

Operations Process Instruction Manual

Indicator Dictionary Process Instruction

Policy:

Indicators are measures used in reports generated by TGLN. Indicators are defined by TGLN Business units, but are developed in association with the TGLN's Informatics Department. The Informatics Department is the custodian of the indicators and is responsible for managing the processes of creation, revision, review and retirement of indicators. Indicators are created and changed as a function of the report generation process. All Indicators at TGLN are housed in an Indicator Dictionary.

For the purposes of this instruction the Indicator Owner can be any member of TGLN's management function or by an external data requestor.

Process:

General

1. The Indicator Dictionary is to be used by data requestors and/or the Informatics Department to identify either existing indicators for use in reports, identify indicators that need to be added that don't already exist and to ensure the definitions of indicators are current prior to their use in a report.

Addition of an Indicator

2. The Indicator Owner (IO) defines a new indicator with a descriptive name and a description that is in non-technical language (i.e., Business Definition).
3. The IO submits this new indicator to the Informatics Department for registration in the Indicator Dictionary. At this time, the IO also indicates who the users of this indicator will be. This can be done through the Data Request Process (*OPI-9-300, Data Request Process Instruction*).
4. The Informatics Intake Coordinator (IIC) or designate adds the new indicator to the Indicator Dictionary and sets its status to "Draft".
5. The Informatics Analyst (IA) or designate develops the technical definition of the indicator and completes all associated metadata in the Indicator Dictionary.
6. The IA or designate provides the draft indicator to the IO for approval and changes the status to "Pending Approval". If other users are indicated to be involved in the review, the IO reviews the

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draft indicator with them and makes adjustments as necessary. If adjustments are made by either the IO or the other reviewers, the IO and IA work together to finalize the indicator.

7. When the IO approves the indicator, the IIC or designate assigns the version number of "1.0" to the new indicator and changes its status from "Draft" to "Approved" in the indicator dictionary.

Revision of an Indicator

8. Any user of an indicator can request a change to an indicator.
9. The IIC or designate informs the IO that a request to change their indicator has been made in cases where the user is not the IO. The IO can either approve the request for change or reject it. In cases that the IO rejects the change request, they must provide a rationale which will be shared with the requestor. If the user insists that the changed indicator is required, they are advised by the IIP to submit a new indicator request with a unique name.
10. The IIC or designate identifies if there are other users of this indicator. If there are other users and they will be impacted by the change, they are consulted with on the changes. If the other users disagree with the changes, the IIC or designate facilitates reconciliation between the various users of the indicator. If an impasse occurs, the IIC or designate advises the user and/or IO submit the change as a new indicator.
11. The IA or designate checks the indicator out and sets its status to "Draft". If the old definition and the new definition are temporally valid, the new definition is appended to the existing definition and temporal boundaries are stated.
12. The IA or designate submits the revised indicator definition to the IO for review and approval. If there are concerns with the revised indicator definition, the IA or designate works with the IO to adjust the definition.
13. The IO approves the indicator and the IIP or designate increases the revision level of the indicator, changes the status of the indicator to approved and checks back in the indicator.
14. The IA or designate revises all reports where the updated indicator is used.

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Periodic Review of an Indicator

15. On a periodic basis (e.g., annually), the Informatics Department will request review of the indicator definition for currency and validity by the IO.
16. The IO completes their review and determines if the indicator is current, requires revision or requires retirement.
 - 16.1. If the IO determines that the indicator is current, they notify the IIP or designate that the indicator is current.
 - 16.2. If the IO determines the indicator requires revision, they will notify the IIP or designate that changes are required and initiate the indicator revision process. The IIP or designate will change the status of the indicator to “Pending Revision”.
 - 16.3. If the IO determines the indicator requires retirement, they will notify the IIP or designate who will change the status to “Pending Retirement” and initiate the indicator retirement process.
17. Once the IIC or designate is notified the indicator review is completed, the IIC or designate will update the review date to indicate the indicator has been reviewed.

Retirement/Reassignment of Ownership of an Indicator

18. The IO or any user of the Indicator Dictionary can propose the retirement of an indicator. Requests for retirement are sent to the IIC or designate.
19. The IIC or designate reviews the retirement request and determines if there are other users of the indicator. If there are other users of the indicator, the IIC or designate notifies them that there has been a request to retire the indicator and asks if they still require the indicator. If it is determined that they still need to use the indicator, then ownership is re-assigned in cases where it was the IO that requested the retirement of the indicator. In this situation, the IIC or designate assigns the task of removing the retired indicator from the IO’s reports (where required) to an IA.
20. If other users agree that the indicator can be retired, then the IIC or designate sends a request to the IO to approve the retirement.
21. The IO completes the approval of retirement along with the rationale for retiring the indicator.

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22. The IIC or designate once receiving the approval to retire the indicator, then changes the status of the indicator to retired and assigns an IA to make changes to reports where the retired indicator appears.

Records:

Record Name	Form No. (if applicable)	Record Holder	Record Location	Record Retention Time (as a minimum)
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None

References:

- *Data Request Process Instruction, OPI-9-300*