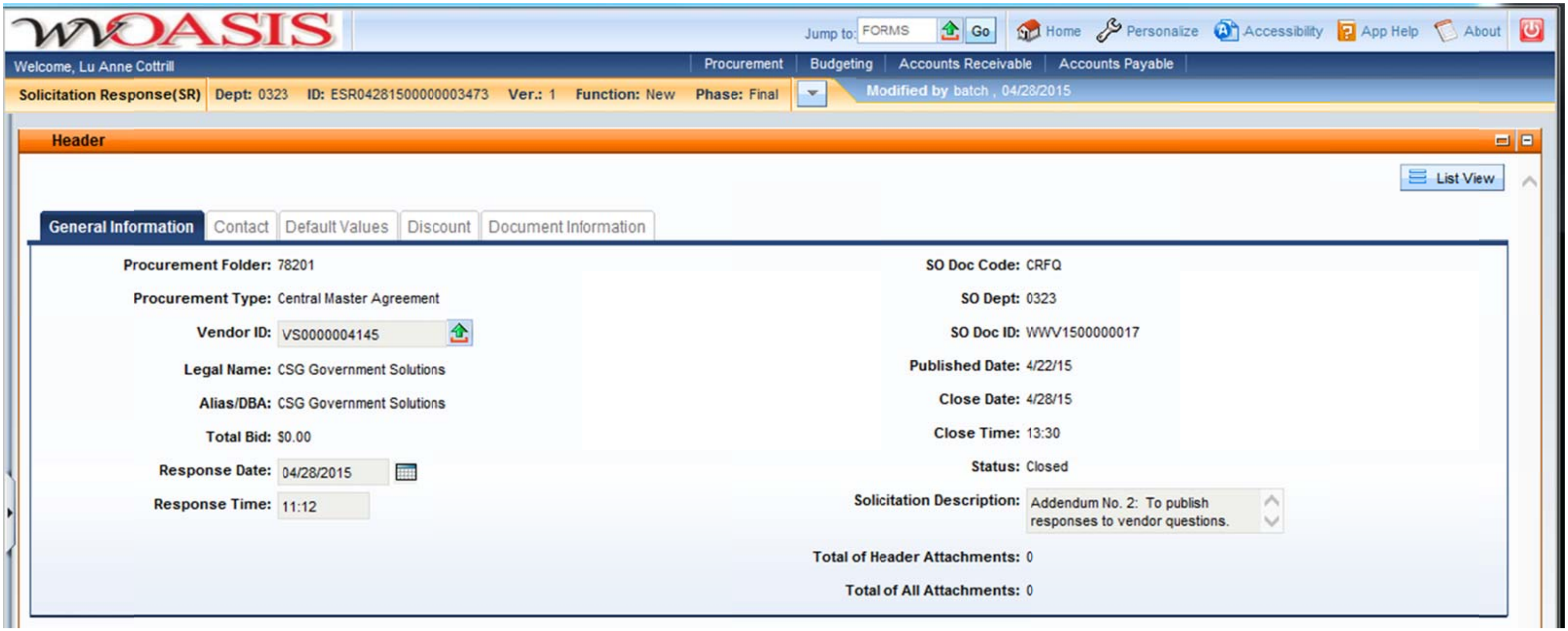
West Virginia
Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at ***wvOASIS.gov***. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at ***WVPurchasing.gov*** with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.



WVOASIS

Jump to: FORMS Go | Home | Personalize | Accessibility | App Help | About

Welcome, Lu Anne Cottrill

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Solicitation Response(SR) | Dept: 0323 | ID: ESR04281500000003473 | Ver.: 1 | Function: New | Phase: Final

Modified by batch , 04/28/2015

Header

List View

General Information | Contact | Default Values | Discount | Document Information

Procurement Folder:	78201	**SO Doc Code:**	CRFQ
Procurement Type:	Central Master Agreement	**SO Dept:**	0323
Vendor ID:	VS0000004145	**SO Doc ID:**	WWV1500000017
Legal Name:	CSG Government Solutions	**Published Date:**	4/22/15
Alias/DBA:	CSG Government Solutions	**Close Date:**	4/28/15
Total Bid:	$0.00	**Close Time:**	13:30
Response Date:	04/28/2015	**Status:**	Closed
Response Time:	11:12	**Solicitation Description:**	Addendum No. 2: To publish responses to vendor questions.
		Total of Header Attachments:	0
		Total of All Attachments:	0

Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Solicitation Response

Proc Folder : 78201

Solicitation Description : Addendum No. 2: To publish responses to vendor questions.

