

**DLARA - BFS Accela Modernization Project**

Project Control Office (PCO)

**Bid # 007115B0003432**

**Advocate**

Formerly **GCR** Ltd.



October 31, 2014

## Table of Contents

Cover Letter .....	3
Resume .....	5
Reference Checks.....	6
Background Check.....	7
Permission to Work.....	8
Payment Rate.....	9
Commitment Letter .....	10

## Cover Letter

March 17, 2015

Whitnie Zuker  
Michigan Department of Technology, Management and Budget  
DTMB Purchasing Operations – Constitution Hall – 1st Floor  
W. Allegan St.  
Lansing, MI 48933

Re: Response to ITB# 007115B0003432, DLARA - BFS Accela Modernization Project

Dear Ms. Zuker,

Advocate Solutions LLC. (Formerly GCR Ltd.) is pleased to present this proposal in response to the ITB# 007115B0003432, DLARA - BFS Accela Modernization Project. This Proposal is valid for sixty days from the due date for response to the ITB. In accordance with the required response to the ITB, Advocate submits the following:

Our candidates and availability are as follows:

**Senior Business Analyst – Brian Adams** (available at project start)

The Advocate point of contact for this bid is:

[REDACTED]  
[REDACTED]  
[REDACTED]

Vendor ID number: [REDACTED]  
007115B0003432, DLARA - BFS Accela Modernization Project.

Advocate Solutions certifies that the candidate included in this bid proposal is available to start on the date indicated. Advocate has verified our candidate's permission to work in the United States and documentation will be provided upon job offer. Furthermore, Advocate agrees to all the terms in all sections of the ITB# 007115B0003432.

As you will see in the remainder of this response, Advocate is committed to bringing the absolute best and proven resources to this project.

Advocate's candidate, Brian Adams, brings extensive experience, proven practices, exceptional skills, and professionalism to this important engagement that is critical to its overall success, including:

- Previous experience working on IT projects with the State of Michigan (SOM) in departments such as Environmental Quality, Natural Resources, History, Arts, and Libraries (HAL), Agriculture & Rural Development and the Unemployment Insurance Agency.
- Extensive experience functioning as a Senior Business Analyst with expertise in creating and maintaining process maps and data flow diagrams, as well as creating and executing test plans.
- Recent experience facilitating and working with cross-functional teams to successfully complete complex, IT projects with multi-million dollar budgets, affecting thousands of users, on time and under budget.
- Experience with the Systems Engineering Methodology (SEM) and the State Unified Information Technology Environment (SUITE) methodology, as well as the required documentation associated with them.

Advocate wants to assure you that we are committed to achieving the goals established for the role. We believe that our proposal offers to the State of Michigan the best value and the highest quality professional services possible in the industry. We believe, as you read and evaluate our response to the ITB, that our proposed senior staff, experience, and processes far exceeds your requirements as well as your expectations for this effort. Advocate Solutions appreciates the opportunity to bid on this project.

Respectfully,



Partner

## Resume

The resume of the individual proposed for the **Senior Business Analyst: Brian Adams** has been submitted as a “blind” document with all company logos and identifying marks removed as requested by the SOW.

## Reference Checks

### Reference #1

<b>Reference Name</b>	John Carey
<b>Company</b>	State of Michigan DTMB
<b>Job Title</b>	Information Technology Manager
<b>Phone Number</b>	██████████
<b>Relationship</b>	Mr. Carey served as a manager on his projects with the State of Michigan DTMB and provided positive feedback. He is available for a phone call regarding the specific details.

### Reference #2

<b>Reference Name</b>	Frank Kania
<b>Company</b>	Sparrow Health System
<b>Job Title</b>	Manager Revenue Integrity
<b>Phone Number</b>	████████████████████ ██████████ 7
<b>Relationship</b>	Mr. Kania served as a manager on his projects with Sparrow Health System and provided positive feedback. He is available for a phone call regarding the specific details.

## Background Check

Background checks will be provided after award is made.

## Permission to Work

Advocate Solutions has verified our candidate's permission to work in the United States and documentation will be provided upon job offer.



## Payment Rate

Please see the sealed price proposal for rate information.

