

March 25, 2004

Ms. Jo Ann Cowger
Issuing Officer
Iowa Department of Human Services
1st Floor, Hoover State Office Building
1305 East Walnut Street
Des Moines, Iowa 50319-0114

Re: Addendum to Technical Proposal, RFP #: MED-04-037

Dear Ms. Cowger:

In accordance with RFP Section 2.9 and 2.18 of the above-referenced RFP, FOX Systems, Inc. (FOX) has been asked to revise information presented in its Technical Proposal that was submitted on March 1, 2004 to address new requirements presented by Amendment 1 (posted on DHS website on March 18, 2004).

In response to DHS requirements from RFP Amendment 1, we have enhanced our project team with a full-time Medicaid Program Policy Expert leading a Medicaid Policy and Subject Matter Experts (SMEs) team to address your concerns about the availability of State SMEs to support the contract. Furthermore, we have also strengthened our technical team by adding highly experienced technical specialists with Data Warehouse expertise and Pharmacy Point-of-Sale expertise as a means to mitigate the risks involved in bringing in these new system elements. Finally, in addition to strengthening the SME and technical teams, we have also significantly enhanced our project management infrastructure.

We hope that the information presented by this addendum on the following pages provides sufficient level of detail to address the questions raised by the DHS Proposal Evaluation Committee. As requested, text additions have been presented in "bold" type and text deletions have been presented as "strike-through" text.

Please do not hesitate to contact us if you have any further questions about our proposal and the services we are offering. We look forward to continuing our very successful relationship with the State of Iowa.

Sincerely,

Desh Ahuja
Executive Vice President



TABLE OF CONTENTS

TABLE OF CONTENTS	I
EXECUTIVE SUMMARY (RFP 4.2.3)	1
AMENDMENT 1 CROSS-REFERENCE	9
ORGANIZATION INFORMATION AND PAST PERFORMANCE (RFP 4.2.5)	15
ASSIGNED PROJECT STAFF (RFP 4.2.5.4).....	15
<i>Approach to Project Organization</i>	16
<i>Proposed FOX Project Team</i>	17
<i>Project Organization Chart</i>	20
<i>Skill Sets Required</i>	22
<i>Resumes</i>	31
<i>Job Descriptions</i>	59
<i>Value of FOX Project Organization</i>	61
<i>On-Site Presence of Proposed Staff (RFP 4.2.5.4.1)</i>	62
<i>Maximum/Minimum Number On-Site Staff by Phase/Month (RFP 4.2.5.4.2)</i>	67
SERVICE REQUIREMENTS (RFP 4.2.6)	69
ACTIVITIES APPLICABLE TO ALL PHASES (RFP 3.2.1 AND 5.4.2).....	69
<i>Overview</i>	70
<i>Key Activity: Review Project Deliverables (RFP 3.2.1.15)</i>	91
PHASE 1: APRIL 2004 – JUNE 2004 (RFP 3.2.2 AND 5.4.2).....	93
<i>Overview</i>	93
<i>Key Activity: Monitor Development of Data Warehouse (DW) (RFP 3.2.2.4)</i>	102
<i>Key Activity: Perform Code Analysis of MMIS (RFP 3.2.2.6)</i>	105
PHASE 2: JULY 2004 – DECEMBER 2004 (RFP 3.2.3 AND 5.4.2).....	109
<i>Overview</i>	109
<i>Key Activity: Assess Design and Installation of Infrastructure (RFP 3.2.3.2)</i>	118
<i>Key Activity: Assess Application Software (RFP 3.2.3.3)</i>	119
<i>Key Activity: Determine if Rules are Synchronized with Policy (RFP 3.2.3.5)</i>	121
PHASE 3: JANUARY 2005 – JUNE 2005 (RFP 3.2.4 AND 5.4.2).....	123
<i>Overview</i>	123
<i>Key Activity: Implement WPM Design and Reporting (RFP 3.2.4.1)</i>	132
PHASE 4: JULY 2005 – MARCH 2006 (RFP 3.2.5 AND 5.4.2)	135
<i>Overview</i>	135
<i>Key Activity: Optimize WPM Design and Reporting (RFP 3.2.5.1)</i>	144



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

This Page Intentionally Left Blank



EXECUTIVE SUMMARY (RFP 4.2.3)

The bidder shall submit an executive summary that briefly reviews the strengths of the bidder and key features of its proposed approach to meet the requirements of this RFP.

[Redacted]

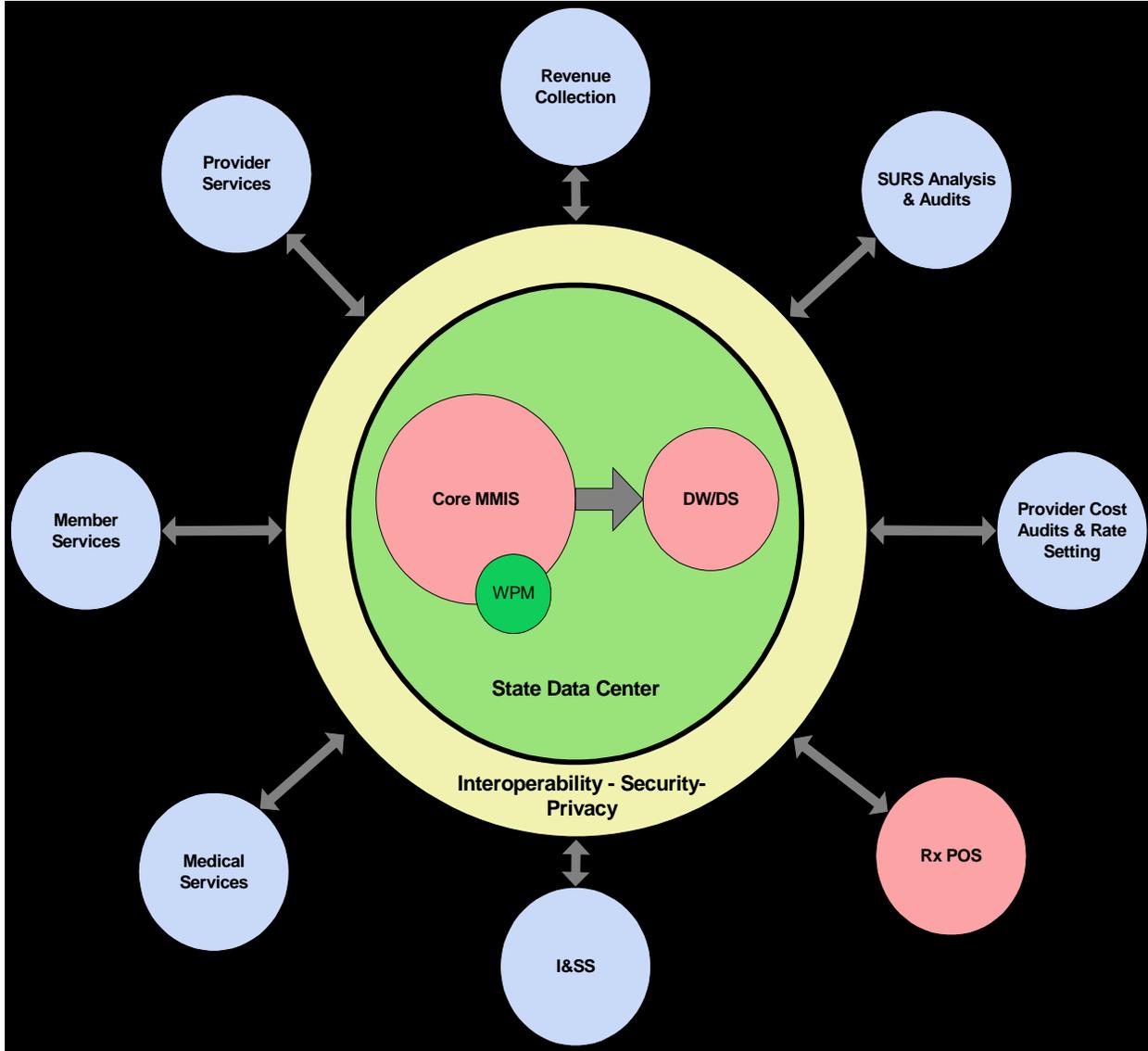
[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]





*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

[Redacted text block]



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

[Redacted text block]

[Large redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

[Redacted content]





AMENDMENT 1 CROSS-REFERENCE

In the following table, FOX has provided a cross-reference that maps Amendment 1 requirements to the pages of this addendum where DHS can find the corresponding FOX response.

Amended Sections (Amended language is in Bold)	Proposal Location																		
<p>Bidders who submitted a bid proposal may amend their technical and/or cost proposals in response to this amendment. Amended proposals shall be submitted as follows:</p> <ul style="list-style-type: none"> • Amendments to proposal are due March 25, 2004 by 3:00 PM Central Time. • Electronic mail and faxed Bid Proposal amendments will not be accepted. • Submit substitute pages to the original Bid Proposal showing additions (in bold) and deletions (in strike through). Bidders are not required to re-submit the entire Bid Proposal. • The bidder must sign the substituted pages. 	<p>No text additions / deletions necessary</p>																		
<p>Oral presentations will be held March 31, 2004 in Des Moines at a location to be announced. Presentations will be scheduled for a maximum of two hours. (This amends the first sentence of the answer to question #31 posted February 23, 2004).</p>	<p>No text additions / deletions necessary</p>																		
<p>2.4 Procurement Timetable</p> <p>The following dates are set forth for informational and planning purposes; however, the Department reserves the right to change the dates.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 70%;">Notice of Intent to Issue RFP</td> <td style="text-align: right;">2/02/2004</td> </tr> <tr> <td>Issue RFP</td> <td style="text-align: right;">2/09/2004</td> </tr> <tr> <td>Letters of Intent and Questions Due</td> <td style="text-align: right;">2/16/2004</td> </tr> <tr> <td>Response to Questions Issued</td> <td style="text-align: right;">2/20/2004</td> </tr> <tr> <td>Closing Date for Receipt of Bid Proposals and Amendment to Bid Proposals</td> <td style="text-align: right;">3/25/2004</td> </tr> <tr> <td>Oral Presentations</td> <td style="text-align: right;">3/31/2004</td> </tr> <tr> <td>Announce Apparent Successful Bidder</td> <td style="text-align: right;">4/05/2004</td> </tr> <tr> <td>Completion of Contract Negotiations and Execution of the Contract</td> <td style="text-align: right;">4/12/2004</td> </tr> <tr> <td>Begin Contract</td> <td style="text-align: right;">4/15/2004</td> </tr> </table>	Notice of Intent to Issue RFP	2/02/2004	Issue RFP	2/09/2004	Letters of Intent and Questions Due	2/16/2004	Response to Questions Issued	2/20/2004	Closing Date for Receipt of Bid Proposals and Amendment to Bid Proposals	3/25/2004	Oral Presentations	3/31/2004	Announce Apparent Successful Bidder	4/05/2004	Completion of Contract Negotiations and Execution of the Contract	4/12/2004	Begin Contract	4/15/2004	<p>No text additions / deletions necessary</p>
Notice of Intent to Issue RFP	2/02/2004																		
Issue RFP	2/09/2004																		
Letters of Intent and Questions Due	2/16/2004																		
Response to Questions Issued	2/20/2004																		
Closing Date for Receipt of Bid Proposals and Amendment to Bid Proposals	3/25/2004																		
Oral Presentations	3/31/2004																		
Announce Apparent Successful Bidder	4/05/2004																		
Completion of Contract Negotiations and Execution of the Contract	4/12/2004																		
Begin Contract	4/15/2004																		



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

Amended Sections (Amended language is in Bold)	Proposal Location
<p>2.20 Oral Presentations</p> <p>Bidder finalists may be requested to make an oral presentation of the Bid Proposal. Bidders are required to bring the Program and/or Project Manager(s) and the Medicaid Program policy expert. They may bring other key personnel as desired. The presentation will occur at a State office building in Des Moines, Iowa. The determination of participants, location, order and schedule for the presentations is at the sole discretion of the Department and will be provided during the Evaluations process. The presentation may include slides, graphics and other media selected by the bidder to illustrate the bidder's Bid Proposal. The presentation shall not materially change the information contained in the Bid Proposal as amended.</p>	<p>No text additions / deletions necessary</p>
<p>2.22 Award Notice and Acceptance Period</p> <p>Notice of intent to award the contract will be sent by mail to all bidders submitting a timely bid proposal. The notice of intent to award is subject to execution of a written contract and, as a result, the notice does not constitute the formation of a contract between the Department and the apparent successful bidder. Awarding the contract to the apparent successful bidder is final for purposes of Iowa Code Chapter 17A. Bidders may request review of the award decision by filing a written appeal to the District Court. Any action taken by a bidder to request review of the award decision will not stay negotiation of the contract with the apparent successful bidder. Negotiation and execution of the contract shall be completed no later than April 12, 2004 subject to CMS approval. If the apparent successful bidder fails to negotiate and execute a contract by April 12, 2004, the Department may revoke the award and award the contract to the next highest ranked bidder.</p> <p>The Department further reserves the right to cancel the award at any time prior to the execution of a written contract.</p>	<p>No text additions / deletions necessary</p>
<p>3.2 Scope of Work</p> <p>3.2.1 Activities Applicable to All Phases</p> <p>The activities and skill sets needed throughout this project include extensive general Medicaid Program policy expertise and strong project management skills to manage a multi-faceted, interconnected project. Bidders are encouraged to partner with others to assemble the various skill sets needed throughout the term of the Contract. The Contractor will be expected to be on-site unless, at the sole discretion of the Department, other arrangements are made. The successful bidder must be able to keep the big picture in focus as well as handle the multitude of detail from multiple contractors comprising the Iowa Medicaid Enterprise (IME). It is important that each phase be completed on time. The requirements of this RFP require the successful bidder to bring all necessary skill sets and required expertise to this project. State Subject Matter Experts (SME) will not be assigned to this project except for oversight and approval and limited consulting purposes. The Department will not be</p>	





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

Amended Sections (Amended language is in Bold)	Proposal Location
<p>involved in performing the tasks described below except as explicitly mentioned. It should be understood that the successful bidder is the State's primary resource for the activities listed in the RFP. This means the successful bidder must bring all SME resources for successful completion of all design, development and implementation of the IME.</p> <p>➤ Explain your role in developing and coordinating the individual components and contractors into the cohesive entity known as the IME.</p> <p>Skill sets include extensive Medicaid Program experience and strong project management skills to review, assemble, and monitor the multiple work plans from each IME contractor and DHS, along with the independent verification and validation (IV&V) facet into a Master Work Plan (MWP). IV&V of the proposed compilation of services and systems is also a major requirement of this contract. Interested bidders will need to refer to the IME RFP released in December on the Department's website (www.dhs.state.ia.us) or request a softcopy of the RFP from the Department, to understand the full scope of management responsibilities of the Implementation and Support Services contractor. Bidders with previous IV&V experience in a Medicaid Enterprise such as that contemplated in Iowa will be favored.</p> <p>➤ Tell us how you use the Medicaid Program policy expertise in the IV&V process.</p> <p>The Implementation and Support Services contractor will oversee the transfer of the existing Medicaid Management Information System (MMIS) from a legacy system of the current Medicaid Fiscal Agent Contractor (ACS) to Iowa's State Data Center (SDC). A data warehouse will also be built on the SDC hardware. Subject Matter Experts (SME) in the management of Information Technology (IT) projects with the proven ability to oversee and to complete projects on time are crucial to the success of the Iowa Medicaid Enterprise project.</p> <p>The current MMIS has embedded in the system the Iowa Medicaid business rules. Activities of this contract require the Contractor to bring SMEs that will read the code of the current MMIS and document the business rules. The skills required to review the rules and document any discrepancies will require the talents of SMEs with extensive experience in Medicaid Program policy and the ability to facilitate the type of communications with DHS Medicaid policy staff that will successfully communicate any differences in the current MMIS with current Iowa Medicaid policy exist. The contractor will identify and document any differences before review with policy staff.</p> <p>➤ Explain how you will integrate your Medicaid policy expertise with your analysis of the MMIS business rules.</p>	





Amended Sections (Amended language is in Bold)	Proposal Location
<p>The development of a workflow process management system to include all the components of the new IME with an emphasis on quality and efficiency will require the skills of SMEs that are familiar with healthcare insurance operations, Medicaid Program policies and successful workflow design. It will be critical that an optimal workflow process is designed to successfully incorporate all IME contractors and the Department's Medicaid staff into a cohesive, efficient, seamless operation. To do this the contractor will draw upon their Medicaid Program experience and their healthcare operations experience to develop a system within the workflow design to easily monitor activities of the IME contractors as they relate to the workflow so problems can be detected and resolved.</p> <ul style="list-style-type: none"> ➤ Tell us how you will integrate your Medicaid expertise and your healthcare insurance operations expertise with the workflow process management system. ➤ Explain your approach to the requirements in the RFP as the lead in development of the workflow process management system. <p>As part of the successful melding of multiple contractors and DHS Medicaid staff to form the IME, the physical location of IME will be developed and implemented. The successful bidder will also participate in the determination of layout of the office and placement of personnel, equipment and systems, etc. and overseeing the activities associated with move and set up of the new IME. The Contractor must have the understanding of Medicaid policies and best practices and skills to optimally structure the physical location of resources in accordance with the workflow process management developed to optimize the IME.</p> <ul style="list-style-type: none"> ➤ Explain how you will use the Medicaid expertise you bring in the development of the plan to layout the physical placement of the components of the IME. <p>The concept of this project brings to the table different aspects of Medicaid expertise. It requires Medicaid Program policy and Medicaid best practices experience as well as MMIS system experience.</p> <ul style="list-style-type: none"> ➤ Identify the resources and explain the application of the Medicaid Program policy experience you bring to this project. ➤ Provide the resume of the Medicaid Program policy expert including dates, company name and project(s) of prior experience as a Medicaid Program policy expert and resumes of any new staff submitted as an amendment to your original bid proposal. ➤ If there are any other changes in staffing from that identified in the original bid proposal, please explain. 	



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

Amended Sections (Amended language is in Bold)	Proposal Location
<p>➤ Please update personnel references as necessary.</p> <p>The bidder shall delineate the skill sets needed to accomplish the following key activities and demonstrate the bidder's competency in each skill set. The successful bidder will provide the necessary software tools to meet the needs and scope of this project. (See section 4.2.5.4.4)</p> <p>The key activities identified in the section below (3.2.1.1 through 3.2.1.16) span the entire contract period. The skill sets associated with each key activity must be available for the entire term of the Contract.</p>	
<p>4.2.5.4</p> <p>Describe the executive management and technical staff assigned to this project. Include the number of staff, their roles on this project, their expertise and experience in providing the services described in the RFP, and their tenure with your organization. Include resumes for all individuals assigned to the project; Project manager must have a CPM or PMP certification in project management. The RFP requires a Medicaid Program policy expert with experience in federal and state Medicaid policy (not necessarily Iowa policy) and Medicaid best practices be onsite through the term of the contract.</p>	
<p>4.5.13 Bid Bond</p> <p>The bidder shall submit a bid bond or certified check in favor of or made payable to the State of Iowa in the amount of \$5000.00 which shall guarantee the availability of the services offered for a minimum of thirty (30) days after the date set for completion of contract negotiations and execution of the contract. The bond of the apparently successful bidder shall be forfeited if that bidder fails to negotiate and deliver an executed contract by the date specified in the procurement timetable (see 2.4 Procurement Timetable) set in the procurement time table for completion of contract negotiations and execution of contract. The bid bond or certified check shall be returned to bidders following execution of the contract.</p>	<p>No text additions / deletions necessary</p>





*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

This Page Intentionally Left Blank

ORGANIZATION INFORMATION AND PAST PERFORMANCE (RFP 4.2.5)

ASSIGNED PROJECT STAFF (RFP 4.2.5.4)

Describe the executive management and technical staff assigned to this project. Include the number of staff, their roles on this project, their expertise and experience in providing the services described in the RFP, and their tenure with your organization. Include resumes for all individuals assigned to the project; Project manager must have a CPM or PMP certification in project management.

In this section, we describe the roles and responsibilities of each executive, management, and technical staff member assigned to this project. We include brief descriptions of each team member's background, skills, and experience providing the services required of this solicitation, their tenure with FOX, and the resume of each. Furthermore, we have included a Project Organization Chart.

FOX has developed a superior project organization based on our understanding of the requirements for the I&SS contractor as well as our understanding of the needs of the project and the capabilities and capacity of DHS to support the project scope from internal resources. The success of the IME implementation requires a Project Team across all organizations, including DHS, ITE, FOX, and the component contractors, that can adopt a shared vision of success and can effectively collaborate to achieve our common objective. The role of the I&SS contractor is crucial to developing and promoting the shared vision of the IME.

FOX's day-to-day involvement with DHS in the development of the IME procurement over the last 20 months has given us a first hand understanding of the project requirements, the roles and responsibilities of the organizations involved in the implementation, and a working relationship with DHS staff this is based on the fundamental principle of collaboration—working together to achieve a common goal.

FOX has carried forward a number of key individuals in the development of the staffing plan for the I&SS contract. These individuals—Bill Larkin, Bruce Weydemeyer, Jim Elco, and Nancy Shump—have demonstrated skills, knowledge, and work styles that have gained the trust and appreciation of their DHS co-workers on the procurement project. In addition to these staff, FOX has assembled an especially talented team with the skill sets required to perform all of the key work activities in the scope of work for the I&SS contractor.