Proc Type : Central Master Agreement

Date issued	Solicitation Closes	Solicitation No	Version
	2015-04-28 13:30:00	SR 0323 ESR04281500000003473	1

VENDOR

VS0000004145

CSG Government Solutions

CSG Government Solutions

FOR INFORMATION CONTACT THE BUYER

Melissa Pettrey

(304) 558-0094
melissa.k.pettrey@wv.gov

Signature X **FEIN #** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Business Analysts to review existing business process	0.00000	EA	$120.00	$0.00

Comm Code	Manufacturer	Specification	Model #
80000000			

Extended Description : Individuals will be responsilbe for reviewing existing process documentation, suggest process improvments, update documentation as needed, review federal and state law changes for inclusion in business process re-engineering, and ultimately assist in a multi-agency initiative that may significantly impact multiple units within the Agency.

Workforce West Virginia
Purchasing Division

Business Analyst
Professional Services

WWV1500000017

Technical Proposal
April 28, 2015

180 N. Stetson
Suite 3200
Chicago, IL 60601

Phone: (312) 444-2760
Fax: (312) 938-2191
www.csgdelivers.com

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY OF QUALIFICATIONS

CSG Government Solutions Overview

CSG Government Solutions is a national leader in government operations consulting focused on delivering high value solutions for our clients. Founded in 1997, CSG provides strategy and planning and project assurance services to help states modernize critical program enterprises. We serve as your trusted advisor for planning, managing, and ensuring the quality of these challenging efforts.

Our national Unemployment Insurance (UI) Practice delivers extensive UI experience to West Virginia that we have gained from successfully completing UI projects in 22 states across the country, including project work for the VMW Consortium. We successfully completed the VMW Requirements Gathering Project, on time and on budget and are currently staffing the Project Control Office. We have guided state UI agencies to be more efficient in their processes to ensure compliance with federal standards and achieve trust fund solvency. Our team has proven experience in assisting states through program modernization efforts that deliver tangible return on investment through successful system modernization projects, streamlined business processes and effective operating procedures.

CSG appreciates that the foundation for success in every project is the people involved in the project, and we have carefully considered your requirements to determine which of our resources best suits your goals. Our staffing strategy for this engagement is rooted in providing consultants with the highest quality of service and expertise. We are confident our CSG PMO has what it takes – experience, expertise, and a disciplined approach – to deliver excellent results for West Virginia

Experience Overview

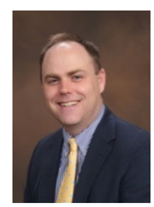
CSG brings extensive UI staffing experience to West Virginia that we have gained from successfully completing UI business process reengineering and software implementation planning and oversight projects in 22 states across the country. The following table presents a partial list of our state and federal government clients:

CSG's Relevant Project Experience
VMW Consortium (MD, WV, VT) UI System Modernization Project Control Office & UI Tax and Benefits Requirements Development
Michigan Unemployment Insurance Agency UI System Modernization Planning, Business Process Analysis and Project Control Office
South Carolina Department of Employment and Workforce UI Business Process Analysis Project
Maine Department of Labor Organizational Development Services
Oregon Employment Department Six Sigma UI Business Process Analysis
WyCAN Consortium (WY, CO, AZ, ND) IV&V Services Project

CSG's Relevant Project Experience
Kentucky Office of Employment and Training UI Business Process Analysis and PMO Office
US Dept. of Labor/Information Technology Support Center Data Validation Technical Assistance and Training Program
Southeast Consortium for Unemployment Benefit Integration (TN, GA, NC, SC) UI System Modernization Feasibility Study/Requirements
Illinois Department of Employment Security UI Tax Laptop Field Audit System
Job Service North Dakota Unemployment Insurance Modernization Directional Study
Illinois Department of Employment Security UI Benefit System Modernization Planning, Requirements, Design

Team Overview

Anthony Bronner – Lead Business Analyst: Anthony is an experience Business Analyst who has worked in information systems since 2005. Anthony has eight years of relevant experience as a Business Analyst in both the private and public sectors, and up to the state level. Anthony brings a strong knowledge of state and federal unemployment insurance (UI) laws, as well as quality assurance (QA) standards to every engagement. Additionally, Anthony brings in-depth knowledge and experience with analyzing and documenting business requirements and processes formulating solutions to satisfy these requirements, involving business process reengineering and/or the deployment of information technology.