## Commitment Letter



October 27, 2014

Whitnie Zuker  
Michigan Department of Technology, Management and Budget  
DTMB Purchasing Operations – Constitution Hall – 1st Floor  
W. Allegan St.  
Lansing, MI 48933

Re: Commitment to ITB# Bid Number 007115B0003432, DLARA - BFS Accela Modernization Project (Sr. BA)

Dear Ms. Zuker:

This letter is to confirm that I am committed exclusively to Advocate Solutions (formerly GCR, Ltd.) as a candidate for the ITB# Bid Number 007115B0003432, DLARA - BFS Accela Modernization Project (Sr. BA). I am committed to performing the work described in the ITB in accordance with all the requirements of the ITB. I look forward to being selected for this engagement.

Sincerely,

  
Brian Adams

Date: 10-27-2014

## Brian Adams – Senior Business Analyst

### Professional Summary

Mr. Adams is a Senior Business Analyst with over twelve (12) years of professional experience. He is a quality-driven IT professional with extensive experience working on full lifecycle projects whose scope has included complex systems. His complex systems experience includes working with cross-functional teams on large-scale IT implementation projects that effect thousands of users and company-wide systems operations. Through his project experiences he has been responsible for facilitating information/requirements gathering sessions, creating and maintaining process maps and data flow diagrams, creating and executing test plans, and creating stage exit documents. He also has experience with-and a thorough understanding of-object oriented and structured programming. In addition, Mr. Adams has experience working on IT projects in a government environment including experience working for the State of Michigan at the Department of Technology, Management and Budget (DTMB). His experiences at the State of Michigan include the early adoption of the State Unified Information Technology Environment (SUITE) methodology, as well as the Systems Engineering Methodology (SEM).

## Requirements / Experience & Results

### Requirement Summary Table

#	Requirement	Candidate Experience
1	<b>Documented experience in functioning as a senior business analyst in successfully completed, recent projects</b>	Exceeds – Over 8 years of successful and recent projects as a Senior Business Analyst
2	<b>Five years' experience creating and maintaining process maps and data flow diagrams</b>	Exceeds – Over 8 years of experience
3	<b>Five years' experience creating SEM stage exit documents</b>	Meets – Over 5 years of experience
4	<b>Five years' experience creating testing plans</b>	Exceeds – Over 11 years of experience
5	<b>Demonstrated experience in facilitating cross-functional discussions</b>	Exceeds – Over 10 years of experience facilitating and working with cross-functional teams
6	<b>Experience leading and facilitating information gathering sessions</b>	Exceeds – Over 11 years of experience leading and facilitating information gathering sessions
7	<b>Onsite, oral interview</b>	Meets – Available for onsite interview – candidate is in the Lansing, Michigan area
8	<b>Familiarity with Java Scripting , Ad Hoc Reporting and Agile/Scrum methodology</b>	Meets – Familiarity with Ad Hoc reporting, Agile/Scrum Methodology and over 10 years of programming experience

#### **Requirement 1 Documented experience in functioning as a senior business analyst in successfully completed, recent projects**

*Mr. Adams has over eight (8) years of experience functioning as a Senior Business Analyst on many successful, recently completed projects.*

#### **Relevant Experience & Projects Meeting the Requirement**

##### **Sparrow Health System – Senior Business Analyst**

**08/2011 – Present (3.3 years)**

- Collaborated with other module application teams, non-Epic application teams, operations, and external vendors to ensure a seamless launch, as part of a \$100M project to implement Epic Systems products throughout the health system.
- Led Resolute Hospital Billing Inpatient “Go Live” affecting 8,000 employees to achieve streamlined onboarding of staff and financial stability. This returned the health system to baseline revenue of \$2.5B annually within three weeks of “Go Live.”
- Successfully consolidated four hospital charge masters and fee schedules into one, including the migration of an entirely

**Requirement I Documented experience in functioning as a senior business analyst in successfully completed, recent projects**

different billing system for one hospital.

