

Provider Services Module for DPHHS MPATH

SECTION 4: Offeror Qualifications *November 16, 2017*



**Montana Department of Public
Health and Human Services
(DPHHS)**

RFP #: DPHHS-RFP-2018-0127JT

Submitted to:
**Montana Department of Public Health
and Human Services (DPHHS)**
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***Submitted via Montana Acquisition
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Table of Contents

4	SECTION 4: OFFEROR QUALIFICATIONS.....	4-1
4.1	State's Right to Investigate and Reject	4-1
4.2	Offeror Qualifications	4-1
4.2.1	References.....	4-1
4.2.2	Company Profile and Experience	4-6
4.2.3	Resumes	4-10
4.2.4	Offeror Financial Stability	4-50
4.2.5	Oral Presentation/Product Demonstration/Interview	4-61
4.2.6	Equal Pay for Montana Women.....	4-61

List of Tables

Table 4-1:	Resume: Project Manager - Anthony Chough.....	4-11
Table 4-2:	Professional References Anthony Chough	4-13
Table 4-3:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-14
Table 4-4:	Resume: Contract Manager – Michael Helmeke.....	4-15
Table 4-5:	Professional References - Michael Helmeke	4-17
Table 4-6:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-18
Table 4-7:	Resume: Integration Lead - Leonid Marushevskiyi	4-19
Table 4-8:	Professional References - Leonid Marushevskiyi.....	4-21
Table 4-9:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-21
Table 4-10:	Resume: Testing Lead – Syed Raza.....	4-22
Table 4-11:	Professional References – Syed Raza.....	4-26
Table 4-12:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-27
Table 4-13:	Resume: Certification Lead – Sheri Withrow	4-28
Table 4-14:	Professional References - Sheri Withrow	4-30
Table 4-15:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-31
Table 4-16:	Resume: Project Manager - Anthony Chough.....	4-32
Table 4-17:	Professional References Anthony Chough	4-34
Table 4-18:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-34
Table 4-19:	Resume: Contract Manager – Michael Helmeke.....	4-36
Table 4-20:	Professional References - Michael Helmeke	4-38
Table 4-21:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-39
Table 4-22:	Resume: Technical Manager - Leonid Marushevskiyi.....	4-40
Table 4-23:	Professional References - Leonid Marushevskiyi	4-42
Table 4-24:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-42
Table 4-25:	Resume: Operations Manager – Teha Hatfield	4-43
Table 4-25:	Professional References - Teha Hatfield	4-47
Table 4-26:	Key Personnel and Resources Requirements: Attachment F – Requirements Matrix	4-49



List of Figures

Figure 1: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017	4-53
Figure 2: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017	4-54
Figure 3: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017	4-55
Figure 4: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017	4-56
Figure 5: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017	4-57
Figure 6: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017	4-58
Figure 7: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017	4-59
Figure 8: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017	4-60
Figure 9: Certificate for Equal Pay for Montana Women	4-63

4 SECTION 4: OFFEROR QUALIFICATIONS

All subsections of Section 4 require a response. The Offeror must indicate certification of understanding for Sections and the offeror must restate the subsection number and the text immediately prior to your written response.

4.1 State's Right to Investigate and Reject

The State may make such investigations as deemed necessary to determine the Offeror's ability to provide the supplies and or perform the services specified. The State reserves the right to reject a proposal if the information submitted by, or investigation of, the Offeror fails to satisfy the State's determination that the Offeror is properly qualified to perform the obligations of the contract. This includes the State's ability to reject the proposal based on negative references.

HHS Technology Group (HHS Tech) understands the requirement and will comply.

4.2 Offeror Qualifications

To enable the State to determine the capabilities of an Offeror to provide the services specified in the RFP, the Offeror shall respond to the following regarding its ability to meet the State's requirements. THE RESPONSE, "(OFFEROR'S NAME) UNDERSTANDS AND WILL COMPLY," IS NOT APPROPRIATE FOR THIS SECTION.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

For the purposes of Offeror Qualifications, the Offeror must include company information, references, financial information, and other qualification information and materials for the entity that will be the actual Contracting Entity. For example: if corporation XYZ chooses to bid, and it plans to have its wholly owned affiliate ABC sign the contract, the proposal must include references, qualifications, financial and other reference information for the ABC affiliate. XYZ can also submit qualification material from XYZ Corporation but it won't be considered in evaluating the actual Contracting Entity.

4.2.1 References

Offeror shall provide a minimum of 3 (three) references that are currently using or have previously used products and/or services of the type proposed in this RFP. The references may include state governments, universities, or comparable private sector projects for whom the Offeror, within the last 3 (three) years, has successfully completed a healthcare related system implementation. At a minimum, the Offeror shall provide the company name, location where the products and/or services were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the products

and/or services provided, and dates of service. These references will be contacted to verify Offeror's ability to perform the contract. The State reserves the right to use any information or additional references deemed necessary to establish the ability of the Offeror to perform the contract. Negative references or the inability to contact the reference may be grounds for proposal disqualification. Provide the information above for each proposed subcontractor.

4.2.1.1 HHS Tech Reference 1:

Reference Name: Jeff Dean
Reference Title: Chief Information Officer
Reference Company: Arkansas Department of Human Services
Reference Phone: 501-320-3993
Reference email: jeff.dean@dhs.arkansas.gov

Project Name: Arkansas Eligibility and Enrollment Framework (AR EEF)
Project Time Period: 12/04/2012 – 1/31/2015
Products/Services Provided: COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, Training Lead, CMS Gate Review Support

Project Description and Responsibilities:

The AR EEF project was an initiative of the Department of Human Services to modernize their eligibility and enrollment system used for Medicaid/SCHIP and the Supplemental Nutrition Assistance Program (SNAP), which was required to support compliance with the Patient Protection and Affordable Care Act.

The HHS Tech Team led the architecture, design and implementation of the AR EEF solution. Key accomplishments included: 1) Design and implementation of Enterprise Architecture Framework Components ESB, MDM, and Consumer Communications; 2) Achieved the Federally mandated go-live dates of October 1, 2013 and January 1, 2014 for open enrollment; this included facilitation of SNAP for the October 2013 deadline; 3) Completion of required CMS ELC deliverables, documentation and gate reviews; 4) Implementation of the citizen portal and required integration points such as healthcare.gov, FDSH, etc.; and 5) Configuration and integration of required third party components to effectuate Medicaid enrollments in the Arkansas MMIS system.

The HHS Tech Team had primary responsibility for the integration of multiple COTS products to create the core functionality and enterprise architecture of the AR EEF. As the Systems Integrator and the DDI Lead, HHS Tech Team had project management responsibilities regarding the delivery of the solution. HHS Tech Team was responsible for creating and managing the project schedule, managing the project activity, managing the deliverables, managing documentation creation, co-managing the CMS gate reviews, and managing issues and risks.

The HHS Tech Team also provided requirements analysis services, thereby driving the elicitation of the solution requirements, documentation of those requirements, and gaining requirements signoff from the AR EEF Business Review Board.

The HHS Tech Team also delivered Quality Assurance services for the AR EEF solution. In addition to driving the requirements management process and documentation of the requirements, the Business Analysts were also contributors to defining the test cases that would exercise the requirements. Additionally, the HHS Tech Team led the testing efforts and provided test automation that was used by the AR EEF team.

From a software development perspective, the HHS Tech Team provided 10-11 Cúram Developers to augment the pre-existing IBM Cúram development team. This team of Cúram Developers helped build out the Cúram software application as well as Cúram business rules. The HHS Tech Team also developed the web services that were used for communicating across the AR EEF Enterprise Service Bus (ESB). From a system management perspective, the HHS Tech Team provided a few infrastructure staff to the AR EEF infrastructure team that was led by AR DIS.

4.2.1.2 HHS Tech Reference 2:

Reference Name:	Katie DeGrio Channing
Reference Title:	Contracts Manager and Legal Counsel
Reference Company:	MNsure
Reference Phone:	651-539-1976
Reference email:	katie.degriochanning@state.mn.us
Project Name:	MNsure
Project Time Period:	7/23/2012-3/15/2015
Products / Services Provided:	COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, UAT Lead, Training Lead, CMS Gate Review Support

Project Description and Responsibilities:

HHS Tech was an integral part of a coordinated effort by the State, contractors, and subcontractors to develop and implement the Minnesota's State-Based Marketplace, MNsure.

The HHS Tech Team fulfilled a role that would commonly be referred to as the Systems Integrator, in which The HHS Tech Team led the requirements, design, architecture and implementation of the MNsure solution. It included integration of all COTS products, the Federal Data Services Hub (FDSH), and integration with state systems such as MMIS, PRISM, MAXIS, SMI and other state verification resources. The HHS Tech Team was responsible for working with the State and

established and implemented the underlying architecture that delivered the SOA-based health benefit exchange for the State of Minnesota under the Patient Protection and Affordable Care Act. The specific enterprise architecture components implemented on this project were Enterprise Service Bus (ESB), Master Data Management (MDM), Identity Access Management/Single Sign On (IAM/SSO), Customer Communication (CC) and Business Rules Engines (BRE). The HHS Tech Team successfully completed all required CMS ELC deliverables, documentation and gate reviews, and achieved the Federally mandated go-live dates of October 1, 2013 and January 1, 2014 for open enrollment.

The HHS Tech Team also had project management responsibilities regarding the delivery of the MNsure solution. The HHS Tech Team's responsibilities included creating and managing the project schedule, managing the project activity including the sprints, managing the deliverables, managing all documentation creation, managing the development of the CMS gate review demo, and managing issues and risks. The HHS Tech Team was also tasked with tracking third-party vendors, their deliverables and project commitments. Throughout the project, The HHS Tech Team utilized a modified agile methodology approach to ensure incremental and rapid development and implementation throughout the process. The project had 3 sprint teams led by 3 Scrum Masters and the sprints were 5 weeks in length.

The HHS Tech Team also had database administration responsibilities in the lower environments (DEV & STEST). The HHS Tech Team built the install/update packages and scripts, and tested them on the lower environments. In the lower environments, the HHS Tech Team implemented the database design including creating tables, columns, data types, improved availability and response times, and created logical database designs which involved data architecture design, data modeling, and schema definition.

The HHS Tech Team also delivered Quality Assurance services for the MNsure solution. In addition to driving the requirements management process and documentation of the requirements, the Business Analysts were also primary contributors to defining the test cases that would exercise the requirements, and they participated in the actual testing. From a Quality Assurance perspective, The HHS Tech Team also defined, managed and led the State's User Acceptance Testing (UAT).

From a software development perspective, The HHS Tech Team custom-developed the BHP application for the MNsure solution. The HHS Tech Team also developed all of the web services that were used by all COTS products for communicating across the MNsure Enterprise Service Bus (ESB).

From a programming perspective, The HHS Tech Team performed extensive PL/SQL programming for the MNsure solution in order to develop the following:

- Event Model subsystem – an in-database event scheduling and management module with a PL/SQL API

- Universal Symantec Layer (USL) – Extended the semantic view layer with additional PL/SQL procedures to handle complex COTS system data processing
 - o Example: Re-assembling and cleaning the XML objects stored in Curam back into human readable form
- MMI (MNSure Master Index) – MDM for party entities with a PL/SQL API
- MMIS Data Prep Pipeline – a PL/SQL-driven process flow that moves eligibility data between the MNSure COTS modules and the state MMIS system
- FTI (IRS Data) protection – Designed and implemented PL/SQL-based Fine-Grain Access Control (FGAC) to restrict access to Federal Tax Information (FTI), leveraging Oracle Row-Level Security

Regarding Service Software Maintenance, the HHS Tech Team provided and still provides software maintenance services. The MNSure solution is still running HHS Tech products that are covered by active software maintenance contracts.