Jim Mahony – Contract Manager/Client Executive: Jim is a Vice President with CSG and serves as the Client Executive for this critical project. He brings over 12 years of experience in Unemployment Compensation. Jim has also served as Client Executive on the Michigan UIA Unemployment Insurance System Modernization Project, the US Department of Labor Data Validation Technical Assistance and Training Program Project, Kentucky Office of Employment and Training UI Business Process Analysis project, and the Vermont Department of Labor UI Benefits / Tax / Appeals Requirements Development project. Jim is responsible for overseeing the project team and working with project sponsors and project managers. He is also responsible for quality assurance on all deliverables, providing best practices from Unemployment Compensation Modernization and PMO projects around the country.

Our experience is our strength. CSG Government Solutions has a reputation for bringing experienced, high-quality team members, proven methods and tools, and an intense focus on client satisfaction and delivery to each project. We are confident that our team of business analysts is the best choice for the West Virginia – as we bring PMO and staffing experience, VWM and UI expertise, consortium experience, knowledge of the UI marketplace, and an objective, independent viewpoint. We deliver the project with a partnering approach and an "easy to work with" style and reputation. We look forward to the opportunity to work with you on this critical initiative.

2. PROPOSED BUSINESS ANALYSTS

CSG provides the following required six Business Analysts:

1. Anthony Bronner (Lead)
2. Cheryl Robinson
3. Jennifer Khan
4. Rishiraj Kohli
5. Sharadh Sethuraju
6. Preethika Rai

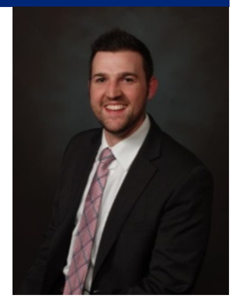
We have provided a detailed resume, two (2) references, and an experience packet aligning previous project work to each of the 14 mandatory requirements for each candidate on the following pages.

2.1 Anthony Bronner – Lead Business Analyst

2.1.1 Resume

Anthony Bruce Bronner

Qualifications



Anthony is an experience Business Analyst who has worked in information systems since 2005. Anthony has eight years of relevant experience as a Business Analyst in both the private and public sectors, and up to the state level. Anthony brings a strong knowledge of state and federal unemployment insurance (UI) laws, as well as quality assurance (QA) standards to every engagement. Additionally, Anthony brings in-depth knowledge and experience with analyzing and documenting business requirements and processes formulating solutions to satisfy these requirements, involving business process reengineering and/or the deployment of information technology.

Experience

- Eight years in information systems
- Eight years as a business analyst in public and private sectors
- Seven years of experience with unemployment claims taking systems

Expertise

- Unemployment insurance (UI)
- UI policy and benefit procedure analysis
- Business process analysis and reengineering
- Quality assurance including U.S. Department of Labor compliance and UI Program performance

Professional Summary

2012 – Present	CSG Government Solutions
2009 – 2012	Michigan Department of Licensing and Regulatory Affairs (LARA), Unemployment Insurance Agency (UIA)
2009 – 2009	Washtenaw County Administrator's Office, Michigan
2009 – 2009	Executive Office of Governor Jennifer M. Granholm
2005 – 2008	Bodman PLC, Attorneys and Counselors
2004 – 2005	Michigan Department of the Attorney General

CSG Government Solutions ***12/2012 – Present***

Staff Consultant

- Serving as a Business Analyst (BA) supporting CSG's Unemployment Insurance practice.
- Act as a trusted advisor assisting state program managers with unemployment insurance modernization projects and the strategic planning process. Demonstrated interpersonal skills including a proven ability to establish confidence, rapport, and foster cooperative relationships with clients and executive level management.
- Experience in unemployment insurance areas including, but not limited to, claims intake processes, certifications, monetary and non-monetary determinations, overpayment, appeals, federal reporting, and United State Department of Labor (USDOL) compliance.