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Directed an eight-person system support section team through the definition and implementation of an easy-to-use employee time reporting structure to monitor how employees spend time on tasks; this new reporting system resulted in accurate and relevant data for resource capacity metrics.
- Led the database migration project from MS SQL Server 2000 to MS SQL Server 2005.
- Successfully moved through multiple promotions to manage MS SQL Servers; ensured the security of the data, and optimized performance, disaster recovery, and business continuity, in support of over 4,000 employees within the Departments of Environmental Quality, Natural Resources, and Agriculture & Rural Development.
- Championed the transition of the MS SQL Servers to a virtual platform, with a projected cost savings of \$128,000 over three years in licensing and data center maintenance costs.
- Implemented a Patron Computer Network and Server System for the Library of Michigan, a stand-alone network separate from the State of Michigan network; this system automatically refreshed after a patron ended a session, which significantly minimized support costs.
- Consolidated servers for the Department of History, Arts, and Libraries within a two-month timeframe, with no negative impact on users and rapidly reduced server-hosting costs.
- Automated the processing of Income Withholding Notices for the Unemployment Insurance Agency (UIA) for Friend of the Court (FOC) Payments, this resulted in:
  - Performed business analysis, design, and implementation of batch programs and online systems in a mainframe environment.
  - Communicated with users to determine business requirements of new systems and of system changes.
  - Transformed a manual process into an automated process and achieved a 98% accuracy rate.
  - Reduced costs through decreased processing time and reduced staff hours necessary for data entry and maintenance.

## Requirement 2 Five years' experience creating and maintaining process maps and data flow diagrams

*Mr. Adams has over eight (8) years of experience creating and maintaining process maps and data flow diagrams.*

### Relevant Experience & Projects Meeting the Requirement

#### Sparrow Health System – Senior Business Analyst

08/2011 – Present (3.3 years)

- Created and maintain Charge Description Master–used by the Revenue Integrity Department–charge creation process map and data flow diagram (4 documents).
- Created and maintain detailed Cost Center Assignment process maps and data flow diagrams (1 database and 4 documents) that provides a detailed mapping of relationships and system rules between cost center assignment and departments.
- Created and maintain General Ledger process map and data flow diagram (3 documents) which are:
  - Used monthly by information technology and finance/accounting departments for extract of general ledger data from Epic electronic medical record system to Lawson.
  - Used for the annual financial audit of the health system.
- Created and maintain Cash management process maps and data flow diagrams (4 documents) which:
  - Study current workflows and translate them into appropriate documentation for analysis on how to improve the cash management process.
  - Currently working on implementing a new cash management process.
- Created and maintain the Bed Charge Billing process map and data flow diagram, used by Revenue Integrity, for troubleshooting and informational purposes.
- Created and maintain the Lab Charges Interface process map and data flow diagrams which:
  - Documents the process of information transmitted between the Epic and non-Epic lab system resulting in the successful posting of charges to patient accounts within Epic.
- Created and maintain the Radiation Oncology Charges Interface documentation which, documents the process of information transmitted between Epic and non-Epic system for Radiation Oncology. This results in the successful posting of charges to patient accounts within Epic.
- Created and maintain the Surgery Supply Billing process map and data flow diagrams (3 documents) which provides detailed mapping of the surgery supply cost information load from Lawson to the Epic Surgery OpTime Module and the OpTime Module markup and charge transmittal to Epic Resolute Hospital Billing System.

#### State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)

04/2006 – 08/2011 (5.5 years)

- Created and maintained work and data flows for the Income Withholding Notices for the Unemployment Insurance Agency (UIA) for Friend of the Court (FOC) Payments project (3 documents including a detailed specifications document).
- Created and maintained process maps and data flow diagrams for the MS SQL Server 2000 to MS SQL Server 2005 project, which:
  - Documented current workflows in MS SQL Server 2000 and determined modifications needed within the MS SQL Server 2005 environment for SSIS packages.
  - Were used during the migrations as a step-by-step mapping of how to perform the migrations based on lessons learned during testing.
- Created several process maps and data flow diagrams for the former Department of History Arts, and Libraries project to consolidate servers and ensure the existing applications were successfully migrated to new servers.