4.2.1.3 HHS Tech Reference 3:

Reference Name: Ennapadam Padmanabhan
Reference Title: IBM
Reference Company: Associate Partner
Reference Phone: (248) 202-8172
Reference email: padman@us.ibm.com

Project Name: Missouri Eligibility, Determination, and Enrollment System (MEDES)
Project Time Period: System (MEDES): 07/17/2013 - 05/18/2015
 MEDES Maintenance & Operations: 5/2015 - Present

Products / Services Provided: For the initial MEDES build: Prime contractor, COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, Training Lead, and CMS Gate Review Support. Presently: M&O infrastructure services

Project Description and Responsibilities:

As the employer of the original team that was selected to work with the Department of Social Services (DSS), the Family Services Division (FSD), and the Information Technology Services Division (ITSD) in the capacity of Prime Contractor and Systems Integrator, leading the integration of multiple COTS products to create the core functionality and enterprise architecture of the Missouri Eligibility, Determination, and Enrollment System (MEDES), HHS Technology Group continues to support the MEDES project in the role as a subcontractor to IBM for providing

infrastructure services as part of the IBM Maintenance & Operations (M&O) team for the MEDES system.

This subcontractor role commenced in May 2015 and is still ongoing. Release management, infrastructure support, database administration, IBM Cúram development, business analysis, security, QA, deployment engineering and server administration services are all provided to IBM as part of this contract.

In the prior role of Prime contractor and System Integrator, our team led the architecture, design and implementation of the MEDES solution, including the implementation of required integration points for the new integrated eligibility & enrollment (IE&E) system such as healthcare.gov, Federal Data Services Hub (FDSH), and numerous State interfaces.

4.2.2 Company Profile and Experience

Offeror shall provide documentation establishing the individual or company submitting the proposal has the qualifications and experience to provide the supplies and/or services specified in this RFP, including, at a minimum:

- a detailed description of any similar past projects, including the product/service type and dates the products and/or services were provided;*
- the client for whom the services were provided; and*
- a general description of the company including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this RFP;*
- Provide the information above for each proposed subcontractor.*

4.2.2.1 HHS Tech Group Profile

HHS Technology Group, LLC (HHS Tech) was formed in June 2017 for the purpose of assisting citizens achieve their full social and economic potential through the use of IT systems and services. HHS Tech initially acquired the software products developed by EngagePoint, Inc., an industry leader for the past 10 years in the design and delivery of modular IT systems, and has built onto that platform to enhance their overall set of software solutions. Although recently formed, the Company acquired significant software and IT Service contracts during its formation, which are currently part of day-to-day operations and IT service delivery functions.

The key individuals supporting these contracts are long-standing industry experts who lead HHS Tech's delivery of top-tier software and IT services. These contracts and supporting teams (approximately 100 personnel) are core to the vision, mission and values of the Company and are executed from four main offices in Sacramento, CA, Jefferson City, MO, Fort Lauderdale, FL, and Kiev, Ukraine. The Company also maintains satellite offices in New York, NY and Helena, MT.

4.2.2.2 HHS Tech Group Experience

4.2.2.2.1 HHS Tech Group Project Description 1: Arkansas - Eligibility and Enrollment Framework (AR EEF)

Project Time Period: 12/04/2012 – 1/31/2015
Products / Services Provided: COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, Training Lead, CMS Gate Review Support

Project Description and Responsibilities:

The AR EEF project was an initiative of the Department of Human Services to modernize their eligibility and enrollment system used for Medicaid/SCHIP and the Supplemental Nutrition Assistance Program (SNAP), which was required to support compliance with the Patient Protection and Affordable Care Act.

The HHS Tech Team led the architecture, design and implementation of the AR EEF solution. Key accomplishments included: 1) Design and implementation of Enterprise Architecture Framework Components ESB, MDM, and Consumer Communications; 2) Achieved the Federally mandated go-live dates of October 1, 2013 and January 1, 2014 for open enrollment; this included facilitation of SNAP for the October 2013 deadline; 3) Completion of required CMS ELC deliverables, documentation and gate reviews; 4) Implementation of the citizen portal and required integration points such as healthcare.gov, FDSH, etc.; and 5) Configuration and integration of required third party components to effectuate Medicaid enrollments in the Arkansas MMIS system.

The HHS Tech Team had primary responsibility for the integration of multiple COTS products to create the core functionality and enterprise architecture of the AR EEF. As the Systems Integrator and the DDI Lead, HHS Tech Team had project management responsibilities regarding the delivery of the solution. HHS Tech Team was responsible for creating and managing the project schedule, managing the project activity, managing the deliverables, managing documentation creation, co-managing the CMS gate reviews, and managing issues and risks.

The HHS Tech Team also provided requirements analysis services, thereby driving the elicitation of the solution requirements, documentation of those requirements, and gaining requirements signoff from the AR EEF Business Review Board. The HHS Tech Team also delivered Quality Assurance services for the AR EEF solution. In addition to driving the requirements management process and

documentation of the requirements, the Business Analysts were also contributors to defining the test cases that would exercise the requirements. Additionally, the HHS Tech Team led the testing efforts and provided test automation that was used by the AR EEF team.

From a software development perspective, the HHS Tech Team provided 10-11 Cúram Developers to augment the pre-existing IBM Cúram development team. This team of Cúram Developers helped build out the Cúram software application as well as Cúram business rules. The HHS Tech Team also developed the web services that were used for communicating across the AR EEF Enterprise Service Bus (ESB). From a system management perspective, the HHS Tech Team provided a few infrastructure staff to the AR EEF infrastructure team that was led by AR DIS.

4.2.2.2.2 HHS Tech Group Project Description 2: MNsure

Project Time Period: 7/23/2012-3/15/2015
Products/Services Provided: COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, UAT Lead, Training Lead, CMS Gate Review Support

Project Description and Responsibilities:

HHS Tech was an integral part of a coordinated effort by the State, contractors, and subcontractors to develop and implement the Minnesota's State-Based Marketplace, MNsure.

The HHS Tech Team fulfilled a role that would commonly be referred to as the Systems Integrator, in which The HHS Tech Team led the requirements, design, architecture and implementation of the MNsure solution. It included integration of all COTS products, the Federal Data Services Hub (FDSH), and integration with state systems such as MMIS, PRISM, MAXIS, SMI and other state verification resources. The HHS Tech Team was responsible for working with the State and established and implemented the underlying architecture that delivered the SOA-based health benefit exchange for the State of Minnesota under the Patient Protection and Affordable Care Act. The specific enterprise architecture components implemented on this project were Enterprise Service Bus (ESB), Master Data Management (MDM), Identity Access Management/Single Sign On (IAM/SSO), Customer Communication (CC) and Business Rules Engines (BRE). The HHS Tech Team successfully completed all required CMS ELC deliverables, documentation and gate reviews, and achieved the Federally mandated go-live dates of October 1, 2013 and January 1, 2014 for open enrollment.

The HHS Tech Team also had project management responsibilities regarding the delivery of the MNsure solution. The HHS Tech Team's responsibilities included creating and managing the project schedule, managing the project activity including

the sprints, managing the deliverables, managing all documentation creation, managing the development of the CMS gate review demo, and managing issues and risks. The HHS Tech Team was also tasked with tracking third-party vendors, their deliverables and project commitments. Throughout the project, The HHS Tech Team utilized a modified agile methodology approach to ensure incremental and rapid development and implementation throughout the process. The project had 3 sprint teams led by 3 Scrum Masters and the sprints were 5 weeks in length.

The HHS Tech Team also had database administration responsibilities in the lower environments (DEV & STEST). The HHS Tech Team built the install/update packages and scripts, and tested them on the lower environments. In the lower environments, the HHS Tech Team implemented the database design including creating tables, columns, data types, improved availability and response times, and created logical database designs which involved data architecture design, data modeling, and schema definition.

The HHS Tech Team also delivered Quality Assurance services for the MNSure solution. In addition to driving the requirements management process and documentation of the requirements, the Business Analysts were also primary contributors to defining the test cases that would exercise the requirements, and they participated in the actual testing. From a Quality Assurance perspective, The HHS Tech Team also defined, managed and led the State's User Acceptance Testing (UAT).

From a software development perspective, The HHS Tech Team custom-developed the BHP application for the MNSure solution. The HHS Tech Team also developed all of the web services that were used by all COTS products for communicating across the MNSure Enterprise Service Bus (ESB).

From a programming perspective, The HHS Tech Team performed extensive PL/SQL programming for the MNSure solution in order to develop the following:

- Event Model subsystem – an in-database event scheduling and management module with a PL/SQL API
- Universal Symantec Layer (USL) – Extended the semantic view layer with additional PL/SQL procedures to handle complex COTS system data processing
 - o Example: Re-assembling and cleaning the XML objects stored in Curam back into human readable form
- MMI (MNSure Master Index) – MDM for party entities with a PL/SQL API
- MMIS Data Prep Pipeline – a PL/SQL-driven process flow that moves eligibility data between the MNSure COTS modules and the state MMIS system
- FTI (IRS Data) protection – Designed and implemented PL/SQL-based Fine-Grain Access Control (FGAC) to restrict access to Federal Tax Information (FTI), leveraging Oracle Row-Level Security

Regarding Service Software Maintenance, the HHS Tech Team provided and still provides software maintenance services. The MNSure solution is still running HHS Tech products that are covered by active software maintenance contracts.

4.2.2.2.3 HHS Tech Group Project Description 3: Missouri Eligibility, Determination, and Enrollment System (MEDES)

Project Time Period:	Missouri Eligibility, Determination, and Enrollment System (MEDES): 07/17/2013 - 05/18/2015 MEDES Maintenance & Operations: 5/2015 - Present
Products/Services Provided:	For the initial MEDES build: Prime contractor, COTS Installation / Configuration / Integration, System Integrator, DDI Lead, Requirements Lead, Test Lead, Training Lead, and CMS Gate Review Support. Presently: M&O infrastructure services

Project Description and Responsibilities:

As the employer of the original team that was selected to work with the Department of Social Services (DSS), the Family Services Division (FSD), and the Information Technology Services Division (ITSD) in the capacity of Prime Contractor and Systems Integrator, leading the integration of multiple COTS products to create the core functionality and enterprise architecture of the Missouri Eligibility, Determination, and Enrollment System (MEDES), HHS Technology Group continues to support the MEDES project in the role as a subcontractor to IBM for providing infrastructure services as part of the IBM Maintenance & Operations (M&O) team for the MEDES system.

This subcontractor role commenced in May 2015 and is still ongoing. Release management, infrastructure support, database administration, IBM Cúram development, business analysis, security, QA, deployment engineering and server administration services are all provided to IBM as part of this contract. In the prior role of Prime contractor and System Integrator, our team led the architecture, design and implementation of the MEDES solution, including the implementation of required integration points for the new integrated eligibility & enrollment (IE&E) system such as healthcare.gov, Federal Data Services Hub (FDSH), and numerous State interfaces.

4.2.3 Resumes

A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subcontractors, who will be performing any aspects of the contract. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this RFP.

HHS Tech is pleased to present the following candidates as the Key Personnel team as required in Attachment F.

4.2.3.1 Project Manager (DDI /Certification Phase) – Anthony Chough

The Project Manager is a Key Personnel role that is responsible for the planning, execution, implementation, and staffing of the project. HHS's Project Manager, Anthony Chough, will represent and oversee the day-to-day activities of the project, serve as the Department's primary point of contact for matters relating to the project, and serve as a liaison for certification, collaborating with other contractors and stakeholders.

