *Business Rules Documentation Protocol*



Located on the *SEA Data Processes Toolkit* page of IDC's website:

<https://ideadata.org/sea-data-processes-toolkit>



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For More Information



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