**Requirement 3 Five years' experience creating SEM stage exit documents**

*Mr. Adams has five (5) years of experience creating stage exit documents on projects for the Sparrow Health System and for the State of Michigan. Mr. Adams is also experienced with the Systems Engineering Methodology (SEM) and the State Unified Information Technology Environment (SUITE) methodology, as well as the associated documents required to deliver for each methodology.*

**Relevant Experience & Projects Meeting the Requirement****Sparrow Health System – Senior Business Analyst****08/2011 – Present (3.3 years)**

- Collaborate with the entire project team to create exit documentation/lessons learned for each major project.
- Create and review exit documents with the affected departments and use them to help improve the outcome of future projects. Some examples of projects where exit documents were created are:
  - Epic Inpatient Build and Go-Live
  - Diabetes Center Build and Go-Live
  - East Lansing Urgent Care Move
  - Neurophysiology Tower Build Out and Move
  - Inpatient Department Emergency Move (to Recently Vacated Space due to pipe burst and subsequent damage in existing area)
  - Pain Center Epic Care Implementation
  - Infusion Center Epic Care Implementation
  - Medical Oncology Epic Care Implementation

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Created exit stage documentation/lessons learned for the Income Withholding Notices Project, which included metrics on the level of accuracy of the initiative.
- Produced numerous SEM and SUITE documents to support project initiatives, including 402 documents, such as: stage exit documents, firewall settings, network structure documents, execution plans, process documents and migration documents for several SOM projects.

**Requirement 4 Five years' experience creating testing plans**

*Mr. Adams has over eleven (11) years of experience creating and executing test plans.*

**Relevant Experience & Projects Meeting the Requirement****Sparrow Health System – Senior Business Analyst****08/2011 – Present (3.3 years)**

- Created test plans for and drove charge testing within the hospital system to ensure accurate charge capture, and posting of charges to the correct cost centers and accounts; as a result, the system achieved an unprecedented 98% success rate for accurate charges at “Go Live.”
- Create test plans for new areas that go-live with Clinical Tools in order to ensure charges are dropped and posted correctly.
- Create extensive test plans for major and minor system updates; to ensure workflows function as intended.
- Created Sparrow’s Epic Resolute Hospital Billing Disaster Plan testing protocols.

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Created and executed test plans, by collaborating with end users, for the Income Withholding Notices project.
- Created the mainframe Disaster Recovery (DR) plan and collaborated with team members and IBM contractors to successfully test the DR plan.
- Created test plan for the database migration project from MS SQL Server 2000 to MS SQL Server 2005.
- Created and performed test plans for the former Department of History, Arts, and Libraries server consolidation project.
- Created the Patron Computer Network and Server System test plan to ensure that desktops performed as desired and maintained security through the auto desktop refresh process.

**Auto-Owners Insurance – Programmer Analyst****12/2002 – 11/2005 (3 years)**

- Drafted and executed test plans for the new Life Commission System.
- Drove maintenance and change requests of systems, as well as programs, and created test plans for each maintenance and change request; reviewed results following that testing with an end user output review.



**Requirement 5 Demonstrated experience in facilitating cross-functional discussions**

*Mr. Adams has over eleven (11) years of demonstrated experience leading and facilitating cross-functional teams.*

**Relevant Experience & Projects Meeting the Requirement****Sparrow Health System – Senior Business Analyst****08/2011 – Present (3.3 years)**

- Facilitated cross-functional discussions with other module application teams, non-Epic application teams, operations, and external vendors as part of a \$100M project implementation of Epic Systems products throughout the health system.
- Led cross-functional discussions involving system upgrades, maintenance, and optimizations affecting performance and compliance, as the result of ever-changing government laws and regulations. Communicated the decisions resulting from these discussions with users impacted by any changes and upgrades to the system.
- Facilitated discussions for the merging of separate IT professional, hospital, and claims billing teams under IT Enterprise Billing; consolidated services, improved problem resolutions, and streamlined system upgrades across billing applications.
- Coordinated IT Enterprise Billing cross-training to build a knowledgeable team whose members could support any of the billing applications.

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Served as a member of the Transition Process Group charged with facilitating cross-functional teams in the analysis of the structure and defining the transition of Agency Services DEQ/DNR/MDARD to a new organizational structure.
- Facilitated and collaborated with cross-functional team members and IBM contractors to set-up and test the mainframe Disaster Recovery (DR) plan.

**Auto-Owners Insurance – Programmer Analyst****12/2002 – 11/2005 (3 years)**

- Facilitated cross-functional discussions with Life Company leadership, the accounting department, the forms creation department, and the in-house printing department for the production of Life Commission Statements for Agencies.