Mr. Chough has over 20 years of experience in Information Technology field. He is an accomplished product leader that brings together strategy, technology, and state of the art design to formulate game-changing ideas and chart a course of customer value and technical innovation. Additionally, he has delivered multiple, successful, state-based implementations with complex requirements on the tightest timelines. Mr. Chough has a Bachelor's Degree in Science.

Table 4-1: Resume: Project Manager - Anthony Chough

Resume: Anthony Chough	
Name	Anthony Chough
Title / Role	Technical Project Manager
Professional Experience	
HHS Technology Group	2017 to Present
Serves as HHS Tech's technical operations and project delivery executive for all current California customer sites. Mr. Chough is responsible for the planning, execution, implementation, and staffing management and serves as the single point of contact for the client on items including scope control, contract management, issue resolution, and project governance.	
EngagePoint, Inc.	2012 to 2017
Oversaw EngagePoint's Product Management and Global Application Development Team that spanned across North America, South America, Europe, and Asia. Accountable for the Program Administration and Program Modernization line of businesses. Serve as EngagePoint's technical operations executive across various customer sites. Drove the on-time launch of the Minnesota Health Insurance Exchange Platform for 2013 Open Enrollment	

American Health Tech, Inc.	2010 to 2012
Full P&L ownership as the top technology executive in the company charged with setting the product vision, architectural strategy, and roadmaps for all product lines. Establish the Project Management Office, Enterprise Architecture committee, Total Quality Management Process, and operational best practices for the company. Manage the day to day operations of Product Management, Product Design, Enterprise Architecture, Software Development, Quality Control, and Production Support. Established the AHT Enterprise Architecture leveraging HTML5/CSS3, Hybrid HTML5, Service Oriented Architecture, Enterprise Data Warehousing, Cloud Computing, and Web Services (JSON/XML).	
Health Market Science, Inc.	2007 to 2010
Implement changes in the business processes to match product demand with supply. Drive development roadmaps, priorities and schedule of product releases in conjunction with business units. Manage the day to day operations of Project Management Office, Enterprise Architecture & Engineering, Software Development, Infrastructure, Security, Compliance, and Support. • Established the company's Product/Project/Portfolio Management Office and the Enterprise Architecture Centers of Excellence. • Established the company's information security advisory committee and corporate Risk Mitigation Process. • Repositioned the core products from Data Sales and Software Sales to SaaS and BPO	
PNC Financial Services, Inc.	2000 to 2007
Business line CIO for PNC Wealth Management (formerly known as PNC Advisors), PNC Healthcare, and Treasury Receivables. Serve on executive oversight committees to provide leadership and align technology with business to maximize IT value. Responsibilities included strategic planning, developing operational roadmaps, managing system architecture, enterprise implementation, and providing business to technology transparency, and day-to-day operations including compliance and governance. Worked with ten distinct business silos to leverage common resources and set team strategy for implementation. • Direct supervision of 160 professionals across two corporate verticals and five offices across three US cities. Span of control over 200 IT professionals. • Delivered the PNC eHealthcare Platform applying LAMP technology to alleviate bandwidth, and storage constraints.	

Additional Experience	
Director Of Information Technology	Blattner Brunner, Inc. Pittsburgh, PA
Sr. Consultant	Generation Technologies, Inc. Pittsburgh, PA
Application Architect	Federated Investors, Inc. Pittsburgh, PA
Project Manager/Technical Lead	Frontier Systems, Inc. Pittsburgh, PA
Education	
Bachelor of Science General Science, Pennsylvania State University, University Park, PA	

Table 4-2 Professional References Anthony Chough

Professional References: Anthony Chough	
Name	Anthony Chough
Title / Role	Project Manager
Reference 1	
Reference Name:	Michael Nelson, Founder, Polaris Digital Partners
Reference Phone:	202-255-8778
Reference Email:	mdn0123@gmail.com
Reference 2	
Reference Name:	Partha Bommireddy
Reference Phone:	(609) 375-2489
Reference Email:	partha.bommireddy@adroitent.com

Table 4-3: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR08	The Contractor must designate a Project Manager to represent and oversee the day-to-day activities of the project. This individual shall serve as the Department's primary point of contact for matters relating to the project and serve as a liaison for certification, collaborating with other contractors, and stakeholders.	HHS Tech has submitted Anthony Chough as Project Manager for the DDI phase of this project. He will be the Department's primary point of contact and serve as the liaison for this project with contractors, stakeholders and DPHHS.
KR09	The Contractor's Project Manager must meet the following qualifications including: a. A minimum of seven (7) years' project management experience managing projects of similar size and scope, preferably in Medicaid or the healthcare industry. This experience must include relevant experience within the last three (3) years from the release date of the RFP. b. Project Management experience should include each phase of the system development life cycle. c. Project management certification through the Project Management Institute (PMI) is preferred.	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's proposed Project Manager, Anthony Chough, has over 20 years of experience in the Information Technology field. He has delivered multiple, successful, state-based Health and Human Services implementations with complex requirements on the tightest timelines. Mr. Chough has a Bachelor's Degree in Science.
KR20	The Contractor's Project Manager shall be required to perform work at the State's primary project location (e.g., city, state), unless approved by the Department to work remotely.	HHS Tech's Project Manager's main worksite will be at the State's primary project location. Any work done remotely will be approved in advance with the Department.

4.2.3.2 Contract Manager (DDI /Certification Phase) - Michael Helmeke

The Contract Manager for the DDI and Certification Phase is a Key Personnel role that is the Department's primary point of contact for all matters concerning the project Contract. HHS's Contract Manager, Michael Helmeke, will be responsible for project Contract performance, have the authority to make decisions that are binding to the Contract, be responsible for timely completion of the project, and be responsible for meeting all contractual obligations.

Mr. Helmeke has over 30 years of experience in Information Technology field. He is an experienced Contract Manager who brings together technical, project management, and strategy to deliver positive project outcomes. Mr. Helmeke has a Bachelor's Degree in Computer Science.

Table 4-4: Resume: Contract Manager – Michael Helmeke

Resume: Michael Helmeke	
Name	Michael Helmeke
Title / Role	Contract Manager
Professional Experience	
HHS Technology Group	2017 to Present
Executive responsible for overseeing contract management and account management. Mr. Helmeke is responsible for the company's performance and compliance with contracted responsibilities on a large Medicaid enrollment and eligibility state project. In this role, he oversees a team of 13 employees providing services to the prime vendor, a large systems integrator. He regularly and directly works contract and compliance personnel with the customer to perform contract review, management, changes and all contract legal matters. Mr. Helmeke works closely with customer management and executives to ensure key responsibilities are met or exceeded. Mr. Helmeke also supports select business development activities, driving the development of mutually agreeable scope and supporting contracts for proposed projects, including Statement(s) of Work, Master Agreements, Amendments, Flow-Down Agreements, BAAs, and other flow-down and related contract agreements.	
EngagePoint, Inc.	2014 to 2017
Oversaw EngagePoint's Contract Management for two of the company's largest clients including direct responsibility for contract performance and adherence and contract management.	

Mr. Helmeke frequently worked with company legal and business management in the development and negotiation of key contract artifacts supporting complex projects, including SOWs, work-breakdown plans, and professional services and licensing agreements.

Emdeon Business Services

2004-2005

As head of the Contracts group, he directly led the sales and complex contracting solutions (systems and BPO) for some of the largest Blue Cross and Blue Shield companies in the country.

Mr. Helmeke worked closely with Emdeon Corporate Legal staff in all contract matters, establishing a streamlined review and approval process after demonstrating successful contract management and oversight to new and existing clients post-acquisition.

Managed the executive level sales activities, contracting and legal, partner programs, marketing and HIPAA compliance.

Mr. Helmeke led scope development and high-level design effort to implement the large system HIPAA-compliant EDI Gateway system for WebMD/Emdeon. This system required a completely new HIPAA compliant front-end gateway, transaction management and reporting system integrated with disparate legacy backend systems to manage the nation's largest Claim / Authorization clearing house. He developed the initial scope of work and project plan, and continued to oversee the project in the executive role to ensure successful project completion.

Dakota Imaging, Inc.

2002 to 2004

Established a Contracts and Legal department and led the contract aspects of large sales processes for one of the leaders in the Medicare and private claims capture and processing area. Mr. Helmeke managed contracting and legal, partner programs, HIPAA compliance, business partner programs and due-diligence legal activities.

Dakota Imaging, Inc.	1988 to 1998
Led large services practice in business strategy assessments, business process re-engineering, and new technology and legacy system integration and solution design for large US and International clients. Often performed as Lead Consultant, Design Architect and Project Manager on many successful BPR and modernization projects, including claims processing, worker's compensation, state tax and other cross-industry applications.	
Additional Experience	
Partner and Co-Founder, 2005 - 2014	M&O Acquisitions, LLC., Baltimore Maryland (a real-estate company)
Federal Systems Programmer, 1985 - 1988	IBM Corporation, Gaithersburg, MD
Education	
Bachelor of Science Computer Science, University of Maryland, College Park, MD	

Table 4-5: Professional References - Michael Helmeke

Professional References: Michael Helmeke	
Name	Michael Helmeke
Title / Role	Contract Manager
Reference 1	
Reference Name:	Sandeep Goel
Reference Phone:	(307) 203-7778
Reference Email:	Sandeep.Goel@LightTreeFinancial.com
Reference 2	
Reference Name:	John Johnson
Reference Phone:	(410) 963-0460
Reference Email:	jhjohnso@us.ibm.com

Table 4-6: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR14	The Contractor must designate a Contract Manager to be the single point of contact for matters concerning the Contractor's performance under the Contract. This person shall have the authority to make decisions that are binding to the Contract, shall be responsible for timely completion of the project, and shall be responsible for meeting all contractual obligations.	HHS Tech proposes that Michael Helmeke serve as the HHS Tech Team Contract Manager for DDI. He will be the Department's primary point of contact for all matters concerning Contract performance, have the authority to make decisions that are binding to the Contract, be responsible for timely completion of the project, and be responsible for meeting all contractual obligations.
KR15	The Contractor's Contract Manager must have a minimum of five (5) years' contract management experience managing related services with similar budgets, preferably in Medicaid or the healthcare industry and for a project similar in size and scope to this project.	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's Contract Manager, Michael Helmeke, has over 30 years of IT industry and contract management experience.

4.2.3.3 Integration Lead (DDI / Certification Phase) - Leonid Marushevskiy

Mr. Marushevskiy will be responsible for leading integration strategy and implementation of the DyP solution. He will manage the design, configuration/build, integration, defect management, and implementation of the Contractor's scope of work.

Mr. Maurshevskiy has over 14 years of experience in Information Technology software development and implementation. He has led development and integration teams for multiple projects that required complex integrations with legacy systems across multiple organizations. Additionally, he is an expert in Agile/Scrum methodology. Mr. Marushevskiy has a Bachelor's Degree in Computer Science, a Master's Degree in Management Information Systems, and a Master's Degree in International Business.