Anthony Bruce Bronner

Maine Organizational Change Management Project (11/2014 – Present)

- Assess Maine Department of Labor's (MDOL) unemployment IT systems to identify system gaps and subsequent business process changes to ready the organization to adopt a new IT system. Document as-is processes mapping to the new system to determine the future state conducting business process reengineering to facilitate workflow efficiencies.
- Administer surveys, questionnaires, and other research tools to assess the business process environment.
- Align job classifications and descriptions to the new business process environment as a result of a new IT system providing recommendations to close job gaps.
- Create and deploy initial readiness assessment, training, communication, stakeholder management, and leadership alignment plans for BUC executive management to use in transforming the organization.

Michigan Integrated Data Automated System (MiDAS) Project (12/2012 – Present)

- Senior business analyst assisting in the oversight of the IT modernization project for Michigan's unemployment insurance program identifying project risks and impacts as they occur and bringing those concerns to the MiDAS project manager's attention.
- Provided QA on functional requirements and business rules traceability.
- Provided feedback to the technical design vendor on functional design from the project control office (PCO).
- Coordinated business analysts' activity to ensure the PCO is represented at functional design and testing meetings.
- Analyzed and documented business requirements and processes formulating solutions to satisfy these requirements, which may involve business process reengineering and/or the deployment of information technology.
- Conducted QA reviews on implementation specification deliverables, testing scenarios, and testing results/feedback on all state functional business analyst activities.
- Coordinated the creation of user acceptance test scenarios and test scripts by UIA staff. Assisted with user acceptance testing for an interactive voice response (IVR) claims filing system including drafting test cases, documenting discovered bugs, and tracking solutions to known system errors.
- Assisted in the gap analysis of Michigan's call center operations providing recommendations to increase performance by implementing low to no-cost solutions.
- Provided support for the ongoing maintenance of the system including tracking performance metrics for UIA executive management assessing any negative impact to business operations.
- Provided UI expertise and best practices to the PCO.
- Maintained and oversaw the Executive Solution Center (ESC) SharePoint tool.

Michigan Department of Licensing and Regulatory Affairs (LARA), Unemployment Insurance Agency (UIA) ***09/2009 – 11/2012***

Policy & Benefit Procedure Analyst – Policy & Compliance Department

- Analyzed and interpreted federal legislation, state legislation, and program letters, and translated information into understandable technical instructions to be used by all field and agency staff.
- Drafted content for procedural manuals and fields releases, including narrative instructions, examples, and facsimiles.
- Revised procedural instructions regarding unemployment insurance programs whenever modifications were required by reforms in state law, federal law, or administrative interpretation. Identified options for policy and procedural changes.
- Ensured the UIA program met QA standards and federal compliance by reviewing UI cases quarterly.

Anthony Bruce Bronner

- Provided technical and interpretive assistance to executive management, agency personnel, employers, and claimants regarding the application of the Michigan Employment Security Act and other applicable laws.
- Composed technical instructions for agency field staff and drafted business rules for IT computer systems.
- Acted as liaison between all departmental agency personnel and the United States Department of Labor (USDOL) in resolving uncommon problems or implementing changes in unemployment programs.
- Responded to Freedom of Information Act (FOIA) requests.
- Designed new and revised forms used in administering agency programs, including determining the required information needed, form formatting, and deciding if revisions warranted field testing. Prepared forms for publication.
- Conducted training for all agency staff determining training needs and completed monthly production reports for management to be used for budget and staffing purposes.
- Served as member of the Benefit Appeals Committee (BAC).

Examiner – Trade Readjustment Assistance Unit

- Administered re-employment services to adversely affected employees according to the Trade Act of 1974.
- Acted as a service representative contacting claimants, employers, and other interested parties to obtain necessary information relative to contested or questionable unemployment and Trade Readjustment Assistance claims.
- Issued monetary and non-monetary determinations and re-considerations, administrative error restitution determinations, and restitution determinations for those both eligible and ineligible under the Trade Act of 1974.
- Conducted audits of claims crediting and charging all employer, state, and federal government accounts.
- Compiled pertinent facts related to potential unemployment insurance fraud, set-up claims cases for the investigation unit, and issued re-determinations.

Washtenaw County Administrator's Office — *08/2009 – 09/2009*

Management Assistant

- Served as primary information liaison between the Board of Commissioners and the public, including the media and citizens.
- Prepared and coordinated the distribution of new releases, public information, and publications regarding the actions and decisions of the County Commissioners and Administrator including budget preparation information.