In this section, we describe our approach to developing the Project Organization, present the Proposed Project Team, illustrate the team in the Project Organization Chart, and describe the skill sets that we believe are needed for each phase of the project.

In addition to presenting the FOX Project Manager, we also present the resumes for the FOX Team Leaders and Key Personnel for this project. We also have identified all other FOX staff who will be

assigned to the project and who have skill sets that are essential to the I&SS project. We have included their resumes as well as job descriptions of the roles and responsibilities for these and future team members who may be assigned to this project during the term of the project. Each resume that is provided includes a description of their expertise and experience in providing the services described in the RFP and their tenure with FOX.

This section concludes with a Value Proposition that establishes why the FOX team approach, with the highly skilled and experienced staff we have assembled, demonstrates FOX's unique ability to assist DHS in the management of the implementation of the IME.

Approach to Project Organization

In the development of the Project Organization, key FOX staff reviewed the unique requirements for the I&SS contractor. FOX's experience with DHS enabled us to analyze the requirements for all IME startup activities and put these in context with the available skill sets and capacity of the current DHS Medicaid staff to better understand the staffing requirements and skill sets needed to manage the IME implementation.

FOX recognizes the special capabilities that the I&SS contractor will need:

- Ability to coordinate and manage much of the interaction and communications between DHS and the component contractors
- Ability to promote the vision of the IME and inspire collaboration and dampen competitive instincts
- Ability to manage a large scale project with a significant number of events that must be orchestrated to ensure that the project is implemented in a timely manner with a manageable level of risk
- Experience and expertise in the large implementation of a complex business enterprise that integrates business activities, information systems and information technology across multiple organizations
- Superior subject matter expertise in Medicaid, MMIS and the Iowa Medicaid Program, and the skills needed to augment and make the best use of scarce DHS resources
- Proven skills in the review of implementation activities, deliverables, and verification and validation of requirements using a regimen of efficient methodologies that not only assess but also seek to improve the overall project processes

In our design of the project organization, we followed the requirements of the RFP and have built a project organization that is headed by a very capable and experienced Project Manager, **Ms. Pearlene Ryan**~~Mr. Edward Foster~~, who will manage the FOX I&SS Project and direct the Project Management Office responsibilities. **Ms. Ryan is a very strong Project Manager with a strong**

IT background and industry-wide healthcare experience that includes Medicaid, Medicare, Managed Care, and commercial healthcare insurance. To assist **Pearlene Edward** in the duties of managing the Project Management Office, we have assigned Mr. Jim Elco as the Deputy Project Manager. Jim's detailed understanding of the procurement and IME components make him a strong complement to **Pearlene's Edward's** management skills and strong understanding of all aspects of Medicaid IT and administrative operations.

In addition, we have developed a project structure that is composed of **four (4)**~~three~~ teams:

- **Medicaid Policy and SME Team** – Medicaid Program policy and subject matter experts, who provide expert insight on Medicaid Program policy to DHS and the I&SS project team.
- **Technical Support Team** – This team has an unmatched set of technical, MMIS, and Medicaid skill sets, including direct experience with the current Iowa MMIS.
- **Business Activities and Monitoring Team** – This team includes Medicaid Business Process experts supporting workflow design, enterprise configuration, and implementation tasks and assessment.
- **Independent Verification and Validation (IV&V) Compliance Team** – This team includes experienced compliance review and audit experts with IV&V experience using FOX methodologies on recent MMIS and contractor implementations. They will be responsible for the large number of technical review activities that occur across all phases of the project.

Our project organization also carries over our executive oversight with the continuing Client Executive and Technical Advisory Group members from the **IME Systems & Professional Services** Procurement Support Services Project. This approach and FOX's commitment to this oversight has been most successful to date, and we believe that executive level involvement is a key element in the overall success of the Iowa Medicaid Enterprise.

Proposed FOX Project Team

FOX has selected the most highly qualified **and dedicated** team of individuals to lead this project. Not only does each of the individuals have outstanding credentials, they also have a proven record of working together in similar Medicaid implementation projects. FOX understands that the success of this implementation is dependent on the ability and skills of the I&SS Project Team, and no other organization can field a leadership team more capable of supporting DHS in IME implementation.



Bill Larkin, FOX Client Executive

Bill will continue as the Client Executive to DHS on this project. As Vice President of Consulting for FOX, Bill brings the full commitment of the company to the project. He is available to work directly with senior DHS executives and has the authority to commit resources to the project. In addition, Bill brings years of Medicaid experience and Iowa specific knowledge to the project.

Pearlene Ryan, FOX Project Manager

Pearlene Ryan is eminently qualified to serve as the Project Manager and play a key role in the development of the Iowa Medicaid Enterprise. Her experience with Medicaid/MMIS, healthcare information technology and operations, Call Centers, Web Portals, and large-scale system implementations provide her with the best composite skill set for the I&SS Project Manager. She has managed complex IT and Medicaid managed care system implementations for over ten years in her 25-year IT career. She combines several key elements: strong IT project management skills, excellent technology management qualifications, deep knowledge of Medicaid and healthcare, and the ability to help facilitate the cultural and organizational change management required amongst all IME project stakeholders. Her credentials as a certified Project Management Professional and her knowledge of many of the technology enhancements and facility development activities that are key I&SS contractor responsibilities also enhance her abilities to *hit the ground running* in Iowa.

~~Ed is eminently qualified to serve as the Project Manager and play a key role in the development of the Iowa Medicaid Enterprise. His experience with Medicaid/MMIS and healthcare operations, his credentials as a certified Project Management Professional, and his knowledge of many of the technology enhancements and facility development activities that are key I&SS contractor responsibilities make him an outstanding Project Manager. His recent experience assisting the Virginia Medicaid agency with its MMIS development effort enables him to *hit the ground running* in Iowa.~~

Jim Elco, FOX Deputy Project Manager

Jim Elco continues to be an important member of the FOX IME team. As the Deputy Project Manager, Jim will be responsible for the setting up and running the Project Management Office. This office will be responsible for maintaining the Master Work Plan, issue tracking, and reporting. Jim's mission will be to ensure that all elements of the IME Implementation project are monitored. Jim has demonstrated his project management skills in the IME Procurement Support Services project.

Bruce Weydemeyer, Medicaid Policy and SME Team Lead

Bruce Weydemeyer, a former State Medicaid Director for New Mexico, continues to be an important member of the FOX IME team. As the Medicaid Policy and SME Team Lead, Bruce will provide expert advice and analysis regarding "best practices" and Medicaid program trends to both DHS and the FOX I&SS Project Team. Bruce's experience on the IME Procurement Support Services project will also be helpful in ensuring that all policy-related elements of the IME Implementation project are monitored.



Frank Matina, Technical Support Team Lead

Frank Matina is currently the FOX Project Manager of the TCMIS IV&V Project in Tennessee. He has many years of system development and technical experience, including development experience for a decision support system for a state Medicaid program. He is knowledgeable of many MMIS system architectures, including Consultec-designed systems. He has been closely involved in system and user acceptance testing in Tennessee. Frank has an excellent working relationship with Bill Larkin, who **also** serves as Client Executive on the Tennessee project ~~that Bill Larkin is managing~~.

Mary Jane Tierumniks, Business Activities and Monitoring Team Lead

Mary Jane Teirumniks is a Registered Nurse and M.P.H. and is very knowledgeable in Medicaid medical policy and coverage, in part from her Medicaid SURS and utilization review management experience with the Indiana and Georgia Medicaid programs. Mary Jane has managed and provided oversight to a number of managed care system implementations. In Tennessee, she developed the business process model for the TCMIS. She also was a contributor to the CMS Medicaid HIPAA Compliance Concept Model that defined the business processes of a typical Medicaid enterprise. Mary Jane has worked with Frank on a number of HIPAA assignments, and also worked with John Cole and Bill Larkin on the TCMIS procurement development project.

John Cole, Independent Verification and Validation Compliance Team Lead

John is a Certified Public Accountant and has many years of large-scale healthcare **system and operations** experience. He is currently responsible for data conversion management on the FOX TCMIS IV&V project. John has been involved in a number of system implementations, has excellent knowledge of systems and file structures and brings an auditing perspective to the FOX IV&V activities. John has worked with both Frank and Bill on the TCMIS IV&V project. **He is an excellent analyst to assist in the development and revision of design requirements for large Data Warehouse systems.**

Nancy Shump, Key Analyst on Phase 1-4 Teams

Nancy continues to play an important role in the IME project and will be responsible for much of the IV&V responsibility, including requirements traceability. Nancy has managed many aspects of numerous MMIS/contractor implementations in several states, and her skill sets are an invaluable resource. Nancy may relocate to Des Moines to be available as an important compliance resource to the IME implementation project.

Technical Advisory Group (TAG)

FOX continues the practice of involving a set of high level FOX resources who will help oversee and guide the Project Team and be available to the client.

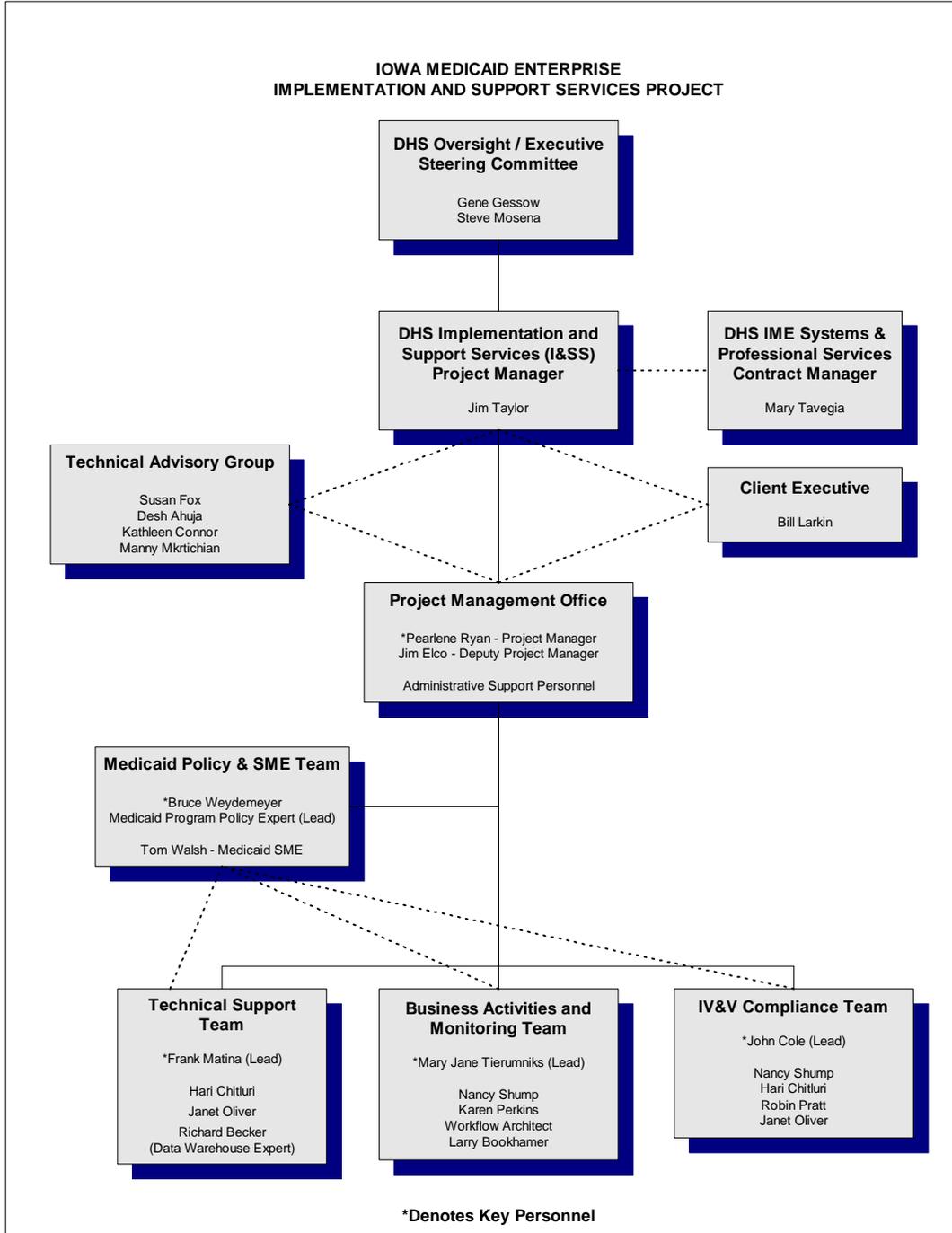
- **Dr. Susan Fox** - Founder and Chair of the Board of Directors of FOX, will monitor and assist on the project. Her current work with CMS on the Medicaid Information Technology Architecture (MITA) makes the evolution of the IME most relevant.
- **Mr. Desh Ahuja** – Executive Vice President of FOX, will monitor and assist on the project. His previous work with FOX Implementation Support / IV&V projects in Georgia and Florida will be a valuable technical and conceptual resource for the IME I&SS project.
- ~~**Mr. Bruce Weydemeyer** – who was the Project Manager on the FOX Iowa Procurement Support Project, continues on the project as a key member of the TAG.~~
- **Ms. Kathleen Connor** - Senior Consultant, works with Susan Fox on the CMS MITA and serves on a number of industry standard setting organizations as Co-Chair including WEDi, X12N, and HL7. She has over 14 years of Medicaid operational experience with the state of Washington.
- **Mr. Manny Mkrtichian** - FOX's Chief Technology Officer, will also serve in an advisory role to assist the project team and DHS on technology issues as they arise during the course of the project.

Project Organization Chart

The chart on the following page depicts the FOX I&SS Project Organization. Our organizational approach is designed to maintain staff continuity to support the Project Management Office and the Team Leads while allowing for reallocation of other project resources as particular skill sets are needed across key activities and project phases. This approach enables FOX to make the most effective use of skill sets needed across all RFP Key Activities. The project organization is shown on the next page.

Some positions are full-time throughout the project, some are full-time for a Phase, and some staff will provide back-up **staff** during certain labor-intensive activities such as review of large documents, producing the logical workflow diagrams, and orchestrating the occupancy of the new building.

Figure 2: Project Organization Chart



Skill Sets Required

Many different skill sets are needed to support roles and responsibilities of the I&SS contractor. In preparing our proposal, FOX did an exhaustive analysis of the requirements of each key activity and determined the skill sets needed for each phase. We have defined a skill set to be:

Knowledge, experience, and demonstrated capabilities of an individual that contribute to an enterprise activity.

Using this definition, we developed a set of almost 100 skill sets that we believe are needed by the I&SS contractor to accomplish the key activities in the four phases of the contract. In developing our staffing and approach to the service requirements, we evaluated the skill sets of each individual to ensure that we were able to staff the project with individuals that meet all of the required skill sets needed to accomplish the key activities. In the table that follows, FOX presents the skill sets for each project team member. To assist in understanding each individual's relationship to FOX, we have also noted each person's tenure with FOX (in years).

Table 2: Project Skill Set Matrix

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrтчhian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Tenure with Fox (Years)	17	12	2	3	3	1	3	7	2	5	3	8	1	1	1	9	6	8	3
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				



SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data warehouses or decision support systems									X		X		X		X				
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

SKILL SETS	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Resumes

In this section we present the resumes of the key individuals proposed for the FOX I&SS Project Team. A review of each resume will establish the unique experience and expertise we have assembled for this project. Each resume demonstrates the qualities of the individual and how he or she meets key characteristics that we feel define our project organizational approach.

This section is organized as follows:

- Resumes for designated key personnel: **Pearlene Ryan**~~Edward Foster~~, **Bruce Weydemeyer**, Frank Matina, Mary Jane Teirumniks, and John Cole
- Resumes for other important team members: Bill Larkin, Jim Elco, Nancy Shump, **Tom Walsh, Hari Chitluri, Richard Becker**, Janet Oliver, Robin Pratt, Karen Perkins, and Larry Bookhamer
- Resumes for Technical Advisory Group members: Susan Fox, **Desh Ahuja**, Kathleen Connor, ~~Bruce Weydemeyer~~, and Manny Mkrtychian

***Note:** The following pages include resumes for project staff that were not previously submitted with the March 1, 2004 Technical Proposal. As discussed in the Transmittal Letter for this document, some previously existing FOX Project Team members have been replaced in order to better respond to the needs of DHS and the Iowa Medicaid Enterprise. The only FOX staff member that is no longer proposed for this project is Edward Foster. New FOX Project Team members are identified in “bold” type by the bullet points above.

PEARLENE M. RYAN
CERTIFIED PROFESSIONAL PROJECT MANAGER

OVERVIEW

Ms. Pearlene Ryan is a PMI-certified Project Manager with over 25 years of IT experience including complex system project management in many different industries such as healthcare, banking, financial services, and airlines. Her healthcare sector experience is her strongest, having worked in the public and private sectors on large system development projects including: Medicaid Management Information System (MMIS), Web portals, Call Centers, managed care information systems, and data warehouses. She also has a Masters in Business Administration (specializing in Technology Management) and is a certified member of the Professional Academy of Healthcare Management (PAHM), thereby bringing strong healthcare knowledge along with her technical project management skills. Finally, with her expert communication, facilitation and collaboration skills, Ms. Ryan also specializes in cultural change management associated with new system implementations and has consulted in business process reengineering, organizational design, policy and procedure development, and consensus building for such projects.

Ms. Ryan's healthcare project experience includes participation in the development of the new Georgia MMIS and managed care system implementation for healthcare payers and managed care health plans in over a dozen states and in the United Kingdom.

RELEVANT SKILLS AND QUALIFICATIONS

- Certified Professional Project Manager (PPM), Project Management Institute (PMI)
- MBA with a specialization in Technology Management
- Member of the Professional Academy of Healthcare Management (PAHM)
- Strong knowledge of MMIS and managed care systems
- Proven risk management and quality assurance skills
- Ability to facilitate corporate project and quality goals, and mentor team members at all levels within an organization.

EMPLOYMENT SUMMARY

ORGANIZATION	POSITION	DATES
FOX Systems, Inc.	Project Manager	2004
DataTek Consulting	Consultant Project Manager	2003
Bank One	Project Manager	July 2002 - October 2002
Bank of America	Project Manager	1999 - 2001
Analyst International Consulting	Contract Project Manager	November 1998 to June 1999

ORGANIZATION	POSITION	DATES
GTE Data Services	Project Manager	1992 - 1998
America West Airlines	Associate Consultant/Project Leader	1987 - 1991
CIBER	Consultant	1986 – 1987
Petrosar, Ltd.	Programmer/Analyst	1980 - 1986
Prestolite Wire and Cable	Data Center Operations Manager	1978 - 1979

PROJECT SUMMARIES

CONSULTANT WITH DATATEK CONSULTING – ASSIGNED TO AFFILIATED COMPUTER SERVICES (ACS) FOR THE STATE OF GEORGIA DEPARTMENT OF COMMUNITY HEALTH

- Managed Phase II Commercial Financial System development/implementation project, until project was canceled
- Co-Managed and developed 1099 reconciliation project, which involved installing in-bound and out-bound Call Centers and developing infrastructure, procedures, and metrics to support Medicaid accounts receivable (A/R) reconciliation.
- Procured and trained all resources for in-bound and out-bound Call Centers serving reconciliation.

TECHNOLOGY PROJECT MANAGER – BANK ONE

- Implemented Project Management Office
- Transition of in-house data operations, managing multiple projects within one program
- Responsibilities focused on recruiting, training, and facilities management

PROJECT MANAGER / CHANGE CONSULTANT – BANK OF AMERICA

- Managed projects from conception through completion and served as project/client liaison
- Initiated original project request
- Maintained project documentation, such as project charter, scope of work, project plan, issues, changes in scope of work
- Reported discrepancies in project documentation, test scripts, test results, quality measurements,
- Prepared “lessons learned” documentation, meeting minutes/agendas, and sign-off documentation
- Procured and deployed project resources
- Developed and executed project work plans
- Coordinated test plans with configuration management team, hardware technicians, and/ or vendors
- Facilitated project meetings
- Implemented major initiatives involving quality, technology, transition, and compliance:

- Developed Customer Satisfaction Performance Metrics
- Defined and developed business and process measures/metrics
- Influenced leaders and partners to adopt synchronized metrics with two other metric initiatives: “Project Dashboard” and “balanced scorecard” business metrics
- Developed collection method and web-base reporting.
- Met project goals, delivering on time with satisfactory results, including consistent customer metric reporting, and project became foundation for future metric reporting
- As Project Manager, received three Customer Leadership Awards for this project
- Involved in transitions projects, including: merging data centers, Voice Response Units (VRUs), Call Centers, help desks, and data security.
- Involved in compliance projects, including: Association Mandates, Pin Encryption, and Year 2000 (Y2K) hardware and software compliance.
- Involved in Technology projects: OLAP, BACARDI, VRU, Trajecta, Kaleidoscope, Knowledge Channel, Debt Protection, Event Management, and established (3) Y2K command centers.
- Supported the following departments during the course of the projects: Analysis Information Management, Retention, Emerging Technologies, Service Delivery, Platform Management, Associate Experience, Strategic Planning, Card Issuance, Credit Operations, ATM/Debit, Commercial Card, Consumer Card, Risk Operations, Merchant, Credit Risk, Government, Military, Marketing, and Relationship Management.
- Coordinated efforts with the following vendors: MasterCard and Visa Associations, Total Systems, and Trajecta.