Table 4-7: Resume: Integration Lead - Leonid Marushevskyi

Resume:	
Name	Leonid Marushevskyi
Title / Role	Integration Lead
Professional Experience	
HHS Technology Group	2017 to Present
Serves as HHS Tech's technical application development and integration leader for multiple complex Health and Human Services implementations such as Child Welfare, Integrated Eligibility and Enrollment for Medicaid and other programs. Leading multiple backend development and integration teams, Mr. Marushevskyi is responsible for the technical planning, architecture, design, integration and implementation for these projects. Some specific highlights include: - Responsible for setting design and developing backend platform to support functional modules - Responsible for developing product roadmaps, backlogs, and measurable success criteria, and writing user stories - Led teams of 6-10 people to assist in backend platform development	
EngagePoint, Inc.	October 2012 to May 2017
Served in multiple roles including technical architect, application development lead, technical lead, lead developer and Scrum Master in multiple complex Health and Human Services implementations. Some specific highlights include: - Successfully served as technical leader of a team of 10 developers to develop prototype application for Child Welfare Agile Pool selection - Successfully served as technical leader together of a team of 15 developers to develop prototype application Child Welfare Agile Development Pre-Qualified Pool selection - Responsible for web application development for Integrated Enrollment and Eligibility Solution. Developed web application using Java, designed and developed complex back-end for web application based on open-source technologies like Spring Batch, Hibernate, Drools, including the development and consumption of RESTfull APIs as well as relational databases (DB2). - Responsible for implementing test-driven deployment using Jenkins and several levels of automated tests like unit, integration and acceptance	

PrivatBank	2011 to 2013
Designed and led development of Antifraud solution for biggest Ukrainian bank Privatbank. Key highlights include: • Web application development using Java (a.), writing of complex back-end for Antifraud web application based on open-source technologies like Spring, Hibernate, MongoDB, developing and consumption of RESTfull APIs as well as non-relational databases document oriented database MongoDB • Web application development using Java, writing of complex back-end for Internet banking web application based on open-source technologies like Spring, Hibernate, Redis, developing and consumption of RESTfull APIs as well as relation (Sybase) and non-relational databases (key-value storage Redis)	
Lugansk Customs House	2003 to 2011
• Responsible for the design, development and testing of complex reporting web application for departments of Luhansk Customs House using technologies Java EE, Java SE, Oracle, PL/SQL • Responsible for development and performance tuning of statistical reports from the Oracle database using SQL and PL/SQL	
Education	
Bachelor's Degree in Computer Science, Academy of Customs Services, Kiev, Ukraine Master's Degree in Management Information Systems, Academy of Customs Services, Kiev, Ukraine Master's Degree in International Business, Ukrainian State University of Finance and International Trade	

Table 4-8: Professional References - Leonid Marushevskiy

Professional References: Leonid Marushevskiy	
Name	Leonid Marushevskiy
Title / Role	Integration Lead
Reference 1	
Reference Name:	Rajit Garg
Reference Phone:	410-852-2679
Reference Email:	garg.rajit@gmail.com
Reference 2	
Reference Name:	Kyle Martin
Reference Phone:	(540) 529-2505
Reference Email:	khmartin@vt.edu

Table 4-9: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR10	The Contractor must designate an Integration Lead to manage the design, configuration/build, integration, defect management, and implementation of the Contractor's scope of work.	HHS Tech proposes that Leonid Maurshevskiy serve as the HHS Tech Team Integration Lead. He will be responsible for managing the design, configuration/build, integration, defect management, and implementation of the Contractor's scope of work.
KR11	The Contractor's Integration Lead must meet the following qualifications including: a. Minimum of five (5) years leading system design and integration projects, including the technical design and implementation of projects similar in size and scope to this project. b. Experience must involve directing multi-discipline technical teams producing integration solutions (e.g., Service Oriented Architecture, network, hardware and software). c. A Bachelor's Degree in Information Systems Engineering,	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's proposed Integration Lead has over 14 years of experience in Information Technology software development and implementation. He has led development and integration teams for multiple projects that required complex integrations with legacy systems across multiple organizations. Mr. Marushevskiy has a Bachelor's Degree in Computer Science, a Master's Degree in Management Information Systems, and a Master's Degree in International Business.

	Computer Science, or a related field is preferred.	
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4.2.3.4 Testing Lead (DDI /Certification Phase) - Syed Raza

The Testing Lead is a Key Personnel role that is responsible for the planning, execution, and coordination of the testing activities for the HHS Tech's DyP solution implementation.

HHS's Testing Lead, Syed Raza, has over 15 years of experience working extensively in multiple industries including healthcare payer and provider networks. Mr Raza is a seasoned testing professional with project work in all aspects of testing including creating Test Strategies, LOE's, Test Plans, Requirements Reviews, Test Case Design Test Execution, Defect Management, Reporting and providing Sign Offs. Expert in managing Functional System, Integration, Regression, User Acceptance Testing and overseeing teams in geographically distributed environments. Additionally, he is a certified CSTE, SFS with an acquired certifications in Application Life Cycle tools including QC ALM, IBM Rational Suite, JIRA and other industry standard testing and the defect management tools. Mr. Raza has a Bachelor's Degree in Management Information System

Table 4-10: Resume: Testing Lead – Syed Raza

Resume: Syed Raza	
Name	Syed Raza
Title / Role	Testing Team Lead
Professional Experience	
CSG Government Solutions	June 2016 to Present
- Managed all aspect of system, Integration, performance and UAT testing efforts for the State of South Carolina - Participate in the requirement confirmation, iteration planning, product design and configuration sessions - Perform Fit-Gap analysis to evaluate the functional requirements, identify testing priorities and plan testing - Analyze and observe the testing process and made recommendations for process improvements - Assists team supporting the product development, testing, and defect management activities	

- Plan and provide training for the Business Users and facilitate User Acceptance Testing
- Managed test teams and worked with Business Users facilitating UAT efforts
- Implements test management matrices for gauging project performance
- Prepare reports and perform analysis on the testing results
- Review all functional and technical deliverables
- Provide staff and Users QA and UAT training

Performed testing in adherence to independent verification and validation (IV&V) best practices

- Shadowed testers and users during system testing for accuracy in testing results
- Followed up on the action items and provided recommendations for process improvement
- Attended tester huddles and project meetings related to the system testing and data conversion activities
- Prepared the bi-weekly test execution and status reports documenting the testing activities, observations, and made recommendations

Xerox Business Solutions

March 2015 to June 2016

- In charge of IT Quality Assurance and Quality Control operations, supporting both the onshore, the offshore development
- Providing and performing testing and oversaw release management activities
- Worked with all cross-functional teams and management to coordinate deliverables
- Planned and participated in all testing for Web Application/Services developed for .Net platform, EDI Transactions, files and formats (820, 834 and 837) for Medical and pharmacy claims, and other integrated applications for Medical Case Management
- Extensively worked and used SharePoint communicating with business user, vendor for requirement management resource schedules, product reviews issue tracking and managing contents.
- Successfully planned and tested ICD 10 implementation for all clients and TPAs
- Implemented a hybrid approach for testing and developing; migrated from a full lifecycle Waterfall development
- Develop and maintained quality metrics to measure quality and productivity of software applications and processes
- Planned UAT activities and facilitated business users to participate in functional testing
- Served on the board of directors for Xerox's Quality Improvement Committee
- Recognized for demonstrating functional knowledge of worker's compensation insurance claims, HIPAA, EDI, ICD, CPT and HL7
- Acknowledged for using Xerox's Global Delivery Model for staff augmentation and resource planning

EngagePoint/State of Arkansas	April 2014 – March 2015
	- Managed, planed and tested State Medicaid eligibility and determination application using IBM Curam - Participated in requirement reviews, change and defect management activities - Assisted state in validating the configuration and development changes made to the COTS product - Managed test team for Functional, Performance and UAT testing and validations for eligibility, benefits, open enrollment, social and entitlement programs - Implemented organizational changes for the QA organization and maintained quality standards throughout the development life-cycle. Performed reviews, hired, coached, and cross-trained team members - Assigned to work with the State of Arkansas on integrated development - Worked with business users to facilitate UAT activities for release and deployments - Performed testing for the household-specific data to support the eligibility and enrollment process across multiple programs. - Validate configurable rules, programs, processes, workflows and users, roles including Section 508 compliance - Tested and verified rules engine for the unique business and scalability requirements required by health care reform. - Perform data and MMIS validation through writhing extensive SQL quires - Conducted variety of testing utilizing the HYRID approach for development and testing throughout the product life cycle. - Assisted in implementing Defect Management Plan for triaging issues and performing the root cause analysis using RFT and JIRA - Implemented Automated Testing Framework (ATF) for regression testing utilizing a data-driven approach to debugging issues andefficiently recode tests. This involved Rational and Functional Performance testers - Worked with State Business users to facilitating UAT activities for all release and major deployments including sign-offs - Appointed to serve as a member of State Advisory Board due to a keen demonstration of initiative and interest
HealthPlan Services – Tampa, FL	April 2013 to April 2014
	- Analyzed requirements, created test cases and identified data for each project - Planned testing which includes estimating testing projects, setting deliverables, planning resources - Led all phases of testing, defect management and documentations - Effectively communicated project status, risks and issues with management - Supported multiple carriers for processing enrollment and benefit/policy administration

- Ensured that the testing performed (web, integration layer, backend, CSR and IVR systems) was in conjunction with State, federal exchanges and CMS guidelines
- Worked with all cross-functional teams and management to report the testing progress
- Coordinated testing for Middleware Integrated Applications and batch for processing for enrollments, changes, billings, and notifications
- Worked with XML, XSD mapping and validation using 820/834,837 transactions
- Identified and logged bugs using ALM Quality Center Test Management Tool
- Performed DB2 database validations for data and information accuracy
- Estimated projects, planned resource and set deliverables for all phases of testing

**Computer Task Group / BCBS
Mississippi**

Jun 2008 to April 2013

- Managed multiple client sites including QA testers, developers, web administrators, and graphic designers.
- Utilized background and expertise in testing and development to enhance coaching and training, for developing professional teams for projects
- Oversaw multiple projects, resources, and deliverables at any given time.
- Ensured that the CTG employee standards were maintained at all client sites; reached out to team members to de-escalate any potential issues and worked as a liaison between client and partner resources.
- Estimated projects, planned resource and set deliverables for all phases of testing
- Managed resources, schedules and budgets for all assigned clients
- Participated in weekly project meetings, business reviews, and product demos in order to capture adequate feedback.
- Received recognition for successfully bridging a gap between the contractors and clients.
- Lead and planned testing, analyzed requirements, performed verification and validation for healthcare applications including
- enrollment, eligibility benefits, group maintenance, provider access, e-Care Coordination, and drug formularies
- Participated in the requirement and code review meetings
- Authored test plans., created test cases, executed tests and performed reporting on the project progress and testing activities
- Triaged issues, participated in the defect reviews and managed defects using Quality Center Performed duties as a Field Service Manager on behalf of CTG for managing resources and delivery schedule on client site
- Gained experience in testing Content Management Systems (CMS), mobile applications, and mobile devices
- Consolidated the mobile testing experience for Blue Shield Blue Cross testing both the HTML and Native application development for Android, iOS and Smart devices

- Collaborated with BCBS to identify project requirements; articulated requirements to developers and project managers. Evaluated
- any production issues, assigned defects, and worked with developers on resolutions
- Provided support for integrated systems, ran batch processes, utilized WebFOCUS for reporting and performed DB2 validations
- Worked with SQL, DB2 and AS400 performing data validation for enrollment, benefits and pharmacy benefits.
- Facilitated UAT testing and assisted business users in identifying scenarios and test data

Additional Experience

Manager Quality Assurance	American Theater Corporation Apr 2005 to Jun 2008
Sr. QA Analyst	Target Corporation Jan 2002 to Apr 2005
Senior QA Engineer	RightWorks, Inc. Feb 2000 to Dec 2001

Education and Certifications

Bachelor of Science, Management Information System, Moorhead University

- Certified Software Tester (CSTE) – Quality Assurance Institute
- Scrum Fundamentals Certified (SFC) – SCRUM study, an accredited body of Scrum/Agile
- Application Lifecycle Management (ALM) Quality Center – Mercury Corporation
- IBM Rational Suite (RTC, RQM, RFT, RequisitePro and Requirements Composer – Ascendant , an IBM Partner

Table 4-11: Professional References – Syed Raza

Professional References: Syed Raza	
Name	Syed Raza
Title / Role	Testing Lead
Reference 1	

Reference Name:	Larry D'Addio
Reference Phone:	678-618-0211
Reference Email:	Larry.Daddio@aol.com
Reference 2	
Reference Name:	Jeff Garaci
Reference Phone:	716-912-5123
Reference Email:	Jrgeraci@msn.com

Table 4-12: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR12	The Contractor must designate a Testing Lead to coordinate all testing activities.	HHS Tech has submitted Syed Raza as Testing Lead for this project. All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role.
KR13	The Contractor's Testing Lead must meet the following qualifications including: a. Minimum of three (3) years experience leading testing activities for a project similar in size and scope to this project. b. In-depth understanding of the testing lifecycle and all artifacts required to successfully validate the system.	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. Syed Raza has over 15 years' experience working extensively across the testing lifecycle in multiple industries including healthcare payer and provider networks.