Executive Office of Governor Jennifer M. Granholm — *01/2009 – 08/2009*

Economic Recovery Office

- In coordination with state agencies, developed priorities for the allocation of the American Recovery and Reinvestment Act funds consistent with the objectives of the Act, including coordinating the communications side of recovery and general stakeholder education.
- Disseminated information to the public, state agencies, legislators, and other recipients of funds through the American Recovery and Reinvestment Act. In addition, researched new grant opportunities and requirements.
- Strengthened relationships with state agencies to develop strategies for effective oversight of Recovery Act funds to ensure compliance with accountability and transparency requirements.
- Created functional requirements for the Michigan Recover web portal
- Composed content for a Recovery web site and social media outlets to reflect current grant and funding opportunities.

Anthony Bruce Bronner

- Conducted community outreach to obtain information in planning recovery related public relations events for the governor. Composed briefs on legislative activity and new grant opportunities, and analyzed proposed legislation.

Bodman LLP, Attorneys and Counselors — *01/2005 – 08/2008*

Records Manager

- Supervised records and clerical staff to ensure that all legal records were accurately entered in records management database along with various other departmental operations.
- Handled staffing issues, including hiring, evaluation, counseling, and terminating employees.
- Developed and implemented proposal for off-site storage services reducing estimated annual costs by $10,000 and procuring off-site records services.
- Researched and prepared reports for the board that detailed the best practices of records maintenance regarding their approach to storage issues, such as addressing digital storage concerns and retention.
- Analyzed department operation and recommended modifications of policy and procedures.
- Organized and administered training and orientation seminars for support staff and revised training manuals.
- Maintained personnel records, including recruitment files, leave requests, and electronic pay / attendance information.

Michigan Department of the Attorney General — *07/2004 – 01/2005*

Intern – Civil Rights and Civil Liberties Division

- Researched civil rights topics relating to various discrimination cases.
- Drafted and revised citizen correspondence in response to constituent complaints.

Education and Certifications

University of Michigan, bachelor of arts with distinction/honors, political science and sociology (2005)

Wayne State University, master of public administration with honors, human resource management (2009)

University of Detroit – Mercy, master of business administration with honors, marketing (2013)

Relevant Skills

- **Microsoft Office Tools:** Word, Excel, PowerPoint, Visio, Access
- **Collaboration & Content/Knowledge Management Tools:** SharePoint, Lync, Jive, , WebEx Connect
- **Project Management Tools:** Microsoft Project, TeamCSG℠ Tracker
- **Strategic Planning and Analysis:** TeamCSG℠ Risk Assessment Models, CSG REALize℠ Maturity Models
- **Requirements Development and Management:** Rational RequisitePro, Rational Requirements Composer, Rational Jazz Team Server (Maine repository of use cases, process analysis diagrams, requirements, etc.), TeamCSG℠ Tracer, CSG REALize℠ UI Functional Requirements Baseline
- **Modeling and Design:** Visio; Rational Software Architect;, Context Diagrams, Use Cases; Business Process Modeling Notation (BPMN);
- **Testing and Quality Management:** Rational Test Manager, Rational Functional Tester, test plan development, test case development, manual and automated test execution, User Acceptance Testing
- **Graphic Design and Desktop Publishing:** Adobe Photoshop, InDesign, Acrobat; Jasc Paint Shop Pro

Anthony Bruce Bronner

Recognition

- Beta Gamma Sigma International Honor Society for Business Administration
- Phi Alpha Alpha National Honor Society for Public Affairs and Public Administration
- Civil Service Board Member, City of Ferndale, Michigan
- Member of the Detroit Chapter of the American Society for Public Administration (ASPA)
- State of Michigan LARA Patent Reinvention Award, October 2011
  - ✓ Recognizes employees for innovation ideas to enable government to function more efficiently and cost-effectively.
- Bodman PLC Take-A-Bow Program, June 2006
  - ✓ Recognizes employee excellence in client service.

2.1.2 References

Reference #1	
Start Date: 12/2012	**End Date**: 10/2014
Client Name: State of Michigan, Unemployment Insurance Agency **Contact Name**: Clay Tierney **Title**: Director of Technology & Modernization **Phone**: 313-456-3190 (Project Office) **Email**: tierneyc@michigan.gov	
Description of Work Performed: Acted as a business analyst with the Michigan, UIA Project Management Office (PMO) reviewing system documentation, providing subject matter knowledge in the UI Program, provided quality assurance and business rules traceability, analyzed and documented business requirements and processes formulating solutions to satisfy these requirements, which may involve business process reengineering and/or the deployment of information technology.	