PROJECT MANAGER / CONSULTANT – ANALYST INTERNATIONAL CONSULTING

- Assigned to Bank of America for technology transition projects, merging technologies and business processes for Nations Bank with Bank of America, including the merger of data centers, help desk, Call Centers, systems, and project offices
- Established Y2K procedures and 3 command centers.
- Established disaster recovery procedures and business continuity procedures.

PROJECT MANAGER / SYSTEMS ANALYST – GTE DATA SERVICES (NOW VERIZON HEALTHCARE)

As a Project Manager (1994 to 1998)

- Provided management and healthcare solutions to healthcare organizations and State Medicaid agencies
- Managed an international assignment in London, England involving the transition project of England's Health Care system, converting data master files to HBOC software and establishing metrics; \$12 million project delivered on time and under budget; Received recognition from corporate headquarters for this effort

- Managed major implementations and software release projects involving 20+ programmers and contractors in a matrix environment; Each project finished under budget and delivered on time.
- Involved in various projects from design through implementation. Gathered requirements, conducted JAD sessions, obtained sign-offs, presented technical overviews, resolved issues, tracked/resolved discrepancies
- Answered Requests for Proposals (RFPs) for the following State Medicaid agencies: Utah, Oklahoma, Florida, California, and Texas
- Managed billing, managed claims processing software requirements/conversions, and implemented cost containment programs for the following states: Michigan, Oklahoma, California, Florida, Missouri, Texas, and Arizona
- Managed software requirement projects for the following Medicaid claims processors: CIGNA, Arizona Physicians (APIPA), Cal-Optima, Kaiser Permanente, and Delta Dental
- Managed software conversions and implementations for hospitals, HMOs, and clinics at: BUPA, Blue Cross/Blue Shield Georgia, Blue Cross/Blue Shield Maryland, Kaiser Permanente, Delta Dental, CIGNA, Order of St. Francis, Arizona Physicians (APIPA), Foundation Health, Travelers, and HIP of New York
- First point of contact for customer software discrepancies
- Backed up Account Executive, when necessary
- Set up Disaster Recovery Procedures and worked with Disaster Recovery Committee
- As a TQM team member, developed and established quality metrics at Q/Care Division of GTE Data Services. Received recognition from corporate headquarters for this effort
- Provided on-site client support during requirement gathering, requests for proposals, software implementation, and software training

As a Systems/Analyst (1992 - 1994)

- Supported Q/Care Products: Capitation, Billing and Financial Systems
- Wrote requirements, designed, and programmed specifications
- Led projects, giving direction to 6+ technical personnel
- Maintained existing client code and resolved discrepancies
- Traveled to client sites for sales, installation support, and requirement gathering
- Provided supervisor backup when necessary

ASSOCIATE CONSULTANT / PROJECT LEADER (AIRLINE OPERATIONS TEAM) – AMERICA WEST AIRLINES

- Liaison for the Recruitment, Training, and Professional Development Departments (1 Senior Director, 10 managers, and approximately 200 instructors)
- Supported all personal and mainframe computing
- Set up Disaster Recovery Procedures
- Captured high-level business planning requirements via KnowledgeWare case tool
- Supervised 10+ programmers on five major projects

- Supported Flight Control, Field Stations, Training, Professional Development, Inflight Services, Operations Planning Customer Support Services, Customer Scheduling, Revenue Accounting, Market Planning, Pilot Recruitment, Pilot Training, Schedule Planning and CSR Recruitment/Training and Yield Management
- Developed Project Tracking and Emergency Extract (incident/discrepancy) Systems
- Deployed system development lifecycle methodology
- Deployed project methodology
- Deployed quality methodology

CONSULTANT / ANALYST – CIBER (CONSULTING IN ENGINEERING AND BUSINESS)

- Designed, implemented, and maintained Frequent Flyer, Revenue Accounting, Fare Revenue Sampling, and Cargo tracking systems
- Established data center
- Trained new personnel on Mapper and Executive programming languages

PROGRAMMER ANALYST, MANAGEMENT SCIENCE & BUSINESS – PETROSAR, LTD. (PETROCHEMICAL PLANT)

- Set up data center, including setting up Disaster Recovery Procedures.
- Supported Inspection Reliability, Project Engineering, Design Engineering, and Occupational Safety/Health Departments.
- Designed, implemented, and maintained applications used by supported departments.
- Backup analyst for the McCormick Dodge Human Resources modules.
- Prior position at Petrosar: Product Scheduler

DATA CENTER OPERATIONS MANAGER/SUPERVISOR – PRESTOLITE WIRE AND CABLE

- Direct management of 18 reporting staff members
- Budget management responsibilities
- Merged 5 data centers

PREVIOUS POSITIONS:

- Patient Accounting Data Operations Supervisor - Mercy Hospital Port Huron, Michigan 9 direct reports utilizing McAuto timeshare system
- Data Operations - Pontiac General Hospital supervisor
- Patient Accounting - Pontiac General Hospital supervisor, worked with State Medicaid and Blue Cross Blue Shield to improve claims processing/cash flow



EDUCATION

MBA, Technology Management, University of Phoenix, 2002

BS, Business Administration and Management (BSBAM), University of Phoenix, 1997

Project Management Professional (PMP) designated from Project Management Institute in May 2001, continuing certification requirement expires December 2007

Professional Academy Healthcare Management Certification (PAHM) – August 1998

TOOLS AND METHODOLOGIES

Microsoft Office, Word, Excel, MS Project, Visio, Flow, Lotus Notes, Power Point, ISO 9000, Six Sigma, Capability Maturity Model (CMM), Total Quality Management (TQM), Process Improvement, PMBOK, Joint Analysis Design (JAD), IEEE, Method I, Change Process Methodology (CPM), Change Management Enterprise Resource Planning (ERP), and Configuration Management.

HARDWARE/SOFTWARE EXPERIENCE

Mainframe: Unisys, IBM, VAX

Midrange: IBM, SUN, Unix

COBOL on several platforms: MVS, JCL, CICS, SQL

Casetools: KnowledgeWare, ADW/IEW

OS, DOS, OS1100, ISPF/TSO, and Mapper

Credit Card Processing software: Trajecta, Pega, Advanced Consumer Application Processing System (ACAPS), and Total Systems

Managed Care Software: Q/Care, HBOC, STAR, and McAuto Hospital systems software

Human Resource software: Cyborg Applicant Tracking/Human Resource Modules, McCormick Dodge Human Resource Modules, and Siltan Bookman Training Modules

Yield Management software: Sperry Revenue Enhancement Module

Airline systems: Northwest Airlines Frequent Flyer system

THOMAS J. WALSH

MEDICAID SUBJECT MATTER EXPERT (SME)

OVERVIEW

Dr. Thomas Walsh has 30 years experience in Health and Human Services Programs and Program Management. Dr. Walsh served at the executive level in Illinois State government for eleven years and was the Medicaid Administrator for the State from 1984 to 1986. He has held varied responsibilities in design, development and implementation of Medical Management Information Systems (MMIS) and Social Services systems. He is skilled in successfully incorporating public policy, such as Medicaid, state finance, child welfare and mental health policy, into information system designs. Mr. Walsh has proven success in analysis of business processes and process improvement studies and possesses strong knowledge and experience in Project Management; Re-engineering of Organizations and Processes; Logical Data Modeling; Requirements Analysis and JAD Session Facilitation; System Design; Management decision analyses; Data Analysis/Data Conversion; Statistical Analysis and Projection; Finance and Financial Management; Enhancement of Federal Reimbursement; Rate Setting and Claims and Encounter Processing.

Dr. Walsh's gained extensive Medicaid and MMIS experience from his work in the following positions and projects:

- Ongoing management consulting services including management systems requirements analysis, Implementation of Medicaid Eligibility policies in multiple systems, development of application programs and implementation of MMIS services, implementation of management controls and initiatives in administration, and assisting user communities to implement Medicaid related systems.
- Team Leader for a Subcontract to the Arizona Health Care Cost Containment System (AHCCCS) responsible for development and testing of the PMMIS information system. Responsibility centered on Medicaid Eligibility determination and maintenance, Provider registration and claims processing systems.
- Assisted HMOs in the development and testing if MMIS systems required to meet AHCCCS health plan requirements.
- Team Lead for Implementation and Contingency Planning, and Designer for transaction and code set development for the Arizona AHCCCS Program
- Project Manager for the HIPAA Privacy and Security assessment and implementation project for the States of Hawaii and Arizona
- System Designer and Team Lead for the design and implementation of SACWIS systems in Arizona, Nevada and Illinois. Responsibilities included incorporation of Medicaid eligibility determination and claiming into these systems.
- Contractor for Arizona AHCCCS System to prepare for and pass the HCFA System Performance review needed to maintain certification of Medicaid Management Information Systems (MMIS)

EMPLOYMENT SUMMARY

ORGANIZATION	POSITION	DATES
FOX Systems, Inc.	Associate Consultant	2003 - present
Walsh And Associates	President	1/1988 – 2003 5/1986 – 6/1987
Deloitte & Touche	Senior Consultant	6/1987 – 1/1988
State of Illinois	Medicaid Director	4/1984 – 5/1986
State of Illinois	Deputy Director, Child Welfare Services	6/1979 – 4/1984
State of Illinois	Deputy Director, Dept of Public Health	12/1976 – 6/1979

PROJECT EXPERIENCE

MMIS IMPLEMENTATION (SEPTEMBER 2003 – DECEMBER 2003)

Under subcontract to UNISYS to implement UniPAS, a MMIS system based on the QMACS managed care system. Dr. Walsh provided various services, including deputy implementation manager, documentation preparation, analysis of system functionality and trainer.

HIPAA TRANSACTIONS AND CODE SETS (JANUARY 2003 – AUGUST 2003)

Team Lead for Implementation and Contingency Planning, and Designer for transaction and code set development for the Arizona AHCCCS Program. The project implemented HIPAA Transactions and code sets for the Arizona Medicaid program. The contingency planning model was referenced by CMS as a model for contingency plan design.

HIPAA COMPLIANCE (MAY 2002 – JANUARY 2003)

Project Manager for the HIPAA Privacy and Security assessment and implementation project for the States of Hawaii and Arizona. The project covered evaluation of privacy and security compliance with the HIPAA program.

QUALITY ASSURANCE FOR CHILD WELFARE SYSTEMS (JUNE 2000 – MAY 2002)

As a subcontractor to MAXIMUS, Inc., served as Team Leader for business process quality assurance services in the development of a SACWIS child welfare system for the State of Illinois. The project developed a web based, object oriented SACWIS system using an n-tier architecture. Also assisted the Department in discussions of Title XIX and Title IV-E policy requirements and reimbursement strategies.



REORGANIZATION OF THE NEVADA MEDICAID PROGRAM (SEPTEMBER 2000 – DECEMBER 2000)

As a subcontractor to MAXIMUS Inc., provided analysis and recommendations for re-organization of the Nevada Medicaid Program. The analysis referenced Medicaid policy requirements and ensured compliance with applicable federal and State requirements.

EVALUATION OF SURS SYSTEMS (JUNE 2000 – OCTOBER 2000)

As a consultant for FourThought Group, conducted an evaluation of the SURS system and processes in the State of Missouri.

TRANSFER AND ADAPTATION OF CHILD WELFARE SYSTEMS (1989 – 2000)

Participated as a System Designer, and Team Lead for testing in the transfer of the CHILDS System to the State of Nevada. The system encompassed Child Protective Services, Case Management, Juvenile Justice, Mental Health Treatment, Federal Reimbursement and Financial Management. Dr Walsh was responsible for design of the Financial Management and federal eligibility determination components. The design was based on federal and State Medicaid policies, and maximized reimbursement based on the federal and State program requirements.

EVALUATION OF PUBLIC HEALTH DATA SYSTEMS (1999)

As a consultant for FOX Systems, Inc, participated in an evaluation of five automated Public Health systems for the State of Louisiana. Dr Walsh participated in interpreting State requirements and evaluating candidate systems for goodness of fit. The analysis included evaluation of support for identified processes and an evaluation of the compatibility of the data model of each candidate system with the functionality to be supported.

PROCUREMENT OF A CONTRACTOR FOR THE ARIZONA WORKS PROGRAM (1997 – 1998)

Participated with FOX Systems, Inc. in the development of program requirements and RFP for the Arizona Works Program. The design of the program was based on federal and State policies regarding eligibility determination and TANF requirements.

DESIGN & IMPLEMENTATION OF ARIZONA “CHILDS” CHILD WELFARE INFORMATION SYSTEM (1995–1998)

Served as Team Leader in the design, development and testing of the CHILDS Child Welfare Information System for the Arizona Department of Economic Services under subcontract to UNISYS. The project successfully developed and implemented Intake and Investigation, Case management, Eligibility Determination for Title XIX and Title IV-E, Service Authorization and Payment, and Financial Management in a client server environment. Dr Walsh led the design of Intake/Investigation, Case Management and Eligibility Determination. The system incorporated State and federal Medicaid policies to ensure accurate eligibility determination, in order to maximize federal reimbursement.



INFORMATION ENGINEERING DESIGN AND DEVELOPMENT (1994 – 1995)

Served as Team leader for system development and re-engineering of Medicaid Reinsurance program for the AHCCCS Program in Arizona,. The project used business process re-engineering to restructure the program and developed an information system to support the new processes. The system development utilized Knowledgeware Case Tools for the design and development stages.

INFORMATION ENGINEERING DESIGN AND DEVELOPMENT (1994 – 1995)

Served as Primary Business Systems Analyst in the re-design of the Agency's claims processing systems for the Arizona AHCCCS Program. The system design utilized an artificial intelligence framework to base claims processing on table structures that facilitated workflow management and claim disposition. The table structures implemented applicable State and federal Medicaid policies.

SYSTEM CERTIFICATION (1994)

Contracted with the Arizona AHCCCS System to prepare for and pass the HCFA System Performance review needed to maintain certification of Medicaid Management Information Systems (MMIS). Was one of two staff responsible for defining strategies and participating in the review with HCFA staff.

DEVELOPMENT OF MEDICAID MANAGED CARE INFORMATION SYSTEMS (1987 – 1994)

Under Subcontract to the Arizona Health Care Cost Containment System (AHCCCS), served as team leader for development and testing of the PMMIS information system. Duties included specification of design requirements, development of test plans, testing, and system implementation. Dr. Walsh led the team that developed the long term care management, and was a lead analyst in designing the member eligibility and enrollment subsystem. That subsystem incorporated State and federal policies and rules in maintaining a hierarchy of Medicaid eligibilities and both manual and automated enrollment into MCOs. It was the first system in the nation to develop and implement this functionality.

MANAGED CARE PROVIDER NETWORK DEVELOPMENT (1994)

Assisted Columbia Hospital Systems, Healthwest Hospital, and Paradise Valley Hospital in developing the network of primary care providers for the full risk contracting. The assistance included interpreting State and federal Medicaid policies related to service providers and managed care, and designing a network that met all requirements.

DRG HOSPITAL REIMBURSEMENT (1993)

Assisted the Illinois Department of Public Aid in designing a DRG based hospital reimbursement system. The work included definition of issues and policy questions, cost definition using Medicare and Medicaid cost reports, and statistical analysis of alternatives. The project developed a

reimbursement system that complied with State and federal policies and requirements related to hospital reimbursement.

MANAGEMENT OF RESIDENTIAL CARE SERVICES (1993 – PRESENT)

For The Lord's Ranch, Warm Springs Arkansas, provided ongoing management consulting services, including management systems requirements analysis, development of application programs and implementation of IT services, implementation of management controls and initiatives in administration, residential programming, social service delivery, and education.

REQUIREMENTS ANALYSIS FOR AN INTEGRATED PUBLIC HEALTH INFORMATION SYSTEM (1993)

Under subcontract with the Illinois Department of Public Health, participated in the requirements analysis and design for the Cornerstone System. The system integrated public Health programs, including WIC, Infant Health, Immunizations, Maternal Health, and STD in one information system. The system was developed using a distributed database system with a WAN architecture, using FoxPro with a central DB2 database. Cornerstone became the model for Illinois distributed data systems.

DEVELOPMENT OF CHILD WELFARE SYSTEM REQUIREMENTS (1993)

For the Illinois Department of Children and Family Services, reviewed Management information systems and field operations, and developed a requirements definition. The project included development of a working prototype system in Oracle to demonstrate the required system features

CHILD WELFARE CASELOAD AND SERVICE MODELING (1992)

For the Los Angeles County Department of Children's Services, developed a child welfare caseload model to project cases and members. The model was used to evaluate budget projections and State audit findings. Helped to negotiate a resolution of funding issues with the State of California.

COST EFFECTIVENESS OF DD SERVICES (1992)

Conducted an evaluation of the cost effectiveness of DD programs in Arizona for the Governor's Council on DD. The evaluation covered organization of the DES Division of Developmental Disabilities, service planning and authorizations, and control of spending.

MIS SYSTEM EVALUATION AND SELECTION (1992)

Conducted an evaluation of management information system alternatives for Southwest Catholic Health Network. The Health Plan was in the process of evaluating its current vendor and considering several alternative vendors. The evaluation included development of a user requirements analysis, an assessment of the fit between the Plan's needs and each system alternative

under consideration, modeling of the fiscal implications of each alternative over the next six years, and recommendation of a preferred alternative.

MMIS IMPLEMENTATION (1991-1993)

As a contractor to the Arizona AHCCCS program, served as a team leader for the implementation of the PMMIS system. Served as the lead analyst working with the Claims Processing office to refine procedures to process FFS claims and reinsurance claims in a timely manner. Dr. Walsh re-engineered processes to improve the flow of claims from receipt through imaging, data entry, and adjudication. The project achieved compliance with federal and State policies regarding claims processing.

DEVELOPMENT OF POLICY POSITION FOR CHILDREN'S SERVICES (1990)

Under contract with the Child Care Association of Illinois, developed a database and position paper on an alternative budget for children's services in Illinois. The report analyzed historical spending patterns and identified important gaps in services.

COST ANALYSIS OF STATE OPERATED DD FACILITIES (1990)

Under Contract with the Texas Department of Mental Health and mental Retardation, developed an evaluation of the cost of State facilities operated by Texas with those operated by comparable states. The study identified several important factors which inhibited certification, including organizational, management, documentation, supervision, and program deficiencies.

PROJECT TO OBTAIN TITLE XIX FUNDING FOR MENTAL HEALTH SERVICES (1990)

Contracted with the Illinois Department of Mental Health and DD to assist in the development of service definitions, reimbursement rates, and negotiation with HCFA and the State Medicaid Office to qualify mental health services for Medicaid. The project reflected both standard Medicaid policies and waiver options to maximize Title XIX funding.

MMIS REQUIREMENTS AND TESTING (1990)

Assisted HMOs in the development and testing of MMIS systems required to meet AHCCCS health plan requirements. Arizona Health Concepts and Health Choice Arizona contracted for assistance with development of in-house systems. The project included interpretation of State and federal policies and requirements regarding participation in the AHCCCS program.

PROJECT TO DEVELOP COST AND SERVICE REPORTING AND A TITLE XIX REIMBURSEMENT SYSTEM (1988)

Contracted with State of New Mexico to develop a cost and service reporting system for Developmentally Disabled community services funded under Title XIX waiver provisions. Services included group homes, day programs, respite care, family education, and case management. The



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

project developed and implemented Service reporting and reimbursement which met all State and Federal Title XIX policy requirements.

EDUCATION

University of California, Berkeley – 1974, Ph.D. in Economics

University of Arizona – 1967, M.A in Economics

HARI CHITLURI, CERTIFIED PMP TECHNICAL SUPPORT / IV&V COMPLIANCE ANALYST

OVERVIEW

Mr. Hari Chitluri is a PMI-certified Project Manager for FOX Systems, Inc. with strong project and technical management, Medicaid Management Information System (MMIS), Decision Support System (DSS), and HIPAA experience. Mr. Chitluri also possesses the excellent written and verbal communications skills needed for team building and collaboration among all MMIS stakeholders.

His twelve years of IT experience includes analysis, design, development, integration, implementation and testing of large IBM mainframe and client/server application systems; the last five years of experience have been exclusively with MMIS systems in Mississippi and Missouri. His MMIS qualifications includes demonstrated experience and expertise in all MMIS subsystems, including Claims Processing, Recipient/IVR, Provider, Prior Authorization, TPL, Managed Care, POS/DUR, DSS, and Financial systems. Most recently, Mr. Chitluri has been leading HIPAA remediation testing for the entire Missouri MMIS.