4.2.3.5 Certification Lead (DDI /Certification Phase)- Sheri Withrow

The Certification Lead is a Key Personnel role that is responsible for leading and coordinating all MCET certification activities for the Certification Phase.

HHS's Certification Lead, Sheri Withrow, is an accomplished Federal Certification Lead with over 22 years of experience including federal certifications, project management, business analysis, and VBA development. Ms. Withrow has an Associate's Degree in Science.

Table 4-13: Resume: Certification Lead – Sheri Withrow

Resume: Sheri Withrow	
Name	Sheri Withrow
Title / Role	Certification Lead
Professional Experience	
S&S Software at State of Illinois	2015 to present
Serves as Federal CMS Certification Lead (MECT 202) for Pharmacy Benefit Management System (PBMS) and Provider Enrollment (PE). Documents compliance utilizing MITA and MECT 2.2. Works with vendors, stakeholders and IV&V team to determine checklist items for each application.	
Levy, Ray and Shoup (LRS)	2013 to 2015
Worked for ADM, Transamerica and HD Smith in various roles from Sr. Business Solutions Analyst, Project Manager, as well as Sr. Business Systems Test Analyst. Performed Business Analysis using Software Development Life Cycle methodologies (SDLC), conducted business process mapping utilizing Visio and created roadmaps for design structure. Wrote test cases and scripts, prepared process and data flow models.	
Modis	2012 to 2013
Worked for AIG as a Sr. Business Analyst to ensure Federal Readiness for the Dodd Franks Act. Reviewed requirements for QA and change management. Prepared process and data flow diagrams. Validated compliance with Federal guidelines. Conducted data analysis mining and mapping using SQL and Toad. Wrote Cognos queries and reports for us in testing.	

FIS Software	2012 to 2012
Worked as a Sr. Systems Analyst and performed systems analysis on various platforms to ensure third party software implementation for their web-based application.	
Advantage Technical Resources	2011 to 2012
Worked as a Business Analyst and Test Lead and performed business analysis and testing in dual roles at program level using software development methodologies. Worked with Data Management to develop implementation plans for the data elements. Performed system, integration and regression testing.	
Custom VBA Services	2009 to 2011
Worked closely with IV&V to ensure data captured met Federal guidelines and expectations. Built evidence packets for MECT 2.2 checklist items. Identified necessary requirements for implementation of data platforms, web interface projects, hardware implementation and software upgrades.	
Keane Inc	2005 to 2009
Worked as a Federal PCI-DSS Certification Lead, Project Coordinator and Sr. Business Analyst. Performed project coordination and Business Analysis in dual roles at Program and Project levels using Software Development Methodologies at client site on up to 19 projects at a time. Led Federal certification process of the new Payment Card Industry Standards (PCI). Oversaw the overall health of multiple projects throughout the entire project lifecycle.	
Valtech Business Solutions	2004 to 2005
Worked as IT Director and Project Manager and was involved in planning, budgeting, software implementation, maintenance, hiring and project management. Ensured regulatory compliance with state contracts. Evaluated and implemented software and hardware packages.	

Additional Experience	
St. Business Analyst and VBA Database Developer	Withrow Database Design, Inc Springfield, IL
Project Manager and Business Analyst	Valcom/PCC Itasca, IL
Project Manager and Business Analyst	IBIS, Inc Schaumburg, IL
Application Architect	Federated Investors, Inc. Pittsburgh, PA
Project Manager/Technical Lead	Frontier Systems, Inc. Pittsburgh, PA
Education	
Associate of Science Lincoln Land Community College	

Table 4-14: Professional References - Sheri Withrow

Professional References: Sheri Withrow	
Name	Sheri Withrow
Title / Role	Certification Lead
Reference 1	
Reference Name:	Cynthia Gleason MMIS Bureau Chief State of Illinois
Reference Phone:	(217) 871-9637
Reference Email:	Cynthia.Gleason@Illinois.Gov
Reference 2	
Reference Name:	Greg Thomas
Reference Phone:	(217) 725-7113
Reference Email:	Gregory.Thomas@Illinois.Gov

Table 4-15: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR28	The Contractor must designate a Certification Lead to coordinate all certification activities.	HHS Tech is submitting Sheri Withrow as the Certification Lead for this project. The Certification Lead will bring specific experience and knowledge in provider enrollment, management, and support services.
KR29	The Contractor's Certification Lead must meet the following qualifications including: a. Minimum of three (3) years experience certifying systems against industry standards for projects similar in size and scope to this project. b. In-depth understanding of the most current MECT certification lifecycle required to successfully validate the system.	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's Certification Lead has over 22 years of experience including federal certifications, project management, business analysis, and VBA development.

4.2.3.6 Project Manager (Operations Phase) – Anthony Chough

The Project Manager is a Key Personnel role that is responsible for the planning, execution, implementation, and staffing of this project. HHS's Project Manager, Anthony Chough, will represent and oversee the day-to-day activities of the project, serve as the Department's primary point of contact for matters relating to the project, and serve as a liaison for certification, collaborating with other contractors and stakeholders.

Mr. Chough has over 20 years of experience in Information Technology field. He is an accomplished product leader that brings together strategy, technology, and state of the art design to formulate game-changing ideas and chart a course of customer value and technical innovation. Additionally, he has delivered multiple, successful, state-based implementations with complex requirements on the tightest timelines. Mr. Chough has a Bachelor's Degree in Science.

Table 4-16: Resume: Project Manager - Anthony Chough

Resume: Anthony Chough	
Name	Anthony Chough
Title / Role	Technical Project Manager
Professional Experience	
HHS Technology Group	2017 to Present
Serves as HHS Tech's technical operations and project delivery executive for all current California customer sites. Mr. Chough is responsible for the planning, execution, implementation, and staffing management and serves as the single point of contact for the client on items including scope control, contract management, issue resolution, and project governance.	
EngagePoint, Inc.	2012 to 2017
Oversaw EngagePoint's Product Management and Global Application Development Team that spanned across North America, South America, Europe, and Asia. Accountable for the Program Administration and Program Modernization line of businesses. Serve as EngagePoint's technical operations executive across various customer sites. Drove the on-time launch of the Minnesota Health Insurance Exchange Platform for 2013 Open Enrollment	
American Health Tech, Inc.	2010 to 2012
Full P&L ownership as the top technology executive in the company charged with setting the product vision, architectural strategy, and roadmaps for all product lines. Establish the Project Management Office, Enterprise Architecture committee, Total Quality Management Process, and operational best practices for the company. Manage the day to day operations of Product Management, Product Design, Enterprise Architecture, Software Development, Quality Control, and Production Support. Established the AHT Enterprise Architecture leveraging HTML5/CSS3, Hybrid HTML5, Service Oriented Architecture, Enterprise Data Warehousing, Cloud Computing, and Web Services (JSON/XML).	
Health Market Science, Inc.	2007 to 2010
Implement changes in the business processes to match product demand with supply. Drive development roadmaps, priorities and schedule of product releases in conjunction with business units. Manage the day to day operations of Project Management Office, Enterprise Architecture & Engineering, Software Development, Infrastructure, Security, Compliance, and Support. Established the company's Product/Project/Portfolio Management Office and the Enterprise Architecture Centers of Excellence.	

- Established the company's information security advisory committee and corporate Risk Mitigation Process.
- Repositioned the core products from Data Sales and Software Sales to SaaS and BPO

PNC Financial Services, Inc.

2000 to 2007

Business line CIO for PNC Wealth Management (formerly known as PNC Advisors), PNC Healthcare, and Treasury Receivables. Serve on executive oversight committees to provide leadership and align technology with business to maximize IT value. Responsibilities included strategic planning, developing operational roadmaps, managing system architecture, enterprise implementation, and providing business to technology transparency, and day-to-day operations including compliance and governance. Worked with ten distinct business silos to leverage common resources and set team strategy for implementation.

- Direct supervision of 160 professionals across two corporate verticals and five offices across three US cities. Span of control over 200 IT professionals.
- Delivered the PNC eHealthcare Platform applying LAMP technology to alleviate bandwidth, and storage constraints.

Additional Experience

Director Of Information Technology

Blattner Brunner, Inc.
Pittsburgh, PA

Sr. Consultant

Generation Technologies, Inc.
Pittsburgh, PA

Application Architect

Federated Investors, Inc.
Pittsburgh, PA

Project Manager / Technical Lead

Frontier Systems, Inc.
Pittsburgh, PA

Education

Bachelor of Science General Science,
Pennsylvania State University, University Park, PA

Table 4-17: Professional References Anthony Chough

Professional References: Anthony Chough	
Name	Anthony Chough
Title / Role	Project Manager
Reference 1	
Reference Name:	Michael Nelson, Founder, Polaris Digital Partners
Reference Phone:	202-255-8778
Reference Email:	mdn0123@gmail.com
Reference 2	
Reference Name:	Partha Bommireddy
Reference Phone:	(609) 375-2489
Reference Email:	partha.bommireddy@adroitent.com

Table 4-18: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR08	The Contractor must designate a Project Manager to represent and oversee the day-to-day activities of the project. This individual shall serve as the Department's primary point of contact for matters relating to the project and serve as a liaison for certification, collaborating with other contractors, and stakeholders.	HHS Tech has submitted Anthony Chough as Project Manager for the DDI phase of this project. He will be the Department's primary point of contact and serve as the liaison for this project with contractors, stakeholders and DPHHS.
KR09	The Contractor's Project Manager must meet the following qualifications including: a. A minimum of seven (7) years' project management experience managing projects of similar size and scope, preferably in Medicaid or the healthcare industry. This	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's proposed Project Manager, Anthony Chough, has over 20 years of experience in the Information Technology field. He has delivered multiple, successful, state-based Health and Human Services implementations

Req. ID	Req. Language	Response
	experience must include relevant experience within the last three (3) years from the release date of the RFP. b. Project Management experience should include each phase of the system development life cycle. c. Project management certification through the Project Management Institute (PMI) is preferred.	with complex requirements on the tightest timelines. Mr. Chough has a Bachelor's Degree in Science.
KR20	The Contractor's Project Manager shall be required to perform work at the State's primary project location (e.g., city, state), unless approved by the Department to work remotely.	HHS Tech's Project Manager's main worksite will be at the State's primary project location. Any work done remotely will be approved in advance with the Department.
KR30	The Contractor shall provide key personnel that at a minimum includes a Project Manager, Contract Manager and a Technical Manager for the Operations, Maintenance and Configuration phase of the project. Key personnel shall not hold more than one key role unless otherwise approved by the Department. The Contractor must identify other key personnel for the Operations, Maintenance and Configuration phase of the project. The Department will review and approve all key personnel.	HHS Tech will provide key personnel including the Project Manager, Contract Manager and a Technical Manager for the Operations, Maintenance and Configuration phase of the project. HHS Tech will receive prior approval from DPHHS in the event that a key personnel team member needs to fill multiple roles.

