CASE STUDY

Delta Dental of Virginia Leverages Pentaho for Claims Processing

By Implementing Pentaho Business Intelligence, Delta Dental of Virginia Reduces Costs and Provides Employees with Better Access to Data

About

Dental Dental of Virginia (DDVA) was first incorporated in Virginia on January 6, 1965. DDVA's principal focus has been affordability and access to quality oral health care for over 45 years. Dental Dental of Virginia is a member of the Delta Dental Plans Association. The 39 Delta Dental Plans Association member companies work to improve oral health for enrollees in all 50 states and the District of Columbia by emphasizing preventive care and making quality, cost-effective dental benefits available to individuals, large and small employers and other groups. Collectively, Delta Dental member companies serve more than 54 million enrollees in over 93,000 groups.

DELTA DENTAL®

QUICK FACTS

- Industry: Insurance, Healthcare, NonProfit
- Headquarters: Roanoke, Virginia
- Website: deltadentalva.com
- Products/Services: Pentaho BI Suite, Pentaho Reporting, Pentaho Dashboards, Pentaho Analysis, Pentaho Data Integration

Challenges

As Director of Software Development at Delta Dental of Virginia, John Sheffield leads a department that is responsible for any software offering developed and used by the company. When he arrived at DDVA almost four years ago, he started to search for an open source, business intelligence tool to replace a proprietary tool that had not met the company's needs. Sheffield wanted something that he could get off the ground quickly and that could be integrated with the company's various customer-facing programs as well as its internal business applications. Consequently in 2007, DDVA licensed Pentaho Business Intelligence Enterprise Edition V 1.5; the company also deployed Pentaho Data Integration (PDI) Community Edition to handle its numerous integration points internally and externally. "Pentaho is a great partner," says Sheffield. "In 15 months, its open source BI got us to management reporting for our groups through our website. A lot of this success had to do with business users understanding the capabilities of the technology."

Solutions

- Pentaho BI Enterprise Edition - Sheffield licensed the gold level subscription from the get-go in order

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>
> – JOHN SHEFFIELD
> *Director of Software Development, Delta Dental of Virginia*

to take advantage of Pentaho support services. As DDVA extends its software programs, the company has come to use every aspect of the Pentaho BI Suite.

- Pentaho Reporting - The company's website software, a key component of DDVA's customer service, incorporates Pentaho Reporting. Much more than a marketing tool, the DDVA website integrates tightly with the claims processing system so that members can check the status of their claims and DDVA administrators can pull reports from the site. This interactive site is refreshed monthly with new data and has been so successful that other Delta Dental member companies have asked Sheffield's team to write their Web software, too.
- Pentaho Dashboards - An essential part of the company's internal reporting and decision-making platform, Pentaho Dashboards are used to create management reports in the company's Metric Analytic and Research System (MAARS) tool to provide insight into fraudulent behavior, from which dashboards are created for compensation compliance Business Analytics is then used in conjunction with CDF to build the reports and dashboards from the data warehouse.
- Pentaho Analysis - DDVA leveraged the Pentaho Analysis OLAP server, (Mondrian) to create a self-service tool for business users. As a result, users from multiple departments can extract data from different sources and turn that data into reports without ever having to contact IT. DDVA replaced Oracle Discoverer with Pentaho Analysis, which Sheffield says "is a more intuitive tool for our knowledge workers to analyze data and create ad-hoc queries."
- Pentaho Data Integration (PDI) - DDVA began using the standalone community version of PDI (Kettle) in 2007, then migrated to PDI Enterprise Edition as part of the BI suite subscription in order to get the bene# ts of Pentaho professional support. They use PDI for batch processing chores, such as billing and invoicing that run once a week. DDVA was able to replace a propriety application with PDI, which basically allows them to capture data, then transform it to a different file.
- Pentaho Support Services – DDVA has had Pentaho on site to help explain to business users how to use their tools and the programs that Sheffield's team has developed for them. "Pentaho support is as good as its software," Sheffield says. "First, we haven't needed it a lot, and second, when we needed it we got it."

Results

- Cost reductions – Sheffield explains, "It's been much less expensive for DDVA to deploy Pentaho over other commercial solutions."
- High value – Pentaho has helped Sheffield's team deliver what was needed in a short amount of time. Once they got successful with management reports, they got the green light to pursue Pentaho in other areas.

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- Easy to integrate – As a development platform, Pentaho has been relatively easy to integrate into both the DDVA claims processing system and Web software. Pentaho has a great API and SDK; both work reliably.
- Easy to use – Pentaho's real value to DDVA's business is that it provides business users with a tool that they can use on their own to mine data; especially with Pentaho Analysis.
- Automation – Pentaho has enabled DDVA to automate many previously manual tasks.
- Transformative – Pentaho has precipitated a cultural shift at DDVA, whereby better access and use of data has transformed employees into knowledge workers.

Summary

During his four years as Director of the Software Development, Sheffield and his team have helped DDVA extend its DCS2000® claims processing system, as well as its customer-focused, interactive website. DCS2000 has been so successful that several other Delta Dental member companies either license the software or utilize it through SaaS. Sheffield's next step will be to enhance his client/server DCS2000 with better Web functionality. He's planning on replacing Chrystal Reports with the Pentaho reporting engine for transactional and analytical reporting. "As we move forward, Delta Dental of Virginia will incorporate Pentaho more into our transaction reporting. I love that an open source product has incorporated Agile development and can do such a great job," says Sheffield. "We compete against other, often larger, carriers. Our great customer service and software systems help us win. Adoption of our systems by other member companies allows them to do the same and testifies to the effectiveness of what we have built." Sheffield also has rolled out Pentaho BI capabilities internally where the most active users are Underwriting, Marketing, Operations and Finance. Over time, Sheffield wants to leverage Pentaho BI to automatically pull more data from core systems, such as Great Plains, and replace the use of spreadsheets for data reporting and analytics. "We've tried a few solutions to meet our needs around BI. For one reason or another, they have come up short. Pentaho has been able to effectively and efficiently meet all our needs, as well as exceed a few, for BI," says Sheffield.

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