RELEVANT SKILLS AND QUALIFICATIONS

- Certified Project Management Professional (PMP), Project Management Institute (PMI)
- In-depth knowledge of MMIS, DSS and POS/DUR functional requirements and system specifications
- Knowledge of HIPAA compliance requirements
- Proven risk management and quality assurance skills
- Hands-on technical qualifications in mainframe and client/server development tools, applications languages, operating systems, and file/database management system (including DB2 and Oracle)
- Excellent system architectural assessment and integration skills

EMPLOYMENT SUMMARY

ORGANIZATION	POSITION	DATES
FOX Systems, Inc.	Consultant / Project Manager	2004
Verizon Information Technologies	Project Manager, Medicaid Systems	2000 – 2004
GTE Data Services	Systems Analyst	1999 – 2000
Lab Corporation of America	Programmer/Analyst	1999
Independent Programmer/Analyst	Consultant	1992 – 1998

PROJECT SUMMARIES

STATE OF MISSOURI – VERIZON INFORMATION TECHNOLOGIES (JUNE 2003 – MARCH 2004)

Led the system testing team responsible for reviewing system test plans, setting up the test network, creating system test data, quality assurance, and promoting the HIPAA changes into a production environment. Worked with the Missouri MMIS maintenance team and an offshore development team to ensure a smooth flow of system testing, and timely implementation of the HIPAA changes. This was performed in a COBOL, SAS, MS Project 2000, ESP, DB2, INSYNC, and IAM technical environment.

STATE OF MISSISSIPPI – VERIZON INFORMATION TECHNOLOGIES (JANUARY 2003 – MAY 2003)

Led the team responsible for creation of report generating modules for the project which included the Recipient, TPL, Provider, and Managed Care subsystems of a new Mississippi MMIS. Responsibilities included analysis of existing system, creation of specifications based on the Envision design, project planning, scheduling, tracking on-shore and offshore development activities, quality assurance, and migration of the modules into the system test region.

STATE OF MISSOURI – VERIZON INFORMATION TECHNOLOGIES (JULY 2002 – DECEMBER 2002)

Led the project team incorporating necessary changes in the Missouri MMIS for interfacing with a new Disease Management system developed by Heritage. The team was responsible for gathering and refining requirements, and writing the functional design document for interaction between MMIS and Heritage's Smart PA application. The high level requirement was to extract required data from MMIS on a daily basis and transmit the data via FTP to Heritage, receive the drug PA transactions generated by clinical edits by Heritage's Smart PA application, and update the Prior Authorization file on MMIS for Pharmacy claim processing. Finally, the team was also involved in creating system test plans, system testing, user acceptance testing, and implementation of the changes.

STATE OF MISSOURI – VERIZON INFORMATION TECHNOLOGIES (NOVEMBER 2001 – JUNE 2002)

Participated on the project team implementing pharmacy claim processing enhancements to the Missouri MMIS's Pharmacy POS and DUR system. The work involved design, development, and implementation of an Edit Override Subsystem, improvements to the existing drug Prior Authorization sub system, internet and IVR accessibility to drug Prior Authorization sub system. Was responsible for gathering and refining requirements, creating functional design documents, system test plans, coding, testing, implementing and post production support.



STATE OF MISSOURI – VERIZON INFORMATION TECHNOLOGIES (JANUARY 2001 – MAY 2001)

Led a team of 4 to perform HIPAA Transactions and Code Sets Gap and Impact analysis for the Missouri MMIS. His duties included planning, organizing, and controlling team activities, and providing technical leadership to the team. The project objectives were to gather and analyze HIPAA requirements, and interactions with various HIPAA-related organizations such as the MOSNIP, NMEH, etc, in facilitating the HIPAA implementation.

STATE OF MISSOURI – VERIZON INFORMATION TECHNOLOGIES (OCTOBER 2000 – DECEMBER 2000)

Managed a 12-person team responsible for Maintenance and Enhancement of Missouri Medicaid Claim Processing System (MOMED). The enhancements included conversion of claims to various new formats, changes to Recipient eligibility logic, implementation of mass/individual claims adjustments, Point of Sale (POS) implementation for real time submission of drug claims, and implementation of Financial pricing and Accounts Receivable subsystems. Responsibilities included interaction with State DSS users, gathering requirements, functional analysis, high level design, coding, testing, implementation and documentation.

STATE OF MISSOURI – GTE DATA SERVICES (OCTOBER 1999 – SEPTEMBER 2000)

Served as a senior systems analyst for the maintenance and enhancement of the Missouri MMIS. Responsibilities included review of State of Missouri system change requests (STRs) and management of approved STRs through analysis, design, implementation and testing. Was personally involved in the analysis, impact analysis, development of requirements and specifications, and unit and system testing of the enhancements. Interacted with state users to obtain requirements and validate specifications.

LAB CORPORATION OF AMERICA, BURLINGTON, N.C. (JANUARY 1999 – SEPTEMBER 1999)

As a programmer analyst, converted and tested MSA financial system modules to MVS COBOL and also made them Y2K compliant. The new COBOL programs had to emulate the logic of a non-Y2K compliant MSA COTS system.

LAB CORPORATION OF AMERICA, BURLINGTON, N.C. (JANUARY 1999 – JUNE 1999)

As a programmer analyst, upgraded, converted and tested Quickjob reporting and made them Y2K compliant. The Quickjob programs were converted to Version Vision: Report 1.5.



AEGON – PFL LIFE INSURANCE COMPANY, LITTLE ROCK, AR (JANUARY 1998 – DECEMBER 1998)

As a programmer analyst, participated in the implementation of a new life insurance policy processing system – Cyberlife Release 9701. Worked on various tasks such as implementation of an Agents Information Network interface, modified the base system to support policies with Deferred Annuity Riders, made other system modifications, and created various reporting programs. Also created a library module that built an agents matrix of all agents receiving correspondence. Was part of the maintenance team including bug fixing and trouble shooting when necessary.

DUKE ENERGY Y2K CONVERSION, CHARLOTTE, N.C. (FEBRUARY 1997 – DECEMBER 1997)

Performed Y2K assessment for various COBOL and Easytrieve applications used by Duke Energy. Responsibilities included analysis of the program for impacted date fields, conversion of the programs for Y2K compliance, unit testing and integration testing Y2K compliance using the “fixed window” technique. Worked extensively with File-Aid for IMS, during testing. A thorough review was also done to ensure that all programs with critical dates were modified. A library of pre-defined date routines was used.

THOMSON’S DIRECTORIES, UK (JANUARY 1996 - JANUARY 1997)

Performed Y2K assessment for various COBOL and CICS applications used by Thompson’s Directories in the United Kingdom, including assessment of programs for impacted date fields, conversion of the programs for Y2K compliance, unit testing and integration testing Y2K compliance using the “fixed window” technique. Worked

EDUCATION

B.S., Engineering from Regional Engineering College, CALICUT, INDIA.

TECHNICAL SKILLS:

Hardware:	IBM ES9000, Pentium-PCs
Operating System:	MVS/ESA, Windows-95, Windows NT, OS/2, UNIX
Languages:	COBOL II, PL/1, C, SQL, ALC, EAZYTRIEVE, REXX, SAS
Mainframe Skills:	JCL, VSAM, DB2, IMS DB/DC, CICS, XPEDITER, FILEAID, CLIST, ABEND AID, DB2 UTILITIES, CEDA, ESP
Other Skills & Tools:	ORACLE 7.3, DEVELOPER 2000, VISUAL BASIC 4.0, JAVA 2 (Sun Certified), MF-Revolve, MF COBOL, MS EXCEL, FTP, MF-Smart Find, File-Aid/DB2, File-Aid/Data Ager, Endeavor, File-Aid/RDX, File-Aid/IMS, Sync Sort, Macro4 tools such as Insync, Trace Master, Dump Master

RICHARD BECKER, CERTIFIED PMP
TECHNICAL SUPPORT ANALYST / DATA WAREHOUSE EXPERT

OVERVIEW

Mr. Richard Becker, a Senior Consultant with FOX Systems, Inc., is a Data Warehouse/Decision Support technical analyst. He is knowledgeable about all phases of system development and is a proven developer with a track record of successful projects, meeting both financial and technical performance expectations and managing a team of over 50+ professionals. As a technologist and planner, he has been actively involved in product planning for future MMIS and data warehouse applications. His background encompasses product planning and product management for new technology, including data communications and web-based business applications.

RELEVANT SKILLS AND QUALIFICATIONS

- Expertise in application development, implementation, and maintenance of the data warehouse and decision support systems
- In-depth experience in systems analysis and strategic planning
- Knowledge of state health care information systems and business processes
- Outstanding communications skills

EMPLOYMENT SUMMARY

ORGANIZATION	POSITION	DATES
FOX Systems, Inc.	Business Analyst Consultant	2004 - Present
Affiliated Computer Services	Director –Business Intelligence	2001 - 2004
Evolution Networks	Director –Products and Services	2000 - 2001
BellSouth	Manager – Product Management	1998 - 2000
MCI	Senior Analyst	1997- 1998
Scott Paper Company	Channel Manager	1993-1996

PROJECT SUMMARIES

AFFILIATED COMPUTER SERVICES, INC.

- Directed the application development, implementation, and maintenance of the data warehouse systems and decision support system business unit.
- Responsible for strategic planning and product marketing for business intelligence product and service offerings.

- Improved product development and implementation timelines by over 30%, streamlining organizational competencies, investing in cost saving technological improvements, and implementing division-wide processes and methodologies.
- Led a major product integration initiative that provided a common framework for DSS software products, resulting in state security compliance, network accessibility for ASP business model, and efficient code-use, database interaction, and product interoperability.
- Instituted standard release and versioning methodology, coordinating cross-functional development activities, and reducing software defects.

As Director of Strategic Planning:

- Authored Business Architecture Model for state healthcare division.
- Published IT Strategy Reference Model for Enterprise Architecture initiative.
- Implemented product management strategy and product lifecycle management approach, impacting the management of product portfolio consisting of 6 product lines and 20+ products.

EVOLUTION NETWORKS

- Responsible for strategic planning and tactical implementation of product portfolio, leading development and marketing efforts for managed network and server system products from concept through design.
- Authored product requirement documents for 10 discrete products under the categories of Managed Hosting, Managed Storage, Intelligent Routing, Managed Security, and Managed Network.
- Developed competitive positioning analysis, detailed design documents, OSS requirements, vendor selection criteria, and product marketing descriptions.
- Wrote white paper discussing market dynamics, disruptive technology, and new business opportunities in the Wireless telecommunications industry.
- Team lead for cross-functional workgroup addressing Metasolv implementation, billing implementation, and process flow dictionary.

BELL SOUTH

- Managed product marketing, strategic planning, and tactical support for e-Business product portfolio, leading lifecycle, concept introduction, and launch activities for hosted Web services.
- Created all documentation for product set, establishing product “playbook” for service portfolio.
- Led evaluation of strategic partnerships to incorporate next-generation technology into product line and participated with executive mergers and acquisition (M&A) team in corporate acquisition strategy and evaluation exercise.
- Authored white paper promoting strategic shift from professional services to facilities-based managed services, resulting in the highly regarded BellSouth e-Business Center initiative.
- Developed and launched BellSouth e-Business Center initiative, closing initial customers.
- Recognized with “BellSouth Signal Award” for outstanding individual achievement.

MCI, SENIOR ANALYST

- Provided financial planning and analysis for new product business case development and strategic business opportunities.
- Developed financial business case for emerging products.
- Developed sophisticated pricing models for data transport and Internet services.
- Served as subject matter expert for regional business development and account teams.
- Wrote financial business case for Web Hosting and Click n'Connect products
- Provided strategic guidance and deal approval on major customer opportunities, including Amazon.com, The Weather Channel, The Gap, and Fidelity Investments.

SCOTT PAPER COMPANY, CHANNEL MANAGER

- Managed commercial distribution channels, with focus on training, account development, and the development of channel marketing strategies.
- Managed, trained, and supported wholesale distribution channels for paper product lines.
- Improved market price realization, market share expansion, product mix, and channel relations.
- Championed market diversification initiative, playing key role in new product rollouts, and effectively managed competing channel partners in geographic territory.
- Displaced key competitor in South Georgia market, turning around an under-performing channel partner.

EDUCATION

University of Georgia – Athens, GA
MBA, Concentration in Marketing and Organizational Development

Wake Forest University – Winston-Salem, NC
B.A., Major in English Literature, Minor in Computer Science

DESH AHUJA TECHNICAL ADVISORY GROUP

OVERVIEW

Desh Ahuja is the Executive Vice President of FOX Systems, Inc. He is an MMIS expert, with over 25 years of operations and project management experience in Medicaid and Medicare programs. His background includes extensive procurement and system development experience, and in the last twelve years, he assisted a number of state, county, and private sector clients with large IT procurement projects, including the States of Florida, Georgia, Alaska, New Mexico, Arkansas, Arizona, Tennessee, and Oregon and Maricopa County, Arizona.

Prior to joining FOX in 1992, Mr. Ahuja was the CIO of the State's Medicaid Program, the Arizona Health Care Cost Containment System (AHCCCS). In this capacity, he was responsible for designing and implementing many components of the 1115 waiver, as well as and the entire Prepaid Medical Management Information System (PMMIS) and the Arizona Long Term Care System (ALTCs) programs. In one of the largest and the longest lawsuits in the history of AHCCCS, Mr. Ahuja was called upon to be a State expert witness to clarify State's position on the provision of services to the Mental Health and Developmentally Disabled population. Mr. Ahuja was one of the key founding operational managers of the AHCCCS program.

In his capacity as the Systems Director of the McAuto Systems Group, Inc., Mr. Ahuja was responsible for establishing the IS department and the installation and enhancements of the New York State Medicaid Management Information System to support the prepaid nature of the Arizona Medicaid program. This system was replaced in 1991 with the PMMIS, the first ever RDBMS-based MMIS.

EMPLOYMENT SUMMARY

ORGANIZATION	POSITION	DATES
FOX Systems, Inc.	Partner, Executive Vice President	1992 – Present
Arizona Health Care Cost Containment System	Assistant Director for MIS	1984 – 1992
McAuto Systems Group Inc.	System Development Director	1983 – 1984
Medicare Claims – Bradford National	Project Director	1981 – 1983
National Benefit Life Insurance Corp.	MIS Manager	1981 – 1981
Bradford National Corporation	System Development/MMIS Manager	1977 – 1981
Federal Reserve Bank of New York	Programmer Analyst	1975 – 1977

PROJECT SUMMARIES

GEORGIA DEPARTMENT OF MEDICAL ASSISTANCE (DMA)

Managed a number of key strategic planning, systems integration, business process re-engineering, and procurement projects for the State of Georgia, including:

- The evaluation of the eligibility systems integration with MMIS,
- Procurement of the Decision Support System,
- Procurement of an integrated financial accounting system,
- Conducting data flow and data communication analysis within the existing MMIS and the proposed MMIS,
- Conducting business process re-engineering and workflow analysis for the Medical Assistance Department, and
- Procurement of the replacement MMIS.

This was an important, high-visibility project that occurred at a time of transition for the State of Georgia. The Medicaid fiscal agent contract was ending and the State had determined that a replacement system was required. The project involved several months of consensus building and strategic planning workshops with high-level and mid-level agency participation and meetings with private sector representatives, resulting in an Advance Planning Document (APD) containing the results of the workshops and a Request for Proposal (RFP). The project also involved planning for increased privatization, resulting in a multiple-vendor model for contract services.

STATE OF ALASKA DIVISION OF MEDICAL ASSISTANCE

Served as Project Manager for the development of requirements, cost benefit analysis, recommendations on new technology, development of the RFP and evaluation plan, and future monitoring of the selected system solution.

STATE OF ARIZONA, DEPARTMENT OF ECONOMIC SECURITY

Directed a project to assess the status of systems supporting the Development Disabilities program and recommend enhancements.

STATE OF FLORIDA - DEPARTMENT OF HEALTH AND REHABILITATIVE SERVICES

Served as Project Manager/Senior Consultant for the entire procurement-monitoring contract for the State of Florida. Supported the RFP procurement, development of evaluation manual, staff training, development of acceptance test plans and acceptance test documents, acceptance testing of new functions such as imaging and retrieval, POS claims submission, electronic member eligibility verification, ProDUR, and the generation of plastic Medicaid ID cards with magnetic strips.



PCS HEALTH SYSTEMS

Assisted this large Pharmacy Benefits Manager (PBM) in the development of a nationwide provider network of home-infusion pharmacies.

ARGUS HEALTH SYSTEMS, KANSAS CITY, MISSOURI

Managed a project to design a PC-based drug manufacturer rebate system.

STATE OF ARIZONA HEALTH CARE COST CONTAINMENT SYSTEM

Director of the Information Resources Management Division for the Arizona State Medicaid Agency (AHCCCS). Expert witness in litigation with the MMIS contractor. Responsible for building the MMIS department from the start of the program. Responsible for maintaining and enhancing the Medicaid Management Information System and all EDP operations. Responsible for all phases of the development and implementation of a federally-funded new Prepaid Medical Management Information System (PMMIS), which replaced the MMIS in 1991. Responsibilities included: requirements analysis, RFP and APD development, procurement management, selection and monitoring of contractor, systems test, conversion and federal certification.

The PMMIS was developed using the relational database technology (DATACOM/DB) and fourth generation IDEAL language. In addition to the development of PMMIS, installed a five-module MSA accounting and financial system as an integral part of the PMMIS databases. The mainframe system was fully networked with a statewide WANG office automation system, WANG imaging system, and Local Area Network of IBM personal computers using Banyan networking technology.

Previously, as System Development Director for McAuto Systems Group, Inc., headed the Systems Development Group of the Management Information System for the McAuto Medicaid fiscal agent contract in Arizona. Responsible for the transfer and enhancements of the New York MMIS to Arizona in five months.

NATIONAL BENEFIT LIFE INSURANCE COMPANY

As Project Manager, conducted a complete design review of the new Group Claims Processing System. Also conducted hardware and software reviews for installing new mainframe laser printers and an Indemnity System.

BRADFORD NATIONAL CORPORATION - MEDICARE PART B

As Project Manager, Medicare Claims for Bradford National Corporation, managed the Part B Medicare Claims Processing and Payment System for multiple National Carriers such as Aetna and Blue Cross Blue Shield of Minnesota. Managed the transfer of the complete computer system from California to New Jersey.



STATE OF NEW YORK, MEDICAID MANAGEMENT INFORMATION SYSTEM

As Manager, System Development, Medicaid Management Information System for Bradford National Corporation, managed the design, development, implementation and management of the claims processing system for the New York Medicaid program.

NATIONAL BENEFIT LIFE INSURANCE COMPANY

As Project Manager, conducted a complete design review of the new Group Claims Processing System. Also conducted hardware and software reviews for installing new mainframe laser printers and an Indemnity System. Moved to Phoenix to take over the new assignment with Arizona Health Care Cost Containment System (AHCCCS) fiscal agent, MSGI.

EDUCATION

B.S., Mathematics, Punjab University, India

B.S., Chemical Engineering, Punjab University, India

Graduate Work towards Master of Business Administration, Graduate School of Business Administration, New York University

HARDWARE/SOFTWARE

- IBM 3090 series; WANG 7300 series; Burroughs 2700 series; Personal Computers/ Workstations; Novell, Banyan and 3-COM Local Area Networks; Imaging Systems
- DATACOM/DB; IDEAL; CICS/VSAM; COBOL; XBASE; Spreadsheets; Word processors

PROFESSIONAL ORGANIZATIONS

- American Management Association; ACM; Institute of Electrical and Electronics Engineers
- American Institute of Chemical Engineers



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

Personnel References

As part of Amendment 1, DHS has asked for personnel references that were previously not required. This section provides personnel references for all project staff, including both staff members whose resumes were previously submitted and newly added staff members whose resumes are found above.