4.2.3.7 Contract Manager (Operations Phase) Michael Helmeke

The Contract Manager for the Operations Phase is a Key Personnel role that is the Department's primary point of contact for all matters concerning the project

Contract. HHS's Contract Manager, Michael Helmeke, will be responsible for project Contract performance, have the authority to make decisions that are binding to the Contract, be responsible for timely completion of the project, and be responsible for meeting all contractual obligations.

Mr. Helmeke has over 30 years of experience in Information Technology field. He is an experienced Contract Manager who brings together technical, project management, and strategy to deliver positive project outcomes. Mr. Helmeke has a Bachelor's Degree in Computer Science.

Table 4-19: Resume: Contract Manager – Michael Helmeke

Resume: Michael Helmeke	
Name	Michael Helmeke
Title / Role	Contract Manager
Professional Experience	
HHS Technology Group	2017 to Present
Executive responsible for overseeing contract management and account management. Mr. Helmeke is responsible for the company's performance and compliance with contracted responsibilities on a large Medicaid enrollment and eligibility state project. In this role, he oversees a team of 13 employees providing services to the prime vendor, a large systems integrator. He regularly and directly works contract and compliance personnel with the customer to perform contract review, management, changes and all contract legal matters. Mr. Helmeke works closely with customer management and executives to ensure key responsibilities are met or exceeded. Mr. Helmeke also supports select business development activities, driving the development of mutually agreeable scope and supporting contracts for proposed projects, including Statement(s) of Work, Master Agreements, Amendments, Flow-Down Agreements, BAAs, and other flow-down and related contract agreements.	
EngagePoint, Inc.	2014 to 2017
Oversaw EngagePoint's Contract Management for two of the company's largest clients including direct responsibility for contract performance and adherence and contract management.	
Mr. Helmeke frequently worked with company legal and business management in the development and negotiation of key contract artifacts supporting complex projects, including SOWs, work-breakdown plans, and professional services and licensing agreements.	

Emdeon Business Services	2004-2005
As head of the Contracts group, he directly led the sales and complex contracting solutions (systems and BPO) for some of the largest Blue Cross and Blue Shield companies in the country. Mr. Helmeke worked closely with Emdeon Corporate Legal staff in all contract matters, establishing a streamlined review and approval process after demonstrating successful contract management and oversight to new and existing clients post-acquisition. Managed the executive level sales activities, contracting and legal, partner programs, marketing and HIPAA compliance. Mr. Helmeke led scope development and high-level design effort to implement the large system HIPAA-compliant EDI Gateway system for WebMD/Emdeon. This system required a completely new HIPAA compliant front-end gateway, transaction management and reporting system integrated with disparate legacy backend systems to manage the nation's largest Claim / Authorization clearing house. He developed the initial scope of work and project plan, and continued to oversee the project in the executive role to ensure successful project completion.	
Dakota Imaging, Inc.	2002 to 2004
Established a Contracts and Legal department and led the contract aspects of large sales processes for one of the leaders in the Medicare and private claims capture and processing area. Mr. Helmeke managed contracting and legal, partner programs, HIPAA compliance, business partner programs and due-diligence legal activities.	

Dakota Imaging, Inc.	1988 to 1998
Led large services practice in business strategy assessments, business process re-engineering, and new technology and legacy system integration and solution design for large US and International clients. Often performed as Lead Consultant, Design Architect and Project Manager on many successful BPR and modernization projects, including claims processing, worker's compensation, state tax and other cross-industry applications.	
Additional Experience	
Partner and Co-Founder, 2005 - 2014	M&O Acquisitions, LLC., Baltimore Maryland (a real-estate company)
Federal Systems Programmer, 1985 - 1988	IBM Corporation, Gaithersburg, MD
Education	
Bachelor of Science Computer Science, University of Maryland, College Park, MD	

Table 4-20: Professional References - Michael Helmeke

Professional References: Michael Helmeke	
Name	Michael Helmeke
Title / Role	Contract Manager
Reference 1	
Reference Name:	Sandeep Goel
Reference Phone:	(307) 203-7778
Reference Email:	Sandeep.Goel@LightTreeFinancial.com
Reference 2	
Reference Name:	John Johnson
Reference Phone:	(410) 963-0460
Reference Email:	jhjohnso@us.ibm.com

Table 4-21: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR14	The Contractor must designate a Contract Manager to be the single point of contact for matters concerning the Contractor's performance under the Contract. This person shall have the authority to make decisions that are binding to the Contract, shall be responsible for timely completion of the project, and shall be responsible for meeting all contractual obligations.	HHS Tech proposes that Michael Helmeke serve as the HHS Tech Team Contract Manager for the Operations Phase. He will be the Department's primary point of contact for all matters concerning Contract performance, have the authority to make decisions that are binding to the Contract, be responsible for timely completion of the project, and be responsible for meeting all contractual obligations.
KR15	The Contractor's Contract Manager must have a minimum of five (5) years' contract management experience managing related services with similar budgets, preferably in Medicaid or the healthcare industry and for a project similar in size and scope to this project.	All HHS Tech staff proposed will meet or exceed the State's staff requirements for each role. HHS Tech's Contract Manager, Michael Helmeke, has over 30 years of IT industry and contract management experience.

4.2.3.8 Technical Manager (Operations Phase) - Leonid Marushevskiy

Mr. Marushevskiy will be HHS's Tech's Technical Manager for the Operations Phase of the project.

Mr. Maurshevskiy has over 14 years of experience in Information Technology software development and implementation. He has led development and integration teams for multiple projects that required complex integrations with legacy systems across multiple organizations. Additionally, he is an expert in Agile/Scrum methodology. Mr. Marushevskiy has a Bachelor's Degree in Computer Science, a Master's Degree in Management Information Systems, and a Master's Degree in International Business.

Table 4-22: Resume: Technical Manager - Leonid Marushevskyi

Resume:	
Name	Leonid Marushevskyi
Title / Role	Technical Manager
Professional Experience	
HHS Technology Group	2017 to Present
Serves as HHS Tech's technical application development and integration leader for multiple complex Health and Human Services implementations such as Child Welfare, Integrated Eligibility and Enrollment for Medicaid and other programs. Leading multiple backend development and integration teams, Mr. Marushevskyi is responsible for the technical planning, architecture, design, integration and implementation for these projects. Some specific highlights include: - Responsible for setting design and developing backend platform to support functional modules - Responsible for developing product roadmaps, backlogs, and measurable success criteria, and writing user stories - Led teams of 6-10 people to assist in backend platform development	
EngagePoint, Inc.	October 2012 to May 2017
Served in multiple roles including technical architect, application development lead, technical lead, lead developer and Scrum Master in multiple complex Health and Human Services implementations. Some specific highlights include: - Successfully served as technical leader of a team of 10 developers to develop prototype application for Child Welfare Agile Pool selection - Successfully served as technical leader together of a team of 15 developers to develop prototype application Child Welfare Agile Development Pre-Qualified Pool selection - Responsible for web application development for Integrated Enrollment and Eligibility Solution. Developed web application using Java, designed and developed complex back-end for web application based on open-source technologies like Spring Batch, Hibernate, Drools, including the development and consumption of RESTfull APIs as well as relational databases (DB2). - Responsible for implementing test-driven deployment using Jenkins and several levels of automated tests like unit, integration and acceptance	

PrivatBank	2011 to 2013
Designed and led development of Antifraud solution for biggest Ukrainian bank Privatbank. Key highlights include: • Web application development using Java (a.), writing of complex back-end for Antifraud web application based on open-source technologies like Spring, Hibernate, MongoDB, developing and consumption of RESTfull APIs as well as non-relational databases document oriented database MongoDB • Web application development using Java, writing of complex back-end for Internet banking web application based on open-source technologies like Spring, Hibernate, Redis, developing and consumption of RESTfull APIs as well as relation (Sybase) and non-relational databases (key-value storage Redis)	
Lugansk Customs House	2003 to 2011
• Responsible for the design, development and testing of complex reporting web application for departments of Luhansk Customs House using technologies Java EE, Java SE, Oracle, PL/SQL • Responsible for development and performance tuning of statistical reports from the Oracle database using SQL and PL/SQL	
Education	
Bachelor's Degree in Computer Science, Academy of Customs Services, Kiev, Ukraine Master's Degree in Management Information Systems, Academy of Customs Services, Kiev, Ukraine Master's Degree in International Business, Ukrainian State University of Finance and International Trade	

Table 4-23: Professional References - Leonid Marushevskyi

Professional References: Leonid Marushevskyi	
Name	Leonid Marushevskyi
Title / Role	Technical Manager
Reference 1	
Reference Name:	Rajit Garg
Reference Phone:	410-852-2679
Reference Email:	garg.rajit@gmail.com
Reference 2	
Reference Name:	Kyle Martin
Reference Phone:	(540) 529-2505
Reference Email:	khmartin@vt.edu

Table 4-24: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR30	The Contractor shall provide key personnel that at a minimum includes a Project Manager, Contract Manager and a Technical Manager for the Operations, Maintenance and Configuration phase of the project. Key personnel shall not hold more than one key role unless otherwise approved by the Department. The Contractor must identify other key personnel for the Operations, Maintenance and Configuration phase of the project. The Department will review and approve all key personnel.	HHS Tech will provide key personnel including the Project Manager, Contract Manager and a Technical Manager for the Operations, Maintenance and Configuration phase of the project. HHS Tech will receive prior approval from DPHHS in the event that a key personnel team member needs to fill multiple roles.

4.2.3.9 Business Operations Manager (Option B Provider Services) - Teha Hatfield

Table 4-25: Resume: Operations Manager – Teha Hatfield

Resume: Teha Hatfield	
Name	Teha Hatfield
Title / Role	Business Operations Manager
Professional Experience	
Maximus	September 2016 to April 2017
As Operations Manager, WY Customer Care Contact Center for the Wyoming Department of Health Medicaid and CHIP Eligibility, performed the following: · Oversaw all customer service functions and staff on a daily basis · Ensured compliance with all contractual operational requirements · Provided technical assistance to staff regarding programs, policies and procedures · Ensured adequate staffing levels and staff training to meet contractual requirements · Developed goals and objectives and monitor achievement · Worked with QA/QC and Training Managers to develop and implement quality control, quality assurance, and corrective actions plans · Conducted case audits and review reports to identify areas of improvement · Managed Inventory · Worked directly with all staff, managing day to day operations and mentoring staff to ensure adherence to quality and timeliness Service Level Agreements. · Duties included monitoring and/or performing function listed as Supervisor, WY Customer Care Contact Center as duties require to support success of contractual operational requirements	
Maximus	August 2016 to September 2016
As Supervisor, WY Customer Care Contact Center – Wyoming Department of Health Medicaid and CHIP Eligibility performed the following: · Maintain awareness of Client (WY Department of Health) Statement of Work and expectations · Enhance customer satisfaction and maintain high level of service delivery. Responsible for problem resolution for issues. · Manage additional responsibilities and respond to situations as they arise. Manage changes and transitions.	