**Requirement 6 Experience leading and facilitating information gathering sessions**

*Mr. Adams has over eleven (11) years of experience leading and facilitating information gathering sessions.*

**Relevant Experience & Projects Meeting the Requirement****Sparrow Health System – Senior Business Analyst****08/2011 – Present (3.3 years)**

- Responsible for information/requirements gathering for the Epic Resolute Hospital Billing System throughout Sparrow Health System.
- Spearheaded validation sessions, gathering information from approximately 55 management and staff, on the execution of each phase of the billing process and the information needed for the following projects:
  - Epic Inpatient Build and Go-Live
  - Diabetes Center Build and Go-Live
  - East Lansing Urgent Care Move
  - Neurophysiology Tower Build Out and Move
  - Inpatient Department Emergency Move (to Recently Vacated Space due to pipe burst and subsequent damage in existing area)
  - Pain Center Epic Care Implementation
  - Infusion Center Epic Care Implementation
  - Medical Oncology Epic Care Implementation

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Facilitated business information/requirements gathering sessions for new systems and system changes with Unemployment Insurance Agency users.
- Gathered requirements, researched vendors, analyzed viable options, and drafted recommendations for the Michigan Department of Natural Resources (DNR) for the Fire Danger Rating LED Sign for the Clare Welcome Center.
- Facilitated business information/requirements gathering sessions for the Income Withholding Notices Project for the UIA.
- Gathered information/requirements for the Patron Computer Network and Server System.

**Auto-Owners Insurance – Programmer Analyst****12/2002 – 11/2005 (3 years)**

- Led information/requirements gathering sessions for the design and implementation of batch and online systems in a mainframe environment for Life Applications Development.
- Facilitated information gathering sessions for the New Life Commission System which supported thousands of external users.

**Requirement 7 Onsite, oral interview**

*Mr. Adams is in the Lansing, Michigan area and is available for an onsite interview.*

**Requirement 8 Familiarity with Java Scripting , Ad Hoc Reporting and Agile/Scrum methodology**

*Mr. Adams has experience with Ad-Hoc Reporting, is familiar with the Agile/Scrum methodologies and has over eleven (11) years of experience with—and a thorough understanding of—object oriented and structured programming. More specifically, he has direct experience with VBScript, VB.NET, COBOL, CICS, and a familiarity with UNIX/Linux Shell scripting.*

**Relevant Experience & Projects Meeting the Requirement****Sparrow Health System – Senior Business Analyst****08/2011 – Present (3.3 years)**

- Uses Ad Hoc Reporting to set-up templates within Epic that allow end users to customize reports for their individual needs. This includes drafting and distributing tip sheets or other documentation on how users can interact with the reports.
- Use VBScript for the consolidation of legacy systems and reports.
- Learning about UNIX/LINUX Shell Scripting and how to implement it on future projects for Sparrow Health System.

**State of Michigan (DTMB) – Business Analyst / DBA (ITPA 12)****04/2006 – 08/2011 (5.5 years)**

- Wrote and used VBScript to automatically set-up computers for the Patron Computer Network and Server System for the Library of Michigan, a stand-alone network separate from the State of Michigan network. This system automatically refreshed, after a patron ended a session, which significantly minimized support costs.
- Used VB.NET for a historical cemetery application for the former Department of History which tracked and maintained information about all cemeteries in the State of Michigan.
- Followed Agile/Scrum methodologies working on projects for the Michigan Department of Natural Resources (as well as the beginning of the rollout for SUITE).

**Auto-Owners Insurance – Programmer Analyst****12/2002 – 11/2005 (3 years)**

- Used VBScript for the Image Right Document Management System project, which expedited the underwriting and issue of policies, eliminated paper file movement, and provided tracking capabilities and metrics for reporting the efficiency of the underwriting and policy issue process.
- Followed SCRUM methodologies for project work.

## Education, Training and Certifications

**Bachelor of Science, Computer Information Systems**

**Ferris State University**

**Associate of Science**

**Monroe County Community College**

**Continuing Education**

**Henry Ford Community College**

*Continuing education studies to enhance skills and knowledge, include: VB.NET, MS SQL Server, UNIX/Linux Shell Scripting and System Administration, ASP.NET*

**Epic Resolute Hospital Billing Administration Certified**

**Versions 2014, 2012, 2010**

**Epic Single Billing Office Administration Certified**

**Epic Charge Description Master Management Certified**