TEAM MEMBER	PERSONNEL REFERENCE #1	PERSONNEL REFERENCE #2	PERSONNEL REFERENCE #3
Bill Larkin <i>Client Executive</i>	William H. Barnett, Consultant Brandt Information Services, Inc. (850) 385-5836	Herman J. Strahan Vice President, eCommerce Strategy Eastman Kodak (954) 444-0247	Worth F. Green Vice President Operations Consultec (770) 594-7799
Pearlene Ryan <i>Project Manager</i>	Janice Reckenberg Bank of America (602) 597-3954	Marion Stewart America West Airlines (602) 417-4650	Linda Young GTE Data Services (602) 537-3208
Jim Elco <i>Deputy Project Manager</i>	Mary Tavegia, Executive Officer Iowa Department of Human Services (515) 281-6555	Tim Zevnik, HIPAA Program Manager Molina Healthcare (562) 435-3666, ext. 4265	Dr. William Johnson, Professor School of Health Administration and Policy Arizona State University (480) 965-7442
Bruce Weydemeyer <i>Medical Policy and SME Team Lead</i>	Mary Tavegia, Executive Officer Iowa Department of Human Services (515) 281-6555	Jeff Hubbard, Medical Assistance Administrator State of Alaska (907) 334-2453	Mr. Scott Mayne (Former MMIS Project Manager, Nevada Division of Health Care Financing and Policy) Fiscal Manager Washoe County Social Services (775) 328-2335
Frank Matina <i>Technical Support Team Lead</i>	Gordon Welch Medicaid Systems State of Washington (360) 352-3696, ext. 37	Neesa Warlen Assistant to the Director of Human Services Broward County, Florida (954) 357-6748	Patrick Cosgrove Acting Director – Information Technology Services Hillsborough County, Florida (813) 272-5890





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

TEAM MEMBER	PERSONNEL REFERENCE #1	PERSONNEL REFERENCE #2	PERSONNEL REFERENCE #3
Mary Jane Teirumniks <i>Business Activities and Monitoring Team Lead</i>	Dawn Chittenden OVHA HIPAA Coordinator Office of Vermont Health Access (802) 241-2886	Ken Barker Director of Information Services Bureau of TennCare (615) 741-2008	Henry Chao, Technical Director Centers for Medicare and Medicaid Services (CMS) (410) 786-7811
John Cole <i>IV&V Compliance Team Lead</i>	Ken Barker Director of Information Services Bureau of TennCare (615) 741-2008	Tom Mathis Bureau of TennCare Director of Fraud and Abuse (615) 741-7431	Max Arnold Office of Information Resources TCMIS Project Manager – Interfaces and Conversion (615) 253-4382
Tom Walsh <i>Medicaid SME</i>	Carol Jeffries Implementation Manager Kentucky UniPAS Project (804) 559-5876	Joan Burley Assistant Project Manager UNITY Project (562) 883-5699	Gary Heller, Project Manager HIPAA Projects AHCCCS (602) 417-4380
Hari Chitluri <i>Technical Support Team Analyst / IV&V Compliance Team Analyst</i>	Jeff Peterson ACS Inc. (651) 686-0015	Kim Maroney Verizon Information Technologies Inc. (573) 635-2434 ext. 5310	Jeff Stafford Verizon Information Technologies Inc. (573) 635-2434, ext. 5378
Janet Oliver <i>Technical Support Team Analyst / IV&V Compliance Team Analyst</i>	Rocco Russo TPL Mgr. / Medically Needy Mgr. ACS, Inc. (515) 327-0950, ext. 1114	Diane Lundberg Former Project Manager Iowa Foundation for Medical Care (515) 265-4848	
Richard Becker <i>Technical Support Team Analyst / Data Warehouse Expert</i>	Dave Sanek Project Manager Contractor - GA Department of Education (404) 656-5829	Ann Olevitch Director of Project Management Office ACS (678) 352-7248	Clay Whitfield Programmer Analyst London Bridge Group (678) 372-3536
Nancy Shump <i>Business Activities and Monitoring Team Analyst / IV&V Compliance Team Analyst</i>	Mary Tavegia, Executive Officer Iowa Department of Human Services (515) 281-6555	Jeff Hubbard, Medical Assistance Administrator State of Alaska (907) 334-2453	Ms. Bari Kerr Former MMIS Procurement Director Georgia Department of Medical Assistance (770) 487-9838
Karen Perkins <i>Business Activities and Monitoring Team Analyst</i>	Ken Barker Director of Information Services Bureau of TennCare (615) 741-2008	Mary Gerlach, Former CIO New Mexico Department of Health Public Health Division (505) 982-0417 (Home)	Kathie Clayton Vice President of Operations/CFO The Sycamores (626) 395-7100, ext. 2502





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

TEAM MEMBER	PERSONNEL REFERENCE #1	PERSONNEL REFERENCE #2	PERSONNEL REFERENCE #3
Larry Bookhamer <i>Business Activities and Monitoring Team Analyst / Project Support Staff</i>	Jean Fong Consultant (510) 522-7797	Joel Honigbaum Consultant (317) 257-0300	
Robin Pratt <i>IV&V Compliance Team Analyst</i>	Mr. Henry Chao, Project Manager Centers for Medicare and Medicaid Services (410) 786-7811	T.J. MacGuire, Team Lead SURS Development Project (Retired) First Health Services Corporation (804) 714-2614	George Drumwright Deputy County Manager for Community Services Henrico County, Virginia (804) 501-4515
Susan Fox <i>Technical Advisory Group</i>	Mr. Henry Chao, Technical Director Centers for Medicare/Medicaid Services (410) 786-7811	Mr. Scott Mayne, Fiscal Manager Washoe County Social Services (Former MMIS Project Manager, Nevada Division of Health Care Financing and Policy) (775) 328-2335	Ms. Denise Bazemore Project Director Centers for Medicare/Medicaid Services (410) 786-4449
Desh Ahuja <i>Technical Advisory Group</i>	Wade Miller Chief Information Officer Georgia Department of Community Health (404) 656-2343	Jim Joyce, MMIS Project Manager Oregon Department of Human Services Office of Information Services (503) 378-2101 x357	Ken Barker Director of Information Services Bureau of TennCare (615) 741-2008
Kathleen Connor <i>Technical Advisory Group</i>	Ms. Joan Bant Health Policy Professor The Evergreen State College (360) 866-6000	Mr. William Hagens Senior Health Policy Analyst Washington State Office of the Insurance Commissioner (360) 725-1611	Ms. Deborah Senn Former Washington State Insurance Commissioner (260) 583-2190
Manny Mkrtychian <i>Technical Advisory Group</i>	Karen Elliott, HIPAA Program Manager L.A. Care Health Plan (213) 694-1250, ext.4308	Kathie Clayton Vice President of Operations/CFO The Sycamores (626) 395-7100, ext. 2502	Ms. Zina Glodney, CIO Los Angeles County Department of Health Services (213) 240-8128



Job Descriptions

The following table contains job descriptions for all proposed project staff. Asterisks indicate staff whose resumes are not included in this proposal.

Table 3: Job Descriptions

JOB TITLE	JOB DESCRIPTION	STAFF
Client Executive	Corporate responsibility for success of I&SS project; monitors FOX team; attends key meetings; participates in presentations and meetings; resolves critical problems 10 years or more experience in Medicaid MMIS takeover and design projects	Bill Larkin
FOX Project Manager	Full-time position. Manages PMO and all I&SS teams; attends most meetings, reviews deliverables, responsible for schedule deadlines, directs and manages FOX staff, responsible for all reporting requirements, resolves team issues, interacts with IME contractors 10 years or more experience in Medicaid MMIS takeover and design projects; managing complex projects; major migrations to new buildings	Pearlene Ryan Edward Foster
FOX Deputy Project Manager	Assists Project Manager in all PMO activities; stands in for PM when appropriate; works closely with all teams and Department staff; assists project team with Business Analysis activities and tasks.	Jim Elco
Project Management Office Team Lead	Subset of Project Manager requirements	Pearlene Ryan Edward Foster
Administrative Support Personnel	Responsible for supporting day-to-day tasks such as: <ul style="list-style-type: none"> • Scheduling meetings and distributing meeting notices • Distribution of agendas for meetings • Assistance with preparation of meeting minutes and distribution of meeting minutes to participants for review • Updating meeting minutes, as necessary • Assistance with preparation of “decision documents” • Assisting with maintenance of materials in the Electronic Project Library • Coordination of travel for FOX Project Team • Other administrative duties 	To Be Determined (Local Resource)

JOB TITLE	JOB DESCRIPTION	STAFF
Medicaid Program Policy Expert Team Lead	<p>Full-time position. Responsible for providing expert insight on Federal and state-level Medicaid policy, including:</p> <ul style="list-style-type: none"> • Medicaid “best practices” and Medicaid program trends • Federal legislative issues and pending Medicaid policy changes • Review of related Federal healthcare policy changes • Support of I&SS Contractor activities 	Bruce Weydemeyer
Medicaid Program SME	Responsible for providing Medicaid Policy support to the Medicaid Program Policy Expert Team Lead and the I&SS Contractor during project tasks	Tom Walsh
Technical Support Team Lead	Responsible for managing all technical tasks, e.g., extracting business rules, maintaining data bases, testing for parallel systems; 10 or more years experience in managing MIS and information technology projects; experience in full range of legacy and state of the art technology	Frank Matina
Technical Support Team Analysts	<p>Responsible for performing technical tasks such as:</p> <ul style="list-style-type: none"> • Business Rules extraction • Maintaining project databases • Parallel Systems Test Design 	Hari Chitluri Janet Oliver
Technical Support Team Analyst / Data Warehouse Expert	<p>Responsible for performing technical tasks specific to the development of the IME Data Warehouse and the IME Decision Support tools. Such tasks include:</p> <ul style="list-style-type: none"> • Data Warehouse technical compliance reviews • Assessment of Data Warehouse Planning Documents • Technical accuracy and completeness of DW/DS Contractor activities • Assessment of DW/DS interfaces • Data Warehouse problem / risk identification • DW/DS Contractor deliverable review • Facilitation and monitoring of Data Warehouse development meetings • Assistance with Connectivity Master Plan • Assistance with Design and Installation Infrastructure Assessments • Assessment of relevant application software 	Richard Becker

JOB TITLE	JOB DESCRIPTION	STAFF
	<ul style="list-style-type: none"> Monitoring and assessment of data conversions 	
Business Activities and Monitoring Team (BAM) Lead	Responsible for all BAM tasks: workflow analysis, standards compliance, analysis of issues and issue resolution; 10 or more years in Medicaid program policy, operations, and systems; experience in workflow analysis; experience in managed care and fee-for-service	Mary Jane Teirumniks
Business Activities and Monitoring Team (BAM) Analysts	Performs workflow analysis, maintains WFM database, assists in resolving workflow issues; provide facilities planning and management.	Nancy Shump Karen Perkins Larry Bookhamer
Workflow Architect	Responsible for providing expert Workflow Process Management system development expertise; Position to be hired upon selection of Core MMIS contractor and corresponding WPM system	To Be Determined (TBD)
IV&V Compliance Team Leader	Responsible for managing all IV&V activities. Skilled in IEEE and ISO standards for verification and validation; 10 or more years of experience in IV&V	John Cole
IV&V Compliance Team Analysts	Experience in MMIS IV&V; IV&V staff are assigned to IV&V activities	Nancy Shump Hari Chitluri Janet Oliver Frank Matina Robin Pratt
Technical Advisory Group	Senior consultants with 20 or more years of experience in high-level positions in Medicaid agency operations, MMIS, and/or consulting assignments	Susan Fox Desh Ahuja Kathleen Connor Bruce Weydemeyer Manny Mkrтчichian

Value of FOX Project Organization

FOX is fully committed to Iowa's initiative to begin a new direction by tackling the formidable challenge of achieving a new level of efficiency for Medicaid program administration. Establishing the Iowa Medicaid Enterprise is the kind of challenge that demands that the job be **done** right. Iowa will be a showcase for the new paradigm of Medicaid. To do the job right, each organization that is involved must assemble a strong team of the very best people. FOX has **done** its part **by putting together a team of experts**, and we look forward to working with you to assemble and shape all **contractor** participants into a single powerful Medicaid enterprise.

On-Site Presence of Proposed Staff (RFP 4.2.5.4.1)

For each phase, make a table listing by name and position the number of days they will be on-site. Use the following table for allocating number of days. Table assumes 21 working days per month.

Phase	Days
1	74*
2	126
3	126
4	189

*Assumes a 15 March 2004 start date

For example:

Position	Name	Days on Site
Core Project Staff*		
Project Manager	Alice	74
Job Title	Bob	74
Job Title	Carol	74
Job Title	Dawn	74
Business Analyst		
Job Title	Ed	23

*The Core Project Staff are expected to be on-site full time.

FOX fully understands the need for I&SS contractor activities to be on-site in Des Moines. The requirements for the roles of the contractor are ones that require a constant presence and the ability to communicate and coordinate with DHS and the component contractors. The development of the IME, which by definition is a centralized operational model, is an on-site activity as described in RFP Section 3.2.1.

The FOX approach to project staffing is built around the use of a core team of highly experienced staff that are supplemented by additional FOX subject matter experts for particular tasks that can benefit from their experience and skill sets. To assist DHS in planning, we have developed the chart below to illustrate how additional staff supplements core staff in each phase of the project. In addition, some core staff roles are *adaptive*; as the needs of the project change in later phases, staff assume different roles to not only support the work, but also to best utilize their project experience in the implementation phase.

The following tables list the names and positions of each of proposed project team member and provide the number of days, by project phase, that each will work on-site.

Please refer to the Project Schedule for each phase to determine scheduled activities for the teams. The Team Leads are on-site fulltime for scheduled tasks for each team in each phase.

Table 4: Phase 1 Onsite Staffing

Position	Name	Days on Project	Days On-Site	Total Phase Days	On-Site as % of Days on Project
Core Project Staff					
Project Manager	Pearlene Ryan	53	53	53	100.0%
Medicaid Policy Expert Lead	Bruce Weydemeyer	53	53	53	100.0%
Admin. Support Person	Admin. Support Person	53	53	53	100.0%
Technical Support Team Lead	Frank Matina	53	53	53	100.0%
Business Activities and Monitoring Team Lead	Mary Jane Tierumniks	32	32	53	100.0%
Other Project Staff					
Client Executive	Bill Larkin	8	6	53	75.0%
Deputy Project Manager	Jim Elco	40	16	53	40.0%
IV&V Team Lead	John Cole	8	6	53	75.0%
Technical Support Analyst / IV&V Compliance Analyst	Jan Oliver	40	40	53	100.0%
Technical Support Analyst / IV&V Compliance Analyst	Hari Chitluri	40	40	53	100.0%
Technical Support Analyst / Data Warehouse Expert	Richard Becker	40	40	53	100.0%
BAM Analyst / IV&V Compliance Analyst	Nancy Shump	20	15	53	75.0%
Medicaid Policy SME	Tom Walsh	53	53	53	100.0%
Advisory Group					
TAG	Susan Fox	2	2	53	100.0%
TAG	Desh Ahuja	2	2	53	100.0%
TAG	Manny Mkrtychian	1	1	53	100.0%
TAG	Kathleen Connor	1	1	53	100.0%

Table 5: Phase 2 Onsite Staffing

Position	Name	Days on Project	Days On-Site	Total Phase Days	On-Site as % of Days on Project
Core Project Staff					
Project Manager	Pearlene Ryan	126	126	126	100.0%
Medicaid Policy Expert Lead	Bruce Weydemeyer	126	126	126	100.0%
Admin. Support Person	Admin. Support Person	126	126	126	100.0%
Business Activities and Monitoring Team Lead	Mary Jane Tierumniks	63	63	126	100.0%
IV&V Team Lead	John Cole	63	63	126	100.0%
Other Project Staff					
Client Executive	Bill Larkin	12	8	126	66.7%
Deputy Project Manager	Jim Elco	96	27	126	28.1%
Technical Support Team Lead	Frank Matina	60	50	126	83.3%
Technical Support Analyst / IV&V Compliance Analyst	Jan Oliver	85	80	126	94.1%
Technical Support Analyst / IV&V Compliance Analyst	Hari Chitluri	110	110	126	100.0%
Technical Support Analyst / Data Warehouse Expert	Richard Becker	100	90	126	90.0%
BAM Analyst / IV&V Compliance Analyst	Nancy Shump	85	80	126	94.1%
BAM Analyst	Karen Perkins	32	24	126	75.0%
BAM Analyst / Project Support	Larry Bookhamer	5	5	126	100.0%
IV&V Compliance Analyst	Robin Pratt	45	40	126	88.9%
Medicaid Policy SME	Tom Walsh	126	126	126	100.0%
Workflow Architect	Workflow Architect	75	75	126	100.0%
Advisory Group					
TAG	Susan Fox	2	2	126	100.0%
TAG	Desh Ahuja	2	2	126	100.0%
TAG	Manny Mkrтчhian	1	1	126	100.0%
TAG	Kathleen Connor	1	1	126	100.0%

Table 6: Phase 3 Onsite Staffing

Position	Name	Days on Project	Days On-Site	Total Phase Days	On-Site as % of Days on Project
Core Project Staff					
Project Manager	Pearlene Ryan	126	126	126	100.0%
Medicaid Policy Expert Lead	Bruce Weydemeyer	126	126	126	100.0%
Admin. Support Person	Admin. Support Person	126	126	126	100.0%
Business Activities and Monitoring Team Lead	Mary Jane Tierumniks	63	63	126	100.0%
IV&V Team Lead	John Cole	126	126	126	100.0%
Other Project Staff					
Client Executive	Bill Larkin	10	8	126	80.0%
Deputy Project Manager	Jim Elco	72	24	126	33.3%
Technical Support Team Lead	Frank Matina	65	60	126	92.3%
Technical Support Analyst / IV&V Compliance Analyst	Jan Oliver	92	87	126	94.6%
Technical Support Analyst / IV&V Compliance Analyst	Hari Chitluri	110	110	126	100.0%
Technical Support Analyst / Data Warehouse Expert	Richard Becker	80	75	126	93.8%
BAM Analyst / IV&V Compliance Analyst	Nancy Shump	100	90	126	90.0%
BAM Analyst	Karen Perkins	40	35	126	87.5%
BAM Analyst / Project Support	Larry Bookhamer	5	5	126	100.0%
IV&V Compliance Analyst	Robin Pratt	60	55	126	91.7%
Medicaid Policy SME	Tom Walsh	126	126	126	100.0%
Workflow Architect	Workflow Architect	95	95	126	100.0%
Advisory Group					
TAG	Susan Fox	2	2	126	100.0%
TAG	Desh Ahuja	2	2	126	100.0%
TAG	Manny Mkrtychian	2	1	126	50.0%
TAG	Kathleen Connor	2	1	126	50.0%

Table 7: Phase 4 Onsite Staffing

Position	Name	Days on Project	Days On-Site	Total Phase Days	On-Site as % of Days on Project
Core Project Staff					
Project Manager	Pearlene Ryan	189	189	189	100.0%
Medicaid Policy Expert Lead	Bruce Weydemeyer	189	189	189	100.0%
Admin. Support Person	Admin. Support Person	189	189	189	100.0%
Other Project Staff					
Client Executive	Bill Larkin	12	8	189	66.7%
Deputy Project Manager	Jim Elco	12	8	189	66.7%
Business Activities and Monitoring Team Lead	Mary Jane Tierumniks	40	35	189	87.5%
IV&V Team Lead	John Cole	36	18	189	50.0%
BAM Analyst / IV&V Compliance Analyst	Nancy Shump	66	57	189	86.4%
BAM Analyst / Project Support	Larry Bookhamer	5	5	189	100.0%
Medicaid Policy SME	Tom Walsh	54	54	189	100.0%
Workflow Architect	Workflow Architect	15	15	189	100.0%
Advisory Group					
TAG	Susan Fox	3	2	189	66.7%
TAG	Desh Ahuja	3	2	189	66.7%
TAG	Manny Mkrtychian	2	1	189	50.0%
TAG	Kathleen Connor	2	1	189	50.0%



Maximum/Minimum Number On-Site Staff by Phase/Month (RFP 4.2.5.4.2)

List the maximum and minimum number of on-site staff by month to assist us in allocating resources. For example:

<i>Phase/Month</i>	<i>Maximum</i>	<i>Minimum</i>
<i>One</i>		
<i>Month</i>		
<i>Month</i>		
<i>Two</i>		

FOX is making a major commitment of resources to assist in the development and implementation of the IME. The table below summarizes this on-site staff commitment in each phase from month-to-month during the project. Please note that we have based this chart on the assumptions provided in Section 4.3.5.4.1 and in the Proposed Project Timeline for the Implementation and Support Services Contract.

Table 8: Maximum/Minimum Number of Onsite Staff by Month by Phase

Phase 1	Maximum	Minimum
April, 2004	17	7
May, 2004	13	7
June, 2004	13	7
Phase 2	Maximum	Minimum
July, 2004	15	8
August, 2004	15	8
September, 2004	15	8
October, 2004	15	8
November, 2004	15	8
December, 2004	15	8
Phase 3	Maximum	Minimum
January, 2005	15	8
February, 2005	15	8
March, 2005	15	8
April, 2005	15	8
May, 2005	15	8
June, 2005	15	8
Phase 4	Maximum	Minimum
July, 2005	9	4
August, 2005	9	4
September, 2005	9	4
October, 2005	8	4
November, 2005	8	4
December, 2005	7	4
January, 2006	7	4
February, 2006	6	4
March, 2006	6	4



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

FOX understands that the timeline for the project is likely to evolve as the Master Work Plan (MWP) is developed and executed during the implementation. The information provided in the table is for planning purposes; FOX will staff the project based on the requirements to support each of key activities throughout the course of the project.

SERVICE REQUIREMENTS (RFP 4.2.6)

ACTIVITIES APPLICABLE TO ALL PHASES (RFP 3.2.1 AND 5.4.2)

The activities and skill sets needed throughout this project include **extensive general Medicaid Program policy expertise and strong project management skills** to manage a multi-faceted, interconnected project. Bidders are encouraged to partner with others to assemble the various skill sets needed throughout the term of the Contract. The Contractor will be expected to be on-site unless, at the sole discretion of the Department, other arrangements are made. The successful bidder must be able to keep the big picture in focus as well as handle the multitude of detail from multiple contractors comprising the Iowa Medicaid Enterprise (IME). It is important that each phase be completed on time. **The requirements of this RFP require the successful bidder to bring all necessary skill sets and required expertise to this project. State Subject Matter Experts (SME) will not be assigned to this project except for oversight and approval and limited consulting purposes. The Department will not be involved in performing the tasks described below except as explicitly mentioned. It should be understood that the successful bidder is the State's primary resource for the activities listed in the RFP. This means the successful bidder must bring all SME resources for successful completion of all design, development and implementation of the IME.**

- **Explain your role in developing and coordinating the individual components and contractors into the cohesive entity known as the IME.**

Skill sets include **extensive Medicaid Program experience and strong project management skills** to review, assemble, and monitor the multiple work plans from each IME contractor and DHS, along with the independent verification and validation (IV&V) facet into a Master Work Plan (MWP). IV&V of the proposed compilation of services and systems is also a major requirement of this contract. Interested bidders will need to refer to the IME RFP released in December on the Department's website (www.dhs.state.ia.us) or request a softcopy of the RFP from the Department, to understand the full scope of management responsibilities of the Implementation and Support Services contractor. Bidders with previous IV&V experience in a Medicaid Enterprise such as that contemplated in Iowa will be favored.