- Review and update processes and procedures.
- Responsible for daily supervision which includes coaching, developing and educating staff.
- Design, implement and monitor on-the-job training processes and policies. Ensure support and control related activities are in place. Ensure corrections to the system are researched, resolved and corrections made to the system as needed'
- Monitor quality and quality goals within assigned areas of responsibility. Monitor Statement of Work role and responsibilities to insure success and customer satisfaction
- Assist in monitoring and project workload, staffing and equipment needs. Recruiting and replacement of FTE
- Design, implement and monitor on-the-job training processes and policies.
- Disseminate information and data to team members for the effective performance of their duties
- Continuously improve the team in the team practices (i.e. purpose, process, communication, involvement, commitment, and trust).
- Continuously improve the team in the team skills (i.e. personal and group effectiveness, and business and technical skills).
- Inventory Management and monitoring of performance against key indicators establish internally by the clients
- Communicate and interact effectively and professionally with co-workers, management, customers, etc.
- Comply with HIPAA, Diversity Principles, Corporate Integrity, Compliance Program policies and other Applicable corporate and departmental and Client policies.
- Maintain complete confidentiality of company and client related business.
- Maintain effective communication with management regarding development within areas of assigned responsibilities and perform special projects as required or requested.
- Participate in and ensure Long-term tactical planning (department plan, staffing, budgeting, term, process, Health Care Reform etc.).
- Plan, coordinate, collaborate and implement process re-engineering.
- Respond to customer complaints, concerns, and operational issues. I take measures to correct situation or ensure appropriate steps are taken and completed by delegation.
- Ensure all Client and company Performance Guarantees, Service Level Agreements, First Call Resolution and are being met.

Blue Cross Blue Shield of Montana

October 2011 – July 2015

As Manager/Supervisor, Call Center, Service Operation – Claims and National Programs, performed the following:

- Maintained awareness of customer perceptions of our products and service. Enhance customer satisfaction and maintain high level of service delivery. Responsible for problem resolution for issues.
- Managed additional responsibilities and respond to situations as they arose.
- Managed changes and transitions. Reviewed and updated processes and procedures.
- Maintained responsibility for daily supervision which includes coaching, developing and educating staff.
- Designed, implemented and monitored on-the-job training processes and policies.
- Ensured support and control related activities are in place.
- Ensured corrections to the system are researched, resolved and corrections made to the system as needed
- Monitored quality and quality goals within assigned areas of responsibility.
- Monitored open call inventory.
- Managed and responded to audits
- Assisted in monitoring and project workload, staffing and equipment needs.
- Recruited and staffed replacement Full Time Employees
- Disseminated information and data to team members for the effective performance of their duties
- Continuously improved the team in the team practices (i.e. purpose, process, communication, involvement, commitment, and trust).
- Continuously improved the team in the team skills (i.e. personal and group effectiveness, and business and technical skills).
- Communicated and interacted effectively and professionally with co-workers, management, customers, etc.
- Ensured compliance with HIPAA, Diversity Principles, Corporate Integrity, Compliance Program policies and other Applicable corporate and departmental policies.
- Managed inventory and monitored performance against key indicators established by internal clients.
- Maintained complete confidentiality of company related business.
- Maintained effective communication with management regarding development within areas of assigned responsibilities and perform special projects as required or requested.
- Participated in and ensured long-term tactical planning (department plan, staffing, budgeting, term, process, Health Care Reform etc.).
- Developed solution issues or complex problems in collaboration with other key stakeholders.
- Oversaw the development and implementation of innovative new ideas and methodologies to improve service level agreements and operational efficiencies.

- Responded to customer complaints, concerns, and operational issues. Took measures to correct situations or supervised remedial actions.
- Ensured compliance with Performance Guarantees, Service Level Agreements, First Call (SQM) Resolution and Member Touch Point measurements

Blue Cross Blue Shield of Montana

December 2006 to October 2011

As Manager/Supervisor, Claims Adjudication, Service Operation – Claims and National Programs, performed the following:

- Led, coached and motivated core team and cross-functional teams
- Coached team for success on team and individual goals and team success factors.
- Facilitated staff development - Support the evolvement of performance management/Success Factors
- Disseminated information and data to team members for the effective performance of their duties - Continuously improve the team in the team practices (i.e. purpose, process, communication, involvement, commitment, and trust).
- Continuously improved the team in the team skills (i.e. personal and group effectiveness, and business and technical skills).
- Recruited and replaced Full Time Employees
- Monitored inventory of claims reprocess and Quality reviews

Reports/Staffing:

- Claims Quality Review Team: Audit of transactions and phone calls to ensure quality and timeliness. Results of audit are reported and feedback given to the resource being audited. Findings may include Desk Level Procedures needing updated and communicated to all impacted areas.
- Claims Support Specialist: Support other areas within our company, by responding to a number of processing questions. Research, Analysis, Desk Level Procedure updates, one-on-one training and documentation clarification. The writing of Service Requests when system enhancements are needed. Support fellow team members with inventory levels by performing production transactions.
- Claims Adjudicator Teams: Team members perform Claims processing transactions such as:
 - a) System edits that are designed for special handling of unique processing needs that also ensure quality processing of the claims.
 - b) Claims adjustments to readjudicate claims depending on need or problem identified.
 - c) Accident Letters and system edits related to processing of claims related to accidents.

Blue Cross Blue Shield of Montana

May 2005 to December 2006

As Web Solution Customer Service Specialist, performed the following:

- Administered and maintained data content for Member and Provider Service Web solutions and applications, including FAQ's.
- Identified Web application(s) problems and coordinate the resolution with the Help Desk or the e-Business Department.
- Performed acceptance testing for related Web application enhancements and updates.
- Ensured current business process structure is maintained with the development of new Web-based delivery tools.
- Analyzed, researched, and identified business problems and recommend appropriate solutions.
- Designed and implemented system business processes and enhancements. Recommended and coordinated enhancements to the Web site.
- Ensured that the on-line customers receive superior service by acting as a liaison between the customer and the systems personnel.
- Acted as a subject matter resource for website systems and user personnel.
- Defined user requirements and communicated to the appropriate staff.
- Provided appropriate measurements and reporting. Communicate progress, exceptions, and results.

Professional Training

MES Leadership Series

DDI Leadership Modules

Extensive professional development with focus in Project Management, Leadership and Management Development, Lean Six Sigma, Programming/Coding: Plan Adjudication Specification Method

Table 4-26: Professional References - Teha Hatfield

Professional References: Teha Hatfield	
Name	Teha Hatfield
Title / Role	Business Operations Manager
Reference 1	
Reference Name:	Robin McDaid
Reference Phone:	(406) 461-0491
Reference Email:	robinmcdaid@gmail.com
Reference 2	



Reference Name:	Brad Combs
Reference Phone:	(970) 691-7344
Reference Email:	Brad.combs@live.com

Table 4-27: Key Personnel and Resources Requirements: Attachment F – Requirements Matrix

Req. ID	Req. Language	Response
KR30	The Contractor shall provide key personnel that at a minimum includes a Project Manager, Contract Manager and a Technical Manager for the Operations, Maintenance and Configuration phase of the project. Key personnel shall not hold more than one key role unless otherwise approved by the Department. The Contractor must identify other key personnel for the Operations, Maintenance and Configuration phase of the project. The Department will review and approve all key personnel.	HHS Tech will provide key personnel including the Project Manager, Contract Manager and a Business Operations Manager for the Operations, Maintenance and Configuration phase of the project. HHS Tech will receive prior approval from DPHHS in the event that a key personnel team member needs to fill multiple roles.

Req. ID	Req. Language	Response
STF04	The Contractor shall designate a Business Operations Manager to lead the Contractor's Business Operations for Provider Screening, Enrollment and Monitoring, including: -Document Management and Workflow Performance -Provider Data Management -Provider Support Services (training and site visits) -Provider Enrollment Call Center -Financial Enrollment Process coordination with State Auditor's Office (SAO) This position is considered to be a key specific management position.	HHS Tech will ensure an appropriate Business Operations Manager is in place throughout the contract term as part of our core team. The Manager will bring specific experience and knowledge in provider enrollment, management, and support services.

4.2.4 Offeror Financial Stability

Offerors shall demonstrate their financial stability to supply, install, and/or support the services specified by: (1) providing annual financial statements, preferably audited (for publicly traded companies), audited financial statements (for privately held companies), or unaudited financial statements and tax returns (for privately held companies for which audited statements are not available), for the three consecutive years immediately preceding the issuance of this RFP. If an Offeror does not have three (3) years of such documentation, it shall submit the documentation that it does have going back no more than three Offeror fiscal years; and (2) providing copies of any quarterly financial

statements that have been prepared since the end of the period reported by its most recent annual report. If financial statements aren't publicly available, Offeror must meet the requirements of Sections 2.3.1 and 2.3.2 to have the information kept confidential.

4.2.4.1 Formation, Products, People and IT Services

HHS Technology Group, LLC (HHS Tech, the Operating Company, or the Company) was formed in June 2017 for the purpose of assisting citizens achieve their full social and economic potential through the use of IT systems and services. HHS Tech initially acquired the software products developed by EngagePoint, Inc., an industry leader for the past 10 years in the design and delivery of modular IT systems, and has built onto that platform to enhance their overall set of software solutions. Although recently formed, the Company acquired significant software and IT Service contracts during its formation, which are currently part of day-to-day operations and IT service delivery functions.

The key individuals supporting these contracts are long-standing industry experts who lead HHS Tech's delivery of top-tier software and IT services. These contracts and supporting teams (approximately 100 personnel) are core to the vision, mission and values of the Company and are executed from four main offices in Sacramento, CA, Jefferson City, MO, Fort Lauderdale, FL and Kiev, Ukraine. The Company also maintains satellite offices in New York, NY and Helena, MT.

4.2.4.2 Corporate Ownership

HHS Technology Group is a wholly owned subsidiary of HHS Technology Group Holdings, LLC (the Holding Company), an investment management company focused on long-term value creation for its organizations. The Holding Company made a multimillion-dollar investment in the creation and launch of the Company in June 2017 and is actively involved in day-to-day operational management. The Holding Company also provides HHS Tech with access to growth capital and operating funds as needed.

Ultimately that growth capital is and has been provided by Brevet Capital Management, an institutional investor dedicated to the overall value creation of its investments. Brevet invested more than \$50 million to support software development at EngagePoint prior to the HHS Tech acquisition. As a hedge fund with over \$1 billion in invested capital, Brevet is able to provide the financial backing and stability needed for a growing organization in the Health and Human Services industry.

The management team of HHS Tech, in addition to the Company's owners, all have extensive experience in navigating the demands of a project with this scope of services and duration.



4.2.4.3 Financial Statements

Included below are the Financial Statements for HHS Tech from inception through September 30, 2017.



HHS TECHNOLOGY GROUP, LLC

Consolidated Financial Statements

As of and for the period ended June 30, 2017

*Management Reporting Date:
July 19, 2017*

Figure 1: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017

HHS Technology Group, LLC
Consolidated Balance Sheet
As of June 30 2017

	2017 JUNE
ASSETS	
Current Assets	
Cash	\$ 557,898
Committed Capital	4,255,000
Accounts Receivable, net	721,510
Prepaid and other current assets	237,176
Total Current Assets	<u>5,771,584</u>
Property and equipment, net	276,075
Software Development Costs, net	1,249,610
Intangibles, net	156,436
Goodwill	99,847
Total Assets	<u>\$ 7,553,551</u>
LIABILITIES AND SHAREHOLDER EQUITY	
Current Liabilities	
Accounts Payable	\$ 184,966
Accrued expenses and other current liabilities	440,242
Deferred Revenue	500,600
Total current liabilities	<u>1,125,808</u>
Other long-term liabilities	<u>-</u>
Total Liabilities	1,125,808
Members' Equity	
Contributed Capital	68,502,642
Committed Capital	(61,502,642)
Retained Earnings	(572,257)
Total members' equity	<u>6,427,743</u>
Total Liabilities and Members' Equity	<u>\$ 7,553,551</u>

The accompanying notes are an integral part of these consolidated financial statements.