- **Tell us how you use the Medicaid Program policy expertise in the IV&V process.**

The Implementation and Support Services contractor will oversee the transfer of the existing Medicaid Management Information System (MMIS) from a legacy system of the current Medicaid Fiscal Agent Contractor (ACS) to Iowa's State Data Center (SDC). A data warehouse will also be built on the SDC hardware. Subject Matter Experts (SME) in the management of Information Technology (IT) projects with the proven ability to oversee and to complete projects on time are crucial to the success of the Iowa Medicaid Enterprise project.

The current MMIS has embedded in the system the Iowa Medicaid business rules. Activities of this contract require the Contractor to bring SMEs that will read the code of the current MMIS and document the business rules. The skills required to review the rules with DHS staff **and document any discrepancies** will require the talents of SMEs with extensive experience in Medicaid **Program policy** and the ability to facilitate the type of communications with **DHS Medicaid policy staff** that will successfully **communicate** any differences in the current MMIS with current Iowa Medicaid policy exist. The contractor will **identify and document any identified differences before review with policy staff.**

- **Explain how you will integrate your Medicaid policy expertise with your analysis of the MMIS business rules.**

The development of a workflow process management system to include all the components of the new IME with an emphasis on quality and efficiency will require the skills of SMEs that are familiar with healthcare insurance operations, **Medicaid Program policies** and successful workflow design. It will be critical that an optimal workflow process is designed to successfully incorporate all IME contractors and the Department's Medicaid staff into a cohesive, efficient, seamless operation. **To do this the contractor will draw upon their Medicaid Program experience and their healthcare operations experience** to develop a system within the workflow design to easily monitor activities of the IME contractors as they relate to the workflow so problems can be detected and resolved.

- ***Tell us how you will integrate your Medicaid expertise and your healthcare insurance operations expertise with the workflow process management system.***
- ***Explain your approach to the requirements in the RFP as the lead in development of the workflow process management system.***

*As part of the successful melding of multiple contractors and DHS Medicaid staff to form the IME, the physical location of IME will be developed and implemented. The successful bidder will also participate in the determination of layout of the office and placement of personnel, equipment and systems, etc. and overseeing the activities associated with move and set up of the new IME. The Contractor must have the **understanding of Medicaid policies and best practices and skills to optimally structure the physical location of resources in accordance with the workflow process management developed to optimize the IME.***

- ***Explain how you will use the Medicaid expertise you bring in the development of the plan to layout the physical placement of the components of the IME.***

The concept of this project brings to the table different aspects of Medicaid expertise. It requires Medicaid Program policy and Medicaid best practices experience as well as MMIS system experience.

- ***Identify the resources and explain the application of the Medicaid Program policy experience you bring to this project.***
- ***Provide the resume of the Medicaid Program policy expert including dates, company name and project(s) of prior experience as a Medicaid Program policy expert and resumes of any new staff submitted as an amendment to your original bid proposal.***
- ***If there are any other changes in staffing from that identified in the original bid proposal, please explain.***
- ***Please update personnel references as necessary.***

Overview

In this section, we present our response to Service Requirements and discuss our Understanding, Approach, and Skills Sets associated with the “Activities Applicable to All Phases”.

***Note: The final four staffing-related bullets above are addressed in the respective areas of the Organization Information and Past Performance section.**

Understanding

FOX understands that there is a need for a balanced approach to the staffing and key activities across all phases of the project. Since the phases are defined as periods of time rather than purely by “function”, many key activities and associated staff skill sets either overlap or are dependent on other activities in order for them to be completed successfully. FOX brings together not only the technical and project management capabilities to the I&SS project, but also has included numerous staff who are subject matter experts (SMEs) in Medicaid policy, the technical application of Medicaid policy to the MMIS and the application of Medicaid policy to the business processes of the Medicaid enterprise. FOX has developed a

staffing plan that ensures that relevant skill sets are efficiently assigned to the project, while ensuring continuity and coordination in project management, MMIS testing support, IV&V, workflow development, and assurance of Medicaid policy application.

FOX understands the need for and the objectives of the defined set of Activities Applicable to All Phases. These Activities must take place for the entire duration of the I&SS project, and they are activities that focus on planning, tracking, monitoring and other management-related tasks that ensure the project gets off to a good start and continues to use sound management principles including:

- Establishment of project management processes
- Establish project Knowledge Management infrastructure through an Electronic Project Library
- Work plan management
- Risk management and proactive problem identification
- Business rule knowledge transfer
- Issue management
- IME contractor performance monitoring
- Planning
- Assessment of key project deliverables

In addition to the key project management activities that are essential to the support of a large multifaceted and interconnected project such as the IME implementation, FOX understands that our people and the skill sets they bring to the project are essential in providing crucial Medicaid Subject Matter Expertise, since the expertise needed to support the State responsibilities in each of the IME components exceeds the available State Subject Matter Experts (SME) who are also continuing to support ongoing operations during the one year of the IME implementation. FOX Medicaid policy, MMIS, and large scale healthcare operations expertise is essential to the implementation of the IME in the following key areas:

- **Identifying and validating business rules**
- **Communicating variances in program logic and current policy**
- **Offering suggestions to strengthen policy where it is found to be open to interpretation**
- **Reviewing purpose, format and content of each component contractor deliverable**
- **Establishing workflow processes that ensure compliance with Medicaid policy**
- **Assisting DHS staff in transition to a new way of doing business in the IME**

FOX understands that the I&SS Project Team will wear many hats. We must balance between project management, independent verification and validation, and subject matter expertise. Since many of our staff have multiple qualifications and skills sets, they will be assigned to more than one phase of work. Other staff with more specialized skills may be needed only for a single phase. Wherever possible based on staff skill sets, we will try to

maximize continuity of personnel across phases. The guiding principle is that we must always act in the best interests of DHS regardless of the role we are playing.

Our proposed approach ~~must~~ includes **effective use of FOX skill sets and** processes applicable to all phases of the project to ensure comprehensiveness and also include processes where the applied criteria and standards can be made specific to the project Phase and task at hand.

Approach

Role in Developing & Coordinating the Individual IME Component Contractors

FOX understands and acknowledges the importance of the role that the I&SS contractor must play in developing and coordinating the work of individual IME component contractors. This role must ensure that all points of coordination, either between individual contractors or to the IME as a whole, are identified and formally introduced into the Master Work Plan (MWP). Then the MWP must be tracked so that all key “dependent” milestones are achieved so that delays by one contractor or the State do not create delays in work elsewhere in the project.

Once our work is initiated, we expect to discuss and review the proposed work plans of each IME component contractor. Discussions are necessary to ensure that we fully understand the expectations of each IME component vendor in relation to interfaces and workflow from the State or other vendors. We will integrate these tasks and schedules into a draft MWP and identify the dependencies between them.

Using Microsoft Project software, we will analyze the draft MWP to confirm that the proposed tasks and dates of each IME component contractor will allow the overall project to be completed within the required timeframes. If problems are identified, FOX will suggest changes to individual work plan components that will allow for a satisfactory overall completion date. If necessary, FOX will negotiate in DHS’ behalf with the involved IME component contractor to achieve consensus on how critical, interdependent tasks can be accelerated to maintain overall project schedules.

Once a satisfactory MWP has been achieved, we will “baseline” the project plan and develop the automated links to the individual IME component contractor workplans so that individual workplan changes will automatically be reflected and reported in the baselined MWP. We expect to have discussions with DHS about the merits of various approaches concerning the specific mechanics as to the “who” and “how” for this process.

The baselined MWP will be monitored regularly by our PMO to identify potential problems. The review cycle will correspond to the agreed upon cycle for workplan update by all parties. We will immediately advise DHS of any adverse changes in critical, dependent task status and

get in touch with the IME component vendor to advise of the problem, ask for an explanation and establish timelines for resolution.

In addition to monitoring based on workplans, we plan to take advantage of the planned IME project committee meetings to obtain verbal advance warning of problems, obtain feedback from all affected parties, and to work towards a resolution.

The FOX approach to the scope of work calls for the effective use of interdisciplinary teams of resources who will work together, yet have semi-autonomous roles in the IME project itself. We understand the value that FOX staff, many of whom have worked on the project since the Fall of 2002, bring to the implementation of the IME. We also understand how important strong, disciplined project management is to a project as complex as the IME implementation.

FOX is accustomed the workload that is expected of the contractor, to maximize the efficient use of DHS's limited SME resources for the roles of project oversight, approval and limited consultation. We have effectively worked as a team with the DHS IME procurement team for the past 18 months. Our approach has been successful in ensuring the timeliness of activities throughout the procurement period. In preparing our response to the RFP, we carefully reviewed each of the State responsibilities in the IME RFP. We developed our revised workload estimates based on the expectation that we will shoulder responsibility for the greater part of the expected effort. We have a good working relationship already established that has been effective in working with the project team to make suggestions and recommendations on how best to achieve State responsibilities. We know that we can represent DHS interests and perform delegated tasks in a responsible manner that is based on mutual trust between DHS and FOX.

FOX Subject Matter Experts (SMEs) are key to the project management task of managing issues that arise on the project. SME staff will assist the Project Manager in reviewing newly identified issues as they are posted on the Issues Tracking database (Key Activity: 3.2.1.13) and in the proactive identification of issues as they arise (Key Activity 3.2.1.14). Our approach of using SME and Medicaid policy staff that are known to Iowa and who worked on the requirements analysis task helps ensure that we can effectively assist in the resolution of issues through the development of suggested solutions for DHS concurrence.

Use of Medicaid Program Policy Expertise in the IV&V Process

As discussed previously, FOX is proposing a Medicaid Policy and Subject Matter Expertise Team consisting of experts in Medicaid Policy and Medicaid business knowledge. The members of this team will support each of the other three (3) functional teams across all Phases of the project, which are organized around technical, business process and IV&V skill sets. In addition, each member of the proposed FOX team has extensive Medicaid and MMIS experience. The IV&V processes for this project support the primary activities of MMIS transition, Data Warehouse development and implementation deliverable review for the nine

components. Since it is likely that one or more of the contractors could be new Medicaid contractors with DHS, the IV&V team will need to be able to communicate its expectations and educate the contractors as to the Medicaid business requirements and needs that are to be supported. The FOX approach to IV&V is a proactive one where, if we seek to work together with the contractors to establish expectations up front, the quality of the assessment will become evident at the time that deliverables are provided.

Medicaid policy drives both MMIS functionality and IME business processes. Significant effort will be needed to ensure that Medicaid policy is in sync with the MMIS, MMIS enhancements, the new IME workflow, and contractor-supplied expertise. The FOX approach to IV&V is an educative approach; we view the assessment as a part of an overall process that aligns contractor work and deliverable artifacts with DHS expectations. FOX is confident that the proposed Medicaid policy staff will be able to work with the component contractors and assist them in understanding not only the “what” of each requirement but also the “why”. We have the experience and the knowledge that enables us to facilitate the understanding of contract requirements and performance expectations.

During IV&V activities, specific support from the Medicaid Policy and SME team will include:

- Ensuring that Medicaid “business terminology” is understood and used by all parties so that there is a common base of understanding concerning requirements and other needs
- Ensuring that all analysis and design deliverables incorporate business logic which is consistent with the requirements of Iowa Medicaid policy and business needs
- Ensuring that underlying system data models (e.g, data warehouse) reflect the way information is created, processed and used within Medicaid Programs
- Assisting with test planning and test result verification
- Providing a “Medicaid user” perspective in behalf of all State stakeholders so that the project is not simply technology-driven

FOX has assembled a team to support the IME implementation that has a proven record of similar Medicaid takeover activities, data warehouse development, and system / program implementation IV&V. FOX recognizes the role that the I&SS contractor must play by supplementing State SMEs and supporting the assigned DHS Project Manager. This overall approach is modeled after our current IME Systems & Professional Services procurement support contract, where FOX has proven its ability to complete critical milestones on time and with exceptional attention to quality and detail (e.g., the RFP was released on its scheduled date of December 9, 2003 and was approved by the CMS Regional Office in an unprecedented time of 11 days).

Integration of Medicaid Policy Expertise with the Analysis of the MMIS Business Rules

The members of the Technical Support Team and the Medicaid Policy and SME Team will actively support the analysis of MMIS business rules along with other staff that will “Perform Code Analysis of MMIS” (Key Activity 3.2.2.6) and “Determine if Rules are Synchronized with Policy” (Key Activity 3.2.3.5). Our approach to these tasks is explained in detail in the response to this section. Our approach is based on looking at the business rules in the MMIS from the perspective of the codified policy itself, as represented in the State Plan, Iowa regulations and in the Provider Manuals.

- Our Technical Support Team and our Medicaid Policy and SME staff will be involved in the early phases of the analysis, beginning with the development of the Code Analysis project plan that is due within 14 days of the commencement of work on the project.
- Our Technical Support Team and our Medicaid Policy and SME staff will develop the cross reference that ties the codified Medicaid policy with the relevant MMIS system elements that support the policy.
- Our Medicaid Policy and SME staff will also develop a format for the deliverable that is designed to facilitate the identification and documentation of discrepancies that are identified in the analysis.

This approach ensures that the deliverable will be developed in a format that is understandable by non-technical DHS staff, and in turn, this will facilitate the possible adoption of this document as a companion document to the MMIS technical documentation that can be used to facilitate the impact assessment of changes to the MMIS that are the result of federal, legislative, or DHS initiated policy changes.

Our Medicaid Policy and SME Team will review relevant portions of the Iowa Medicaid State Plan, policy manuals, provider manuals and other documents, which “in total” represent the formal and informal body of knowledge that defines Medicaid policy in Iowa. We will familiarize ourselves further with those documents, so we have a baseline against which to compare analysis results from this activity.

In the Code Analysis Project Plan, FOX will define how we will also use Medicaid Policy and SME staff to take the lead in the “Determine if Rules are Synchronized with Policy” (Key Activity 3.2.3.5). This review activity, using the approved analysis of the MMIS code, is facilitated by SME staff who have been involved in the code analysis and the development of the approved deliverable. Our Technical Support Team and our Medicaid Policy and SME Team will review the extracted business rules and assess whether they appear consistent with our understanding of Iowa and national Medicaid policies and procedures. If they are inconsistent, we will verify that the extraction process was performed properly. We will also flag incomplete and missing policies that should have been imbedded within the MMIS.

Integration of Medicaid and Healthcare Insurance Operations Expertise with the Workflow Process Management System

FOX uses a key component of our standard methodology known as the “FOX Straw Man Model” to graphically organize and define Medicaid Enterprise business processes. This model has been used by FOX in numerous recent MMIS requirements projects to define business activities, determine the requirements for MMIS support of these activities and establish the relationships and dependencies across and between business activities.

This model was used in the fall of 2002 for the Requirements Analysis task as a part of the MMIS procurement project. FOX defined each Iowa Medicaid activity in the Joint Application Design (JAD) sessions with DHS. FOX used Medicaid policy SME staff, including ones assigned to the I&SS project as the key participants in the JAD sessions and the development of the documentation from those sessions.

The documentation from this initial assessment will be used by the FOX Business Activities and Monitoring team and the Medicaid Policy and SME staff to develop the second level configuration of the IME Business Process model, a logical design that ties IME enterprises to their MMIS components and to the component contractor responsibilities. Through the link between the MMIS system components supporting each business activity, each business activity is also tied to the Medicaid policy that supports the business function. FOX Medicaid policy SME staff will be involved in this phase of the logical business process model.

Using process and workflow modeling software packages such as CaseWise or Visio Professional, our team will develop charts and diagrams that will identify and document the dependencies between the business processes performed by each IME component contractor. This will include identification of system interface requirements such as:

- Sending/receiving party(ies)
- Triggering events
- Frequency and volumes
- Data media, content and format
- Transmission protocols
- Validation rules
- Performance requirements
- Other handling requirements

In the third level of definition of the business model, the requirements that are developed from the “Create Contract and Monitoring System” activity (Key Activity 3.2.2.9) and the “Develop Operational Phase Performance Measures” activity (Key Activity 3.2.2.13) will be

applied to the logical model to ensure that all activities, including monitoring activities, are considered in the development of the logical design.

In Phase 2, after the contractor and Workflow Process Management system has been selected, the FOX Business Activity and Monitoring Team will be supplemented by the Medicaid Policy and SME staff in the finalization of the business process model and workflow design by the Core MMIS contractor. We will work with the component and Core contractors to make sure they fully understand the workflows amongst themselves and with the State.

Approach as Lead Developer of the Workflow Process Management System

FOX will use a special team, the Business Activities and Monitoring (BAM) Team, to focus on the development of the workflow process management system capabilities that are defined to be the key process backbone for the IME. Our approach is derivative, in that it builds on the preliminary Requirements Analysis work performed by FOX in the Fall of 2002 and any relevant additional activities discussed above. This set of facilitated meetings were the basis for the definition of the requirements that became the IME and the RFP.

The BAM team, working with the Medicaid policy SME staff, will use a process decomposition technique to develop succeeding logical models of the IME business activities.

LEVEL	DESCRIPTION	RESPONSIBILITY
Level One	Refine the Strawman model used in JAD to reflect current IME business activities	BAM Team Medicaid Policy and SMEs
Level Two	Define the IME model to reflect the responsibilities of the IME contractors and define all external interfaces	BAM Team Medicaid Policy and SMEs
Level Three	Add the additional level of detail to show interactions across IME components; add performance monitoring details	BAM Team Medicaid Policy and SMEs
Level Four	Complete model ready for export to Core MMIS contractor; Define testing requirements	BAM Team Medicaid Policy and SMEs Core MMIS Contractor

Once the workflow engine proposed by the Core MMIS Contractor has been finalized, we will bring on a specialist with expert knowledge of that specific software to work with the Core MMIS Contractor and our own team.

Use of Medicaid Expertise in Plan Development for Physical Layout of IME Component Contractors

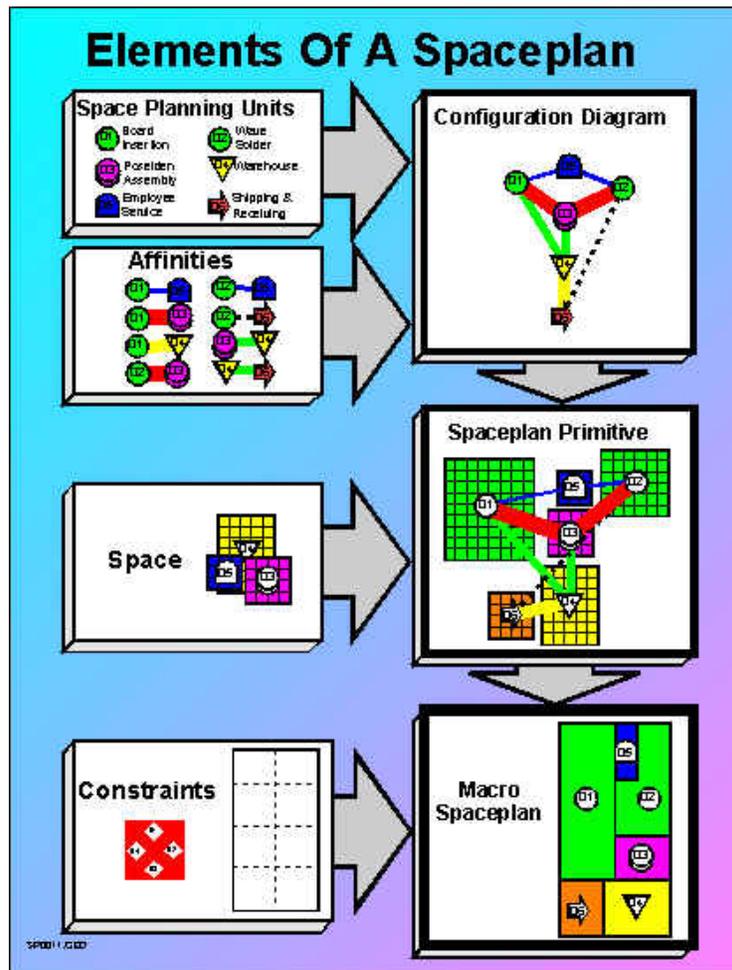
FOX's approach to the development of the facility plan and structure is based on a number of elements that will be considered by the Business Activities and Monitoring team. Since the development of the physical plant is dependent on the interactions between the business areas, Medicaid expertise is essential in understanding the unique requirements for physical space allocation and proximity location.

Each vendor has been required to identify their space needs and facility requirements in their response to the IME RFP. FOX will review the space requirements and staffing expectations in order to consider the reasonableness of the space allocations for each component. FOX has familiarity with a number of best practices from other states that have recently implemented a paperless office environment similar to the one proposed for the IME. From each of these identified states we will review physical configurations and obtain comments that enable us to develop a draft facility plan for review by DHS and each component contractor.

As discussed previously, we will be modeling the future Iowa IME workflow. Our plans for facility design will take into account the four basic factors for facilities planning:

- **Functions**
- **Affinities**
- **Space**
- **Constraints**

We will work with the Department and other State resource to develop a physical plan which represents the most efficient approach to housing IME state and contractor staff and operations based on our understanding of Iowa Medicaid business processes and best practices nationally. Accounting for the above, we will collaborate with State facilities planners to develop physical layouts such as the example depicted below:



This draft plan will be used by the BAM team to hold a number of facilitated review sessions with representatives of the component contractors to identify possible changes in the facility design. Each comment that is received will be entered into the Issues Log for tracking and resolution. After identified issues are resolved or addressed, a second draft of the facility plan will be produced, reviewed and issue tracked for resolution. Any open issues that cannot be resolved by the BAM team and by the Project Manager through the Issue Log process will be provided to DHS in the form of a decision memo for final resolution.

Project Management Approach

As described above, FOX will deploy robust and proven methodologies and automated supporting tools to achieve the required project objectives. Our approach includes adherence to the following methodologies, tools, and standards for the Activities Applicable to All Phases:

Methodologies

PMI/PMBOK – industry leading project management methodology

PMI/PMBOK

The Project Management Institute (PMI) is the acknowledged national leader for project management standards. PMI has developed the Project Management Body of Knowledge (PMBOK)®, which incorporates its standards into a manual format. FOX Systems has adapted the principles of PMBOK® as the basis for our own project management methodology subject to any modifications which may be needed to comply with our client’s standards.

PMBOK® includes nine major “areas” within the overall project management process, and each area has several components as illustrated below:

- ***Project Integration Management*** – those processes that ensure that all elements of the project are properly coordinated through the development of a project plan, execution of the plan, and accounting for the impact of changes to the plan. This includes the following elements:
 - Project Plan Development
 - Project Plan Execution
 - Integrated Change Control
- ***Project Scope Management*** – the processes associated with ensuring that the project does not grow beyond authorized boundaries and budgets by defining, managing to, and controlling changes in project mandates. This includes the following elements:
 - Initiation
 - Scope Planning
 - Scope Definition
 - Scope Verification
 - Scope Change Control
- ***Project Time Management*** – the processes that ensure timely completion of the project by establishing agreed upon tasks, durations, and start and end dates, and monitoring status. This includes the following elements:
 - Activity Definition
 - Activity Sequencing

- Activity Duration Estimates
- Schedule Development
- Schedule Control

- ***Project Cost Control*** – those processes associated with ensuring that the costs of the budget stay within the approved budget through development of an agreed upon budget, cost allocation and tracking, and monitoring against the budget. This includes the following elements:
 - Resource Planning
 - Cost Estimating
 - Cost Budgeting
 - Cost Control

- ***Project Quality Management*** – the function of ensuring that the project results are appropriate (i.e., the objectives were met). This function is performed by developing, implementing, and maintaining processes that ensure quality. Such processes include the following elements:
 - Quality Planning
 - Quality Assurance
 - Quality Control

- ***Project Human Resource Management*** – includes processes needed to effectively utilize project staff resources through planning, recruiting and team development activities. This includes the following elements:
 - Organizational Planning
 - Staff Acquisition
 - Team Development

- ***Project Communications Management*** – involves processes for the development distribution, storage and disposition of project information to project stakeholders. This includes the following elements
 - Communications Planning
 - Information Distribution
 - Performance Reporting
 - Administrative Closure

- ***Project Risk Management*** – this area involves processes that identify, assess, and monitor quantitative (e.g., numerical analysis) and qualitative risks (e.g., subjective analysis of non-numerical data) to the project and plans for risk remediation should any of those risks occur.
 - Risk Management Planning

- Risk Identification
 - Qualitative Risk Analysis
 - Quantitative Risk Analysis
 - Risk Response Planning
 - Risk Monitoring and Control
- ***Project Procurement Management*** – relates to methods for procuring services or products external to the organization that are needed to complete the project.
 - Procurement Planning
 - Solicitation Planning
 - Solicitation
 - Source Selection
 - Contract Administration
 - Contract Closeout

We propose to utilize these standards not only to manage the activities of FOX project personnel and contractual responsibilities under the FOX contract, but also to apply them when we are evaluating the practices and plans of the IME Systems and Professional Services contractors. We have already incorporated these standards into many of the templates and processes that are presented in subsequent sections of this response.

As with all other methodologies and tools proposed by FOX, our intent is to discuss each with DHS and make determinations of whether or not PMBOK® elements should be rigidly applied to segments of this project, used with modifications to reflect State requirements, or whether another approach altogether should be used.

Skill Sets

The following table describes the skill sets required for Section 3.2.1. Skill sets have been attributed to the entire proposed FOX team.

Table 11: All Phases Skill Sets Matrix

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrtrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
ALL PHASES SKILL SET																			
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				
Proven ability to develop data warehouses or decision support systems									X		X		X		X				





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

ALL PHASES SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Key Activity: Review Project Deliverables (RFP 3.2.1.15)

Contractor Responsibilities:

- Perform reviews that will assure the State receives quality deliverables from both State staff and contractors while achieving all critical project goals and deadlines
- Must use deliverable acceptance criteria and forms as approved by the Department for all deliverable reviews
- Evaluate documentation
- Conduct interviews
- Perform modeling where appropriate
- Utilize other techniques generally used in an IV&V of a software modification effort

Deliverables:

- Deliverable Reviews with content and format approved by the Department
- Recommendation as to whether deliverables should be accepted by the Department as received or returned for modifications

Performance Measures:

- Deliverable reviews shall be received by the Department's Project Director or designee within 24 hours of scheduled delivery by the Contractor as detailed in the MWP with assessment content and format approved by the Department

Detailed Understanding, Approach, and Skill Set

The FOX Team will review all deliverables to ensure that they are in compliance with the accepted format and content as developed by State staff and each component contractor. The review of deliverables begins with the development of an agreed upon document structure that supports the purpose of the document in the project lifecycle.

FOX employs a thorough process for the review of project deliverables, and has developed a proven deliverable review methodology based on the successful completion of dozens of QA and IV&V projects. Our methodology is based on adherence to industry standard methodologies including the Capability Maturity Model (CMM) and Industrial Electrical and Electronic Engineers (IEEE) 1012-1998 standards. FOX will conduct an independent assessment of component contractor deliverables and make recommendations to the State concerning acceptance or rejection of deliverables. The requirements for each deliverable have been identified in the IME RFP and are modified by each winning contractor's proposal and final contract negotiations.

Acceptance criteria for each deliverable will be based on the approved deliverable from *Key Activity: Develop Deliverable Acceptance Criteria (RFP 3.2.2.2)*, with checklists and forms as approved by DHS. FOX will review each component contractor deliverable designated by DHS for review. The approach for assessing the deliverables defined in the IME RFP is to review each reviewed deliverable for the following factors:

- *Correctness* – is each deliverable correct with respect to its methodologies, conclusions and logic?
- *Completeness* - is each deliverable complete with respect to objectives and scope?

- *Consistency* – is each deliverable internally (within the deliverable) and externally (across related deliverables) consistent?
- *Testability* – can each deliverable be independently, repeatedly verified and validated and achieve the same outcome?

FOX assessment includes a review of submitted deliverables, interviews when necessary, and cross-deliverable consistency evaluation. Modeling is another infrequently but standard technique that is used when needed, such as the evaluation of Design Support System design deliverables.

The verification and validation activity should be viewed as an ongoing, concurrent, and complementary component of the implementation effort and the quality management activities of each of the component contractors. FOX will develop a standard assessment report format for approval by DHS that will include a recommendation for acceptance or return of the deliverable to the component contractor for corrective action based on the findings in the assessment report. The reviews will be submitted to the Department within 24 hours of scheduled delivery and in content and format approved by the Department.

Examples of a FOX deliverable assessment report and a review log are included on the following pages.

***Note: Examples included in original Technical Proposal submitted March 1, 2004**

PHASE 1: APRIL 2004 – JUNE 2004 (RFP 3.2.2 AND 5.4.2)

Overview

Understanding

***Note: No changes to this section**

Approach

***Note: No changes to this section**

Skill Sets

The following table describes the skill sets required for Section 3.2.2. Skill sets have been attributed to the entire proposed FOX Team.

Table 12: Phase 1 Skill Sets Matrix

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrtrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				
Proven ability to develop data warehouses or decision support systems									X		X		X		X				





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 1 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Key Activity: Monitor Development of Data Warehouse (DW) (RFP 3.2.2.4)

Contractor Responsibilities:

- Schedule and facilitate all DW development meetings between ITE, DHS and any other contractors, including preparation and distribution of all agendas, and preparation of distribution of all minutes
- Design and implement issues database
- Update issues database daily
- Validate ITE development work plan encompasses all phases of project including testing and transition plan

Deliverables:

- Issues database
- Agendas and minutes of all scheduled meetings
- Validation of ITE plan

Performance Measures:

- Develop and deliver to the Department within 14 days of the beginning of the Contract an issues database
- Validation of ITE plan within one week of receipt of plan from ITE
- All agendas prepared and distributed at least 24 hours before scheduled meetings. All agendas should also be available in the Project Library within 24 hours
- All minutes prepared and distributed within 24 hours of completion of meetings. All minutes should also be available in the Project Library within 24 hours

Detailed Understanding, Approach, and Skill Set

FOX has considerable experience in the **development of** requirements for State Medicaid data warehouses and decision support systems based on previous **requirements or development** projects in Alaska, Georgia, Florida, New Mexico, Illinois, Michigan, and other states. In addition, we are the national leader in incorporating surveillance and utilization review system (SURS) requirements into the DW/DSS environment **based on our corporate legacy in SURS and Fraud and Abuse detection systems and programs (e.g., developing the SURS Best Practices Guide on behalf of CMS/HCFA, which was distributed nationally to SURS and Fraud and Abuse units)**. We will apply this background and understanding to the activities required to monitor the development of the new Iowa data warehouse capability and to schedule and facilitate data warehouse meetings between ITE, DHS, and the other contractors. This will include preparing and distributing agendas and minutes.

Our team includes staff (specifically Richard Becker, Frank Matina, and John Cole) with knowledge of healthcare data modeling and how to use/develop data warehouses in a Medicaid Program environment. They are qualified to assess data models and understand the implications of data models in respect to captured attributes and data relationships. This is critical in that the data model must support the types of information and analytical requests that will come from the Medicaid Programs users. Our staff understands the constraints and limitation of current MMIS technology as manifested in MARS, SURS, MSIS, claim details, inquiries and ad hoc reports. We can provide an “inside out” approach where we can look at the data model based on our knowledge of the types of information and analytics that can be expected to be requested from the data warehouse.

Although the DW/DS contractor will be expected to validate data warehouse RFP requirements with the State, our staff will be available to help interpret requirements and ensure that all State functional requirements are represented in the data warehouse design as well as any that we may recommend to the State due to our knowledge of best practices elsewhere.

As required by the RFP and to assist with all activities concerning the data warehouse, FOX will create an issues database using Microsoft Access. The issues database will have an entry screen for the entering of data warehouse design and implementation issues. If desired, the form will also allow the user to determine the criticality of the issue. The form will also allow for the categorization of issues by design, implementation, and further stratification, if needed. The form will allow for the entry of key dates, such as the date the issue was discovered, the date the issue was reported, and the expected completion date of the issue resolution. In addition to entry forms, the issues database will contain pre-developed reports, such as a report of all design or implementation issues sorted by criticality, a report of all level one critical issues sorted by category or by expected completion date. Additionally, we will have the capabilities to develop ad hoc reports.

FOX Systems believes that the tracking of issues from initiation to resolution is an essential step in the project management focus, because one of the most common problems with system implementations is that issues are identified, but the issue is never resolved or the resolution is never confirmed. Therefore, our process of updating the issues database will comprise the following:

- Update the issues database within 24 hours of receiving additional information pertaining to an issue.
- Ensure that a stakeholder and owner are identified for each issue.
- Follow up with stakeholder and owner to ensure the issue is resolved in a timely manner.
- After the issue owner resolves the issue, test the resolution and have the results evaluated by the issue stakeholder to ensure the issue was resolved satisfactorily.

Additionally, FOX will validate that the data warehouse work plan includes the key phases for the design and implementation of a data warehouse. **FOX will perform monitoring during all phases of data warehouse development and implementation starting with planning activities.** We have described some of the common phases of a data warehouse design and implementation below:

Planning Phase

The objective of the planning phase is to set the definition and scope for a data warehouse project. It documents the informational objectives of the target audience and what will be accomplished as a result of the project. The planning phase addresses business requirements with a mixture of business needs and source data realities.

The success of the data warehouse will be greatly increased by a sound understanding of the business users and their requirements. Therefore, the source system analysis and business requirement analysis undertaken in the Analysis Phase will build on information collected in the Planning Phase and will provide the basis for formulating virtually all other project deliverables.

The Planning Phase should be used as a time to prepare for all other phases by ensuring that the data warehouse project plan provides the blueprint to estimate and construct the remainder of the project.

Analysis Phase

The objective of the Analysis Phase is to develop a system design to meet the system functional requirements. In preparation for the development of the system, the detail in the analysis specifications must be expanded to a more elementary and detailed levels. Expansion of the analysis will be the focus of the project at the beginning of the Analysis Phase.

The following tasks are typically included in the Analysis Phase:

- Maintain the Project Plan
- Enhance the Detailed Requirements Document
- Construct and present a customized data warehouse Overview
- Establish a Capacity Evaluation Plan
- Develop a Data Extraction, Transformation, and Load Strategy
- Develop a Metadata Strategy
- Develop an Implementation/Installation Strategy
- Develop a Training Strategy that will address the preparation of training materials.

Design Phase

The objective of the Design Phase is to ensure that the data warehouse objectives are met. The Design Phase is concerned with designing and installing the technical environment components; completing the physical database design; designing security facilities; developing detailed specifications of how data will be extracted from the system(s) of record, processed, and loaded into the data warehouse; and specifying the user access details.

Development Phase

The objective of the Development Phase is to create the actual programs, processes and procedures that extract data from operational data sources, perform any transformations and validation processes, and load the data into the data warehouse environment.

Test Phase

The objectives of the Test Phase are to perform system integration and regression testing of the data warehouse system. This includes developing test cases, scenarios and scripts to ensure the quality of the application; verification of the usability of the tools and proper execution of all functions of the warehouse.

In this phase of the project, the major objectives are to conduct the Acceptance Testing to correct any discrepancies and problems found in the application software to satisfy the business, functional, technical, and reporting/output requirements; to complete all training and user manuals and documents; and to prepare for the Deployment Phase.

During this phase, it is necessary to execute the detailed Data Extraction, Transformation, and Population Plan in support of the Acceptance Testing.

The final version of the Deployment Plan, User Manuals, Quick Reference User Documents, Operations Manuals, and a Procedure Manuals should be completed and approved during this phase.

Deployment Phase

Deployment is the convergence of the technology, data, and user access facilities on the user's desktop along with the necessary education and support structure.

The objectives of the deployment phase are to rollout user access and to institute ongoing data warehouse support.

FOX will develop a validation document that will describe our process for validating the phases of the ITE data warehouse work plan. The document will include a description of the phases that are complete and why. The document will also include a description of the phases that are not complete, why the phases are not complete, and our suggestions for bring the work plan phases into compliance.

We will develop and deliver to the department within 14 days of the beginning of the Contract an issues database. We will deliver a validation document of ITE development work plan within one week of receiving the plan from ITE. We will also prepare and distribute all agendas at least 24 hours before the scheduled meetings and make the agendas available in the Project Library within 24 hours. We will prepare and distribute all minutes within 24 hours of the completion of meetings and make the minutes available in the Project Library within 24 hours.

Key Activity: Perform Code Analysis of MMIS (RFP 3.2.2.6)

Perform Code analysis of current MMIS system to determine system's business rules.

Contractor Responsibilities:

- Review source code of MMIS to accurately identify business rules as coded
- Develop project plan with sufficient detail, to document and verify business rules as contained in MMIS

Deliverables:

- Project plan
- Documentation identifying the current MMIS business rules

Performance Measures:

- Project plan (to be incorporated into MWP) received within 14 business days of start of contract

- *Documentation received within 7 days of completion of code analysis (as documented in MWP)*

Detailed Understanding, Approach, and Skill Set

The FOX team will perform a code analysis of the Iowa MMIS to document the business rules that are defined by the program logic in the MMIS. The technical analysis of the MMIS programs, codebooks, and tables used to support table driven edits will be evaluated using a combination of **sources**:

- Current MMIS documentation, such as the MMIS System Documentation (as in Bidders Library and maintained by ACS)
- Current MMIS system objects (including COBOL Programs listings, Copybooks and Automated Data Dictionary elements)
- Reports generated from ~~ITE or DHS provided~~ Business Rule Extraction **software** products, and other **more generalized** system ~~Utilities~~ such as FileAid.

FOX team members have a deep understanding of the design and functional organization of *Consultec*-developed MMIS, including FOX team members who have many years of technical experience with the Iowa MMIS. This experience enables us to focus on the parts of the MMIS that are most critical to this assessment.

FOX will develop an MMIS Code Analysis Project Plan that addresses the steps involved in the code analysis. The project plan will identify the purpose, assumptions, approach, scope and resulting deliverables from the code analysis. The specific assignment of staff to subsystems of the MMIS, based on the particular skill sets needed, will be identified in the Project Plan. FOX understands that the purpose of the code analysis activity is to:

- Assess the business rules that are currently supported by the MMIS logic that enforce Iowa Medicaid program policies.
- Document the business rules in a manner that is understandable by non technical DHS Medicaid staff.
- Obtain approval of the Code Analysis deliverable for this work activity.
- Support the review of the Business Rules for *Key Activity: Determine if Rules are Synchronized (RFP Section 3.2.2.8)*.

As the I&SS contractor, FOX will provide the Code Analysis Project Plan within 14 days of the commencement of work. This will enable the approved code analysis to be incorporated into the MWP.

FOX has in-depth experience in this type of analysis, as this is commonly a key component of the documentation of “AS IS” business requirements that is a part of the FOX methodology for system requirements definition for new systems. FOX performed a similar analysis as a part of its recent requirements definition for the Oregon Replacement MMIS Project and has employed this as an adjunct technique to both requirements definition and IV&V activities in Tennessee.

FOX will submit the code analysis deliverable, conforming to an approved format, within seven days of the completion of the code analysis effort. As is customary on FOX analytical deliverables, particularly with large complex deliverables, FOX suggests that DHS perform preliminary reviews of the deliverable as it is being developed to help ensure that the document meets DHS expectations.

FOX suggests that the format of the document be organized in a manner to support *Key Activity: Determine if Rules are Synchronized (RFP Section 3.2.2.8)*. This approach is beneficial in supporting the maintainability of the document throughout the IME Implementation period, as optionally as a permanent component of the MMIS systems documentation. FOX proposes that document be organized around the relevant sections of the Iowa State Medicaid Plan.

A proposed document structure for the MMIS Business Rules Deliverable is presented on the following page.



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

This Page Intentionally Left Blank

PHASE 2: JULY 2004 – DECEMBER 2004 (RFP 3.2.3 AND 5.4.2)

Overview

Understanding

***Note: No changes to this section**

Approach

***Note: No changes to this section**

Skill Sets

The following table describes the skill sets required for Section 3.2.3. Skill sets have been attributed to the entire proposed FOX team.

Table 13: Phase 2 Skill Sets Matrix

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrtrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				
Proven ability to develop data warehouses or decision support systems									X		X		X		X				





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 2 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Key Activity: Assess Design and Installation of Infrastructure (RFP 3.2.3.2)

Assess Design and Installation of Infrastructure – DHS anticipates developing a Web Portal to facilitate communications with its providers as part of this project.

Contractor Responsibilities:

Assess the design and installation of associated infrastructure. Assessment and design shall include, at a minimum, the following:

- *Review for capacity; new transactions and the impact on existing infrastructure*
- *Customer Service impacts; new transactions and change to provider community impacts cause increased customer services needs*

Deliverables:

- *Written assessment*

Performance Measures:

- *Submit a written assessment on the design and installation of the infrastructure to the Department's Project Director by noon of the date identified in the MWP*
- *File approved assessments to the project library within one day of receiving Department approval*

Detailed Understanding, Approach, and Skill Set

FOX understands the need to assess the design and installation of the infrastructure and has the experience and expertise to do this. We are currently working with the State of Tennessee to evaluate and test the web portal associated with Tennessee's MMIS. The Tennessee web portal includes provider functionality pertaining to Global messages, Claims inquiry, Claims submittal and adjustment, Provider Profile, Eligibility Verification, Remittance Advices Payment Inquiry, Preadmission Evaluation, Upload and download HIPAA compliant file transaction, Download providers information change request form, and View/Reply/Delete message.

Based on this ~~experience~~ review and other experience with State Medicaid agencies, we have developed a methodology for reviewing web portal design and installation. This methodology includes the following:

- *Review Staff Needs* – The key purpose of implementing a provider communications web portal is to increase the efficiency of staff. Therefore, it is crucial that an organization assessing the design of a web portal review the functions being performed by provider relations staff. For example, if provider relations staff are constantly answering questions from providers pertaining to new claims processing rules, it would be important to create an alert when the provider logs on that notifies the provider of any claims processing changes. The State may also want to develop different user IDs for a provider's staff, so that content specific to the user's job function will be displayed.
- *Review Provider Needs* – This may be the most important step in the methodology, because a web portal is conceived with intent of targeting the needs of the user. Therefore, we will help the State work with the provide community to understand the type of information they want to see on a Provider communication web portal.