Figure 2: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017

HHS Technology Group, LLC
Consolidated Income Statement
For the month ended June 30, 2017

	2017 JUNE
Revenue	\$ 724,487
Cost of Revenue	
IT Services, software management and development	222,906
Sales and marketing	52,642
General and administrative	282,547
Depreciation	93,489
Income From Operations	\$ 72,903
Other income (expense)	
Amortization of intangible assets	(41,700)
Indirect payroll expense	(627,044)
Other income (expense)	23,584
Total other income (expense)	(645,160)
Income (loss) before income taxes	\$ (572,257)
Income tax expense	\$ -
Net Income (Loss)	\$ (572,257)

The accompanying notes are an integral part of these consolidated financial statements.

Figure 3: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017

HHS Technology Group, LLC
Footnotes to Consolidated Financial Statements
For the month ended June 30, 2017

The significant accounting policies of our Company, which are summarized below, are consistent with U.S. GAAP and reflect practices appropriate to the business in which we operate.

Use of estimates

The preparation of financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting periods presented. Estimates include, but are not limited to, the establishment of reserves for accounts receivable; the useful lives for property, equipment, and intangible assets. In addition, estimates and assumptions associated with the determination of the fair value of financial instruments and evaluation of long-lived assets for impairment requires considerable judgment. Actual results could differ from those estimates and such differences could be material.

Basis of presentation

The Consolidated Financial Statements include the accounts of the Company and all related subsidiaries; HHS Services Group, LLC located in Fort Lauderdale, Florida USA and Health Technology Group Europe; a limited liability company located in Kiev, Ukraine; and HHS Technology Group, Inc. located in New York, NY. All significant inter-company balances and transactions have been eliminated. Unless indicated otherwise, the information in the Notes to Consolidated Financial Statements relates to our continuing operations.

Management Review

Management has reviewed the accompanying consolidated balance sheet HHS Technology Group, LLC and its subsidiaries (collectively the "Company") as of June 30, 2017, and the related consolidated income statement for the last month (the first month of operations) ended June 30, 2017.

Management conducted its review in accordance with the standards of the Public Company Accounting Oversight Board (United States). Those standards require that we plan and perform the review to obtain reasonable assurance about whether the financial statements are free of material misstatement. Our review included consideration of internal control over financial reporting as a basis for designing review procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control over financial reporting. A review includes examining evidence supporting the amounts in the financial statements, assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our review provides a reasonable basis for our opinion.

In Management's opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of HHS Technology Group, LLC and its subsidiaries as of June 30, 2017, and the results of operations for the period ended June 30, 2017, in conformity with accounting principles generally accepted in the United States of America. Also, in our opinion, the financial schedule, when considered in relation to the basic consolidated financial statements taken as a whole, present fairly, in all material respects, the information set forth therein.

Figure 4: HHS Technology Group Consolidated Financial Statements - Period Ended June 30, 2017



HHS TECHNOLOGY GROUP, LLC

Consolidated Financial Statements

As of and for the three month period ended September 30, 2017

*Management Reporting Date:
October 20, 2017*

Figure 5: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017

HHS Technology Group, LLC
Consolidated Balance Sheet
As of September 30, 2017

	<u>2017</u> <u>September</u>
ASSETS	
Current Assets	
Cash	\$ 182,000
Accounts Receivable, net	2,206,000
Prepaid and other current assets	<u>301,000</u>
Total Current Assets	2,689,000
Property and equipment, net	197,000
Software Development Costs, net	217,000
Investment in HHS Tech Group Ukraine	150,000
Intangibles, net	<u>3,020,000</u>
Total Assets	<u>\$ 6,273,000</u>
LIABILITIES AND SHAREHOLDER EQUITY	
Current Liabilities	
Accounts Payable	\$ 514,000
Accrued expenses and other current liabilities	219,000
Deferred Revenue	<u>298,000</u>
Total current liabilities	1,031,000
Long-term liabilities	<u>-</u>
Total Liabilities	1,031,000
Members' Equity	
Contributed Capital	73,168,000
Committed Capital	(65,600,000)
Retained Earnings Prior	<u>(2,326,000)</u>
Total members' equity	5,242,000
Total liabilities and members' equity	<u>\$ 6,273,000</u>

The accompanying notes are an integral part of these consolidated financial statements.

Management Reporting Date
October 20, 2017

Figure 6: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017

HHS Technology Group, LLC
Consolidated Income Statement
For the three months ended September 30, 2017

	Q3 - 2017
Revenue	\$ 1,915,000
Cost of Revenue	
Professional Services	1,065,000
Software development & design	886,000
Sales and marketing	202,000
General and administrative	969,000
Total Cost of Revenue	3,122,000
Operating Income (Loss)	\$ (1,207,000)
Other income (Expense)	
Depreciation	(105,000)
Amortization of intangible assets	(6,000)
Business formation costs	(454,000)
Total other income (expense)	(564,561)
Income before income taxes	\$ (1,770,663)
Income tax expense	-
Net income	\$ (1,770,663)

The accompanying notes are an integral part of these consolidated financial statements.

Management Reporting Date
October 20, 2017

Figure 7: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017

HHS Technology Group, LLC
Footnotes to Consolidated Financial Statements
For the three months ended September 30, 2017 (Q3 - 2017)

The significant accounting policies of our Company, which are summarized below, are consistent with U.S. GAAP and reflect practices appropriate to the business in which we operate.

Use of estimates

The preparation of financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting periods presented. Estimates include, but are not limited to, the establishment of reserves for accounts receivable; the useful lives for property, equipment, and intangible assets. In addition, estimates and assumptions associated with the determination of the fair value of financial instruments and evaluation of long-lived assets for impairment requires considerable judgment. Actual results could differ from those estimates and such differences could be material.

Basis of presentation

The Consolidated Financial Statements include the accounts of the Company and all related subsidiaries; HHS Services Group, LLC located in Fort Lauderdale, Florida USA and Health Technology Group Europe; a limited liability company located in Kiev, Ukraine; and HHS Technology Group, Inc. located in New York, NY. All significant inter-company balances and transactions have been eliminated. Unless indicated otherwise, the information in the Notes to Consolidated Financial Statements relates to our continuing operations.

Management Review

Management has reviewed the accompanying consolidated balance sheet HHS Technology Group, LLC and its subsidiaries (collectively the "Company") as of September 30, 2017, and the related consolidated income statement for the three months ended September 30, 2017 (Q3 - 2107).

Management conducted its review in accordance with the standards of the Public Company Accounting Oversight Board (United States). Those standards require that we plan and perform the review to obtain reasonable assurance about whether the financial statements are free of material misstatement. Our review included consideration of internal controls over financial reporting as a basis for designing review procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control over financial reporting. A review includes examining evidence supporting the amounts in the financial statements, assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our review provides a reasonable basis for our opinion.

In Management's opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of HHS Technology Group, LLC and its subsidiaries as of September 30, 2017, and the results of operations for the three month period ended September 30, 2017, in conformity with accounting principles generally accepted in the United States of America. Also, in our opinion, the financial schedule, when considered in relation to the basic consolidated financial statements taken as a whole, present fairly, in all material respects, the information set forth therein.

Figure 8: HHS Technology Group Consolidated Financial Statements - Period Ended October 20, 2017



4.2.5 Oral Presentation / Product Demonstration / Interview

Offerors selected to participate in product demonstrations/interviews will be notified by the State in advance. For planning purposes, the State will submit an agenda and specific guidance as deemed appropriate to promote productive and efficient product demonstrations. The Offeror is expected to demonstrate and answer questions on the products and/or services outlined in the Offeror's proposal to meet the requirements of this RFP. It is required that the Contractor have a demonstration environment that is comprised of the proposed solution components that are currently operating in a production environment. Product Demonstrations/Interviews will be scheduled for all offerors who received a 70% or higher score on the technical proposal.

Offerors will be required to bring certain key personnel to the product demonstrations/interviews in Helena, Montana. At a minimum, the following key staff are expected to be present. Offerors are welcome to bring additional staff at their discretion.

- 1. Project Manager*
- 2. Contract Manager*
- 3. Testing Lead*
- 4. Integration Lead*
- 5. Certification Lead*

HHS Tech understands the requirement and will comply.

4.2.6 Equal Pay for Montana Women

Executive Order No. 12-2016 promoting equal pay for Montana women directs the Department of Administration to include incentives in the RFP process for contractors who engage in best practices to promote wage transparency. These best practices include the following:

- (a) posting salary ranges in employment listings;*
- (b) certifying that the contractor will not ask about wage history in employee interviews; and*
- (c) certifying that the contractor will not retaliate or discriminate against employees who discuss or disclose their wages in the workplace.*

☐ *No, I do not agree.*

Company Name (Clearly Printed): _____

Authorized Signature: _____

Date: _____



Statement of Compliance with Equal Pay for Montana Women. Offeror indicating it will comply with Executive Order No. 12-2016 will receive 5% of the total points available. Offerors who do not comply will not receive the available points. Offerors are required to sign and upload a PDF copy of this certification with their proposal to certify compliance.

☒ Yes, I agree and will comply with the best practices to promote wage transparency outlined in Executive Order No. 12-2016.

Company Name (Clearly Printed): HHS Technology Group, LLC

Authorized Signature: _____

Date: _____

HHS Tech understands the requirement and will comply. The Certificate for Equal Pay for Montana Women is included with our submission on Montana Acquisition & Contracting System (eMACS) and a copy is inserted below (Figure 9).

**DEPARTMENT OF ADMINISTRATION
STATE FINANCIAL SERVICES DIVISION
STATE PROCUREMENT BUREAU**

sfsd.mt.gov



STEVE BULLOCK
GOVERNOR

STATE OF MONTANA

MITCHELL BUILDING, ROOM 165
PO BOX 200135

(406) 444-2575
(406) 444-2529 FAX
TTY Users-Dial 711

HELENA, MONTANA 59620-0135

Certificate of Compliance

Equal Pay for Montana Women. Executive Order No. 12-2016 promoting equal pay for Montana women directs the Department of Administration to include incentives in the RFP process for contractors who engage in best practices to promote wage transparency. These best practices include the following:

- (a) posting salary ranges in employment listings;
- (b) certifying that the contractor will not ask about wage history in employee interviews; and
- (c) certifying that the contractor will not retaliate or discriminate against employees who discuss or disclose their wages in the workplace.

Statement of Compliance with Equal Pay for Montana Women. Offeror indicating it will comply with Executive Order No. 12-2016 will receive 5% of the total points available. Offerors who do not comply will not receive the available points. Offerors are required to sign and upload a PDF copy of this certification with their proposal to certify compliance.

☒ Yes, I agree and will comply with the best practices to promote wage transparency outlined in Executive Order No. 12-2016.

Company Name (Clearly Printed): HHS Technology Group, LLC

Authorized Signature: *Bridgette W. H.*

Date: 10/31/2017

☐ No, I do not agree.

Company Name (Clearly Printed): _____

Authorized Signature: _____

Date: _____

"AN EQUAL OPPORTUNITY EMPLOYER"

Figure 9: Certificate for Equal Pay for Montana Women