- ***Review Proposed Web Architecture and Technology*** – Based on the information needs identified in the first two steps, we will assess the appropriateness of the proposed Web architecture and technology to ensure that it will meet the functionality, response, scalability, maintainability and security requirements of the IME.
- ***Develop Design Documentation*** – Once the needs of the stakeholders are assessed and documented, the design of the web portal must be created and documented. The stakeholders to review the web portal design will use this documentation. FOX will also review this documentation to ensure that the design of the web portal meets the needs of the stakeholders.
- ***Infrastructure Assessment*** – FOX will work with DHS to assess the current infrastructure and determine the needs of DHS. This determination will be based on a development of expected capacity needs, the number of transactions, the number of expected users of the web portal, and the type of functions and transactions that will be performed via the web portal.

Our proposed Project Manager and other team members have recent experience with Web-portal systems that will be applied to this activity. FOX will submit a written assessment of the design and installation of the infrastructure to the Department's Project Director by noon of the date identified in the MWP and file the approved assessment in the project library within 24 hours of approval.

Key Activity: Assess Application Software (RFP 3.2.3.3)

Contractor Responsibilities:

Assess all application software developed or modified as part of this project. Assessment of application software, at a minimum, shall include:

- *Code completeness, accuracy, effectiveness and efficiency*
- *Code supportability*
- *Adequacy of unit level and integrated test planning and conduct*
- *Monitor/evaluate deficiency reports*
- *Adequacy of interface handling*
- *Reuse effectiveness*
- *Effectiveness of data handling*

Deliverables:

- *Written assessments*

Performance Measures:

- *Submit written assessments to the Department's Project Director or designee on time and intervals as defined in the MWP*
- *File approved assessments to the project library within one day of receiving Department approval*

Detailed Understanding, Approach, and Skill Set

The FOX Team will assess the application software for each component delivered as part of the IME Implementation as scheduled in the MWP. **The reviews will be performed by FOX staff**

who have both hands-on working knowledge of the application language and Iowa Medicaid business requirements and teams of technical staff working side-by-side with business analysts.

These assessments will evaluate each component and their associated sub-components as needed. Numerous areas will be reviewed in these assessments, such as code accuracy, completeness, effectiveness and efficiency. Other items that will be considered in the reviews based on FOX team methodology and toolkit would be code reuse, ease of modifications to code, organization of code, flexibility in code design, error handling routines, interface handling, internal documentation, consistency, standards, run time logging, and design considerations. These assessments would be delivered in a report and include a summary in the form of the checklist, which has been developed as part of the FOX methodology for quality assurance activities:

Table 14: Sample Application Assessment Review Checklist

Project Name:		
Project Number:		
Prepared By:		Date:
Item	Yes/No	Comments
Change Control and Source Code Management		
Code Accuracy		
Code Completeness		
Code Consistency		
Code Reuse		
Code Standards		
Code Supportability and Maintenance		
Data Storage Requirements and Handling		
Design Considerations		
Error Handling/Messages/Correction/Recovery		
Integration Testing/Results/Deficiency Analysis		
Interface Handling		
Internal Documentation including Data Model and File Formats		
Performance Analysis		
Report Analysis		
Requirement and Business Rule Analysis		
Run Time Logging		
Screen/GUI Checklist/On-line Help		



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

Project Name:		
Project Number:		
Prepared By:		Date:
Item	Yes/No	Comments
Unit Testing/Results/Deficiency Analysis		
User and Operational Manual Review		
User Navigation		
Approved By:		Date:

The above report is provided as a sample of a checklist, and the items are subject to change depending on the objectives, approach and resources addressing this task. FOX recommends that this checklist would be included in a report to the IME Project Manager on a periodic basis to identify potential problems or issues needing to be addressed. Assessment reports will be filed to the project library within one day of receiving Department approval.

Based on FOX experience, we strongly advocate that this quality management be built into the project from the very beginning and not as an inspection process in later stages. Because of the best of breed approach, there will be numerous styles, methodologies, approaches, etc to the software development processes. Early involvement will assist in avoiding delivery of a product that does not meet the acceptable standards and expectations of the State and therefore putting the entire project at risk.

Key Activity: Determine if Rules are Synchronized with Policy (RFP 3.2.3.5)

With DHS staff, determine if business rules are synchronized with Iowa Medicaid policy (RFP 3.2.3.5)

Contractor Responsibilities:

- Identify appropriate Medicaid staff to interview
- Document all differences between coded system policy and Medicaid policy as defined by Medicaid policy staff
- Conduct interviews with individual Medicaid policy staff if needed to determine differences

Deliverables:

- Written report identifying any discrepancies between Iowa Medicaid policy and the MMIS defined business rules

Performance Measures:

- Within 14 days of completion of interviews and meetings related to determining differences, submit to the Department, a report identifying any discrepancies between Iowa Medicaid policy and the MMIS defined business rules

Detailed Understanding, Approach, and Skill Set

The FOX team will use a proven structured review methodology to work with DHS staff to assess the documented MMIS business rules with the current Iowa Medicaid Program policies. **As has been described, the FOX Medicaid Policy and Subject Matter Expert (SME) Team will be**

heavily involved with this activity. The FOX approach is driven by the completion and approval of the MMIS Business Rules Deliverable. The FOX team has organized this deliverable around the relevant sections of the Iowa State Plan. This approach has a number of benefits:

- Identification of appropriate staff is simplified by identifying the individuals responsible for medical program development for each covered service in the State plan and for other individuals who are included in the review and formulation of changes in the State plan.
- The accountability for business rules in the MMIS is strengthened by the direct correlation between the Business Rules and the State Plan.
- Differences between the documented MMIS Business Rules and Iowa Medicaid policy are linked, thus facilitating the development of change requests or policy development to implement corrective actions.
- The FOX approach to the review of the business rules uses a modified structured approach that is based on the FOX Joint Application Design (JAD) approach that was used successfully in the development of requirements for the Iowa IME RFP. The approach is based on the following key factors:
 - Participants are identified early, and requests for meetings are planned well in advance.
 - Participants are informed of the process and their role is defined prior to the meeting
 - Agendas are developed for each meeting and notes are taken from each meeting, identifying any action items, issues, or parking lot items.
 - Minutes are reviewed with participants before the deliverable is developed.

After the review meetings are completed, a report will be developed to document variances between MMIS Business Rules and Iowa Medicaid Policy. FOX will perform a criticality analysis of identified discrepancies to assist DHS in developing an approach to corrective action and to establish the priority for resolution of the variances.

Our experience in this type of synchronization review with other state Medicaid programs has shown that the review will not only identify deficiencies in the MMIS business logic, but will also identify areas where program policy can be developed more thoroughly to improve program administration.

The FOX Team will develop the Report of Discrepancies between Iowa Medicaid Policy and the MMIS Business Rules, based on the format and content to be defined and approved in the Code Analysis Project Plan to be submitted as in *Key Activity: Perform Code Analysis of MMIS (RFP 3.2.2.7.)* This will be submitted to the Department within 14 days of completion of the interviews and meetings required for determining the discrepancies.

PHASE 3: JANUARY 2005 – JUNE 2005 (RFP 3.2.4 AND 5.4.2)

Overview

Understanding

***Note: No changes to this section**

Approach

***Note: No changes to this section**

Skill Sets

The following table describes the skill sets required for Section 3.2.4. Skill sets have been attributed to the entire proposed FOX Team.

Table 15: Phase 3 Skill Sets Matrix

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrtrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				
Proven ability to develop data warehouses or decision support systems									X		X		X		X				





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 3 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Key Activity: Implement WPM Design and Reporting (RFP 3.2.4.1)

Implements Workflow Process Management design and reporting.

Contractor Responsibilities:

- *Upon completion of design and testing of WPM coordinate and implement process including reporting system*
- *Monitor to assure accuracy of conversion to production*
- *Once in production monitor for inconsistencies or errors*
- *Validate reports are accurate and functioning correctly*

Deliverables:

- *Weekly reports*

Performance Measures:

- *Submit weekly reports (content and format to be approved by the Department) no later than noon each Monday for the preceding week's activities to the Department's Project Director or designee*
- *File all approved reports to the project library within 1 day of approval by the Department*

Detailed Understanding, Approach, and Skill Set

This activity follows from the previous tasks 3.2.2.11 *Analyze and Validate MMIS WPM Software* and 3.2.3.1 *Coordinate Workflow Process Management*. FOX knows that a smooth, accurate, effective implementation of the WPM system is vital to keeping the overall implementation of the IME on track and on schedule. Our experience in managing workflow processes in State Medicaid environments (e.g., Alaska MMIS) and Practice Management Systems, among others, will support our work in this effort.

Once the design and testing of the WPM system has been completed, the FOX Team will begin coordinating the system's conversion to production. The FOX Team will work closely with all contractors and Department staff to ensure that they can access and utilize the system as designed. In addition, access to the system by authorized parties will be reviewed and monitored to verify that the security capabilities of the system are effective and have been accurately implemented.

The various processes of the WPM system will be monitored via database query, review of reports for process indicators, and interviews with component contractor managers to verify that assignments are being received, that scheduling algorithms are working as expected, and that the ability to manually specify or reassign work is functional. In addition, the tracking and prioritizations capabilities of the WPM will be scrutinized for accuracy.

The WPM system database will initially be queried to verify the accuracy of the conversion and periodically thereafter to monitor for possible database content issues (e.g., accuracy of data stamps, correct identification of individuals performing activities, accuracy of scheduling for automatic notifications). All workflow management and performance standard reports that are part of the WPM system design will also undergo an initial examination for accuracy and will subsequently be reviewed on a scheduled basis. The frequency of the ongoing reviews of system and report content during the implementation phase will be determined in conjunction with the Department staff.

The FOX Project Manager, **with support from the Workflow Architect and BAM analysts**, will be responsible for producing weekly reports describing the status of the WPM system implementation, activities undertaken during the week, any issues that need to be addressed, the resolution of previously outstanding issues, and the projected activities for the following week. Refer to Section 3.2.1.11 for examples of project status reporting for all phases and activities.

The weekly reports will be submitted to the Department's Project Director or designee no later than noon each Monday or according to the schedule outlined in the RFP requirement. It will be added to the project library within one day of receipt from the Department of approval of the report.



*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

This Page Intentionally Left Blank

PHASE 4: JULY 2005 – MARCH 2006 (RFP 3.2.5 AND 5.4.2)

Overview

Understanding

***Note: No changes to this section**

Approach

***Note: No changes to this section**

Skill Sets

The following table describes the skill sets required for Section 3.2.5. Skill sets have been attributed to the entire proposed FOX Team.

Table 16: Phase 4 Skill Set Matrix

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrtrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Project Management Skill Set																			
Ability to define requirements, roles and responsibilities and instill a positive outlook	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X			
Ability to develop new organizations structures and reporting capabilities	X	X	X	X	X	X	X	X		X		X	X		X	X			
Ability to Identify and Manage Risks	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Ability to manage project scope and costs	X	X	X	X	X	X	X	X					X		X				
Experience in consensus building and motivation	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Experience in effectively communicating with business partners to solve problems and issues	X	X	X	X	X	X	X	X	X	X	X	X	X		X				
Previous contract administration experience with large scale Medicaid contracts	X	X		X	X	X				X		X							
Previous contract administration experience with performance based Medicaid contracts	X	X		X	X	X						X							
Previous experience in developing and managing a communications strategy	X	X	X	X	X	X		X		X	X					X			
Previous experience in managing human resources including policy and procedures	X	X		X	X	X	X	X		X	X	X							
Previous experience in managing IV&V projects or work teams	X	X			X	X			X	X	X	X	X		X				



DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Previous experience in working with CMS in certification or performance assessment	X	X	X			X		X	X	X		X							
Previous management experience in managing large scale Medicaid contracts	X	X			X	X		X		X		X				X			
Previous project management experience in large scale Medicaid organizations with numerous contractors	X	X			X	X				X					X				
Proven ability to establish deadlines, action items	X	X				X	X		X	X	X	X	X		X				
Technical experience in using Microsoft Project to manage large scale projects		X				X	X		X		X		X		X				X
Medicaid Policy SME Skill Set																			
Ability to facilitate the type of communications with policy staff that will successfully identify variances between policy and technical definitions.	X	X	X	X	X	X		X				X		X		X			X
Understanding of Iowa Medicaid Policy	X	X	X	X			X	X				X		X		X			X
Understanding of Medicaid eligibility	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X		X
Understanding of Medicaid home and community based waivers	X	X	X	X			X	X	X	X	X	X		X		X			X
Understanding of Medicaid hospital and medical payment methodologies	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of Medicaid long term care authorization and processing	X	X	X	X		X	X	X	X	X	X	X		X		X			X
Understanding of Medicaid managed care and MMIS processing requirements	X	X	X	X		X	X	X	X	X	X	X		X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrkichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of Medicaid spenddown	X	X	X	X			X	X	X	X	X	X	X	X		X			X
Medicaid Operations SME Skill Set																			
Previous experience in Medicaid back office operations, including mailroom processing and financial management	X	X	X		X			X		X				X		X			X
Previous experience in managing Medicaid provider and/or member services civilities	X		X	X	X			X			X					X			
Previous experience in Medicaid transition activities	X	X			X	X		X	X	X	X	X		X		X			X
Previous experience with structuring physical location of resources in accordance with the workflow process management										X						X	X		
Previous management experience in large scale Medicaid enterprise implementations	X	X			X	X			X	X						X			
Proven ability to manage and monitor large scale complex claims processing operations	X	X											X						
Understanding of automated voice response systems	X	X	X	X	X	X		X	X	X	X		X		X	X	X		
Understanding of call centers and computer supported telephony	X	X	X	X		X		X							X				
Understanding of clearinghouse processes	X	X	X	X				X	X	X	X		X			X			X
Understanding of healthcare insurance operations and successful workflow design	X	X	X	X		X	X	X	X	X	X	X		X		X	X		X
Understanding of Iowa Medicaid Operations	X	X	X	X			X	X						X		X			X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of workflow development and process engineering	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Previous experience in the development and measurement of operational metrics and monitoring systems	X	X	X		X	X		X	X	X		X			X	X	X		
Proven ability to assess and document Medicaid business processes	X	X	X		X		X	X		X	X	X				X			X
Proven ability to assess operation issues within a large scale transaction processing environment	X	X	X	X	X	X		X	X	X		X	X	X	X	X			X
Technical Analysis Skill Set																			
Expertise in large scale COBOL/VSAM/CICS systems	X	X	X	X	X	X			X				X	X		X			X
Expertise in MMIS data reporting	X	X	X	X	X			X				X	X		X				
Expertise in MMIS programming (COBOL)	X	X				X			X				X	X		X			X
Expertise in MMIS system design	X	X	X		X			X	X	X		X		X	X	X			X
Expertise in MMIS system operations	X	X			X	X			X				X	X					X
Previous IV&V experience in testing MMIS	X	X			X			X	X	X		X							X
Proven ability to read and understand structured programs and ability to develop user friendly documentation	X	X				X			X	X	X	X	X	X	X				X
Proven ability to develop and implement new technology, such as plastic ID cards and automated eligibility verification					X	X							X		X				
Proven ability to develop data warehouses or decision support systems									X		X		X		X				





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Proven ability to develop data extraction transformation and load utilities		X		X					X	X	X		X		X				
Technical experience in data modeling		X		X					X						X				
Technical experience in developing and modifying Job Control Language to support production						X			X				X	X					X
Technical experience in modifying and testing MMIS systems		X							X			X	X	X					X
Technical experience in resolving problems and support of MMIS systems	X		X		X				X			X	X	X					X
Technical experience in working with transfer and implementation of MMIS systems	X	X			X				X			X	X	X		X			X
Technical experience with Consultec designed Iowa MMIS systems					X									X					X
Technical experience with Consultec designed MMIS systems	X	X	X		X	X			X	X			X	X	X				X
Technical experience with current commercial large scale data base management systems						X			X		X		X	X	X				
Technical experience with Iowa MMIS claims processing subsystems					X									X					X
Technical experience with Iowa or Consultec back end reporting systems													X	X	X				X
Technical experience with PanValet or other librarian systems						X			X				X	X					X
Technical experience with systems with integrated data dictionaries and object management components									X	X	X		X	X	X	X			X
Technical experience in developing business process models	X	X	X	X	X			X	X	X	X	X			X	X			





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Technical experience in working with systems following configuration management and change control		X	X		X	X							X		X				
Understanding of Consultec MMIS system design standards and practices	X	X	X	X				X	X	X			X	X	X				X
Understanding of decision support tools and data base design	X	X	X	X		X		X	X		X	X	X		X				X
Understanding of document imaging scanning, OCR and document management storage and retrieval	X	X	X	X		X		X			X					X			
Understanding of Pharmacy Point of Sale processing and integration with MMIS systems	X	X	X	X			X	X	X	X	X		X	X		X			X
Understanding of interface engines, integration of disparate systems, and file transfer, standards, protocols and applications	X	X	X	X		X		X	X				X	X	X				X
Understanding of web based technology to support transaction processing	X	X	X	X		X	X	X	X	X	X		X	X	X	X			X
Consulting Skill Set																			
Ability to Detect and Resolve Problems	X	X	X	X	X	X	X	X				X	X		X			X	
Ability to develop meaningful status reporting on all facets of project	X	X	X	X	X	X	X	X	X	X	X	X			X				
Ability to follow project protocols and structure to maintain project stability and schedule management	X	X	X	X	X	X	X	X	X	X		X		X	X	X	X		X
Ability to foster commitment to schedule and a team environment	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X	
Experience in managing issues using issue resolution techniques	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X
Experience in working in fast paced start up working environments	X	X	X	X	X	X	X	X	X	X	X	X		X		X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Experience in working strategically with government organizations	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X		X
Previous experience in facility design and configuration	X	X		X	X	X										X		X	
Previous experience in office design and optimal placement of personnel, equipment and systems				X		X				X						X	X	X	
Previous experience in overseeing the activities associated with move and set up of the new IME.	X	X				X		X		X						X			
Previous IV&V experience in conducting or participating in facilitated meetings to support requirements development	X	X		X	X			X	X	X	X	X							X
Previous IV&V experience in data conversion review and assessment	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing findings and presenting them to client	X	X		X	X			X	X	X		X							X
Previous IV&V experience in developing test cases to support MMIS testing	X	X			X			X	X	X		X							X
Previous IV&V experience in managing requirements	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing contractor work plans and staffing plans	X	X		X	X			X	X	X		X							X
Previous IV&V experience in reviewing MMIS design deliverables	X	X		X	X		X	X	X	X		X							X
Previous IV&V experience on a Medicaid Fiscal Agent Account implementation project	X	X			X			X	X	X	X					X			X
Previous IV&V experience on a Medicaid system implementation project	X	X			X			X	X	X	X					X			X
Proven ability to implement complex projects on time	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X		X





DEPARTMENT OF HUMAN SERVICES
STATE OF IOWA

*Desh Ahuja, Executive Vice President
FOX Systems, Inc.*

PHASE 4 SKILL SET	Susan Fox	Desh Ahuja	Kathleen Connor	Manny Mkrichian	Bill Larkin	Pearlene Ryan	Jim Elco	Bruce Weydemeyer	Frank Matina	Mary Jane Tierumniks	John Cole	Tom Walsh	Hari Chitluri	Janet Oliver	Richard Becker	Nancy Shump	Karen Perkins	Larry Bookhamer	Robin Pratt
Understanding of federal Medicaid policies and regulations	X	X	X	X		X	X	X	X	X	X	X	X	X		X			X
Understanding of HIPAA transaction and code set requirements	X	X	X	X		X	X	X	X	X	X		X	X		X	X		X
Understanding of IEEE standards for software verification and validation	X	X	X	X		X		X	X	X	X	X		X	X				X
Understanding of Iowa MMIS system modules and functionality	X	X	X	X		X	X	X						X		X			X
Understanding of MMIS system design	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X
Understanding of the system development lifecycle model	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			X



Key Activity: Optimize WPM Design and Reporting (RFP 3.2.5.1)

Optimize Workflow Process Management Design and Reporting.

Contractor Responsibilities:

- Review WPM implementation and optimize as needed
- Recommend changes to the Department
- Test changes
- Implement changes as tested

Deliverables:

- Written report on recommendation for optimization
- Written report on test results
- Written report on implementation of optimized changes

Performance Measures:

- Submit written reports on time as scheduled in the MWP to the Department's Project Director or designee

Detailed Understanding, Approach, and Skill Set

Once implemented, the WPM system and the associated communication structure for WPM will gradually replace the Master Work Plan as the core of the IME management process. The system will furnish the Department staff responsible for monitoring contractor effectiveness with the data they need to perform this task.

At this point the FOX **Workflow Architect and members of the BAM** Team will shift focus from monitoring the WPM system for accuracy to monitoring it for effectiveness. The questions asked will become:

- Does this report deliver the information needed? As opposed to does it deliver the expected information?
- Does this scheduling algorithm distribute the work to the appropriate, rather than the expected individuals?

Review of the system will be conducted using methods to monitor the system similar to those used during implementation. The schedule for these reviews will be determined in conjunction with Department staff and will be entered into the MWP, and results will be submitted to the Department's Project Director or designee as agreed to in the MWP.

When an opportunity for optimization has been identified, the FOX **Workflow Architect and the BAM** Team will prepare a written report on the opportunity that will identify, where possible, multiple options that address the issue. Associated pros, cons, and time frames will be specified, followed by a recommendation discussing which option the FOX Team deems most appropriate. The report will be submitted to the Department's Project Director or designee, and an entry will be added to the issues database describing the opportunity. This type of process has been successful for FOX on previous projects in Florida, Virginia, and California.