Reference #2	
Start Date: 11/2014	**End Date**: Present
Client Name: State of Maine, Department of Labor, Bureau of Unemployment Compensation **Contact Name**: Patricia O'Brien **Title**: Deputy Bureau Director **Phone**: 207-621-5161 **Email**: Patricia.K.O'Brien@Maine.gov	
Description of Work Performed: Served as a UI business analyst assessing Maine, BUC's current system and business process environment along with reviewing system documentation for Maine's new system to identify potential changes in the agency. Assisted CSG project staff with formulating recommendations regarding training, communication, stakeholder management, leadership alignment, and job classification.	

2.1.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Anthony has 4 years of experience analyzing and defining business objectives and strategies. Provided below is a sample list of key projects demonstrating Anthony's experience ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **MiDAS Project, State of Michigan Unemployment Insurance Agency (08/2010 – 10/2012)** ➢ **Maine, Bureau of Unemployment Compensation Organizational Change Management Project (11/2014 – Present)** These projects involved the following tasks: ➢ Reviews use cases, system analysis diagrams, interfaces, batch process, user manuals, and business rules to determine business workflows and changes prior to system implementation. Analysis also included providing business process improvements prior to deployment of Maine's new system ➢ Provides business process improvements post-deployment for Michigan UIA related to benefit processes. Interview and reviewed workflows to provide recommendations to improve business processes.
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Anthony has 5 years of experience reviewing documentation, procedures, and processes. Provided below is a sample list of key projects demonstrating Anthony's experience ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **MiDAS Project, State of Michigan Unemployment Insurance Agency (08/2010 – 10/2012)** ➢ **Maine, Bureau of Unemployment Compensation (BUC) Organizational Change Management Project (11/2014 – Present)** These projects involved the following tasks: ➢ Reviewed use cases, system analysis diagrams, interfaces, batch process, user manuals, and business rules to determine business workflows and changes prior to system implementation. Analysis also included providing business process improvements prior to deployment of Maine's new system. Work with vendor and Maine, BUC subject matter expertise to design swim lane diagrams to better understanding changes with a new system.

Project Experience Summary	
	➢ Provided business process improvements post-deployment for Michigan UIA related to benefit processes. Interview and reviewed workflows to provide recommendations to improve business processes. Worked with DDI vendor for system deployment and then post-deployed with a business process reengineering project for UI benefits.
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Anthony has 5 years of experience identifying and documenting business requirements. Provided below is a sample list of key projects demonstrating Anthony's experience ➢ **UI Policy & Procedure Analyst, State of Michigan UIA (02/2010 – 09/2012)** ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **Maine, Bureau of Unemployment Compensation (BUC) Organizational Change Management Project (11/2014 – Present)** These projects involved the following tasks: ➢ Reviewed system documentation to identify business functionality that may not be captured by a functional requirements or a business rule ➢ Assisted State of Michigan technology project staff will modifying or creating new business rules as it related to law changes stemming from legislation including, but not limited to Michigan Public Acts 269 of 2011, 216 of 2012, and 218 of 2012. ➢ As UI Policy Analyst, interpreted state and federal legislation for UI program staff translating into agency procedures and system training manuals.

Project Experience Summary	
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Anthony has 5 years of experience evaluating gathered information from various sources and reconciling differences or conflicts. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **UI Policy & Procedure Analyst, State of Michigan UIA (02/2010 – 09/2012)** ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **Maine, Bureau of Unemployment Compensation (BUC) Organizational Change Management Project (11/2014 – Present)** These projects involved the following tasks: ➢ Decomposed low-level system documentation for the State of Maine to understanding system design and configuration to assess changes and potential future impacts to BUC's UI operations. ➢ Acted as counsel to the Michigan Change Management Board providing subject matter knowledge assisting business and technical directors to assist with strategic system and business process changes.
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Anthony has 5 years of experience communicating and collaborating with external and internal customers. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **Executive Office of Governor Granholm, Economic Recovery Office Web Portal Project (01/2009 – 08/2009)** ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **IManage Upgrade Project, Bodman PLC (02/2007 – 07/2008)** These projects involved the following tasks: ➢ Communicated with governor's business and technical staff to gather, document, and create requirements for the Michigan Recovery web portal. ➢ Reviewed and provided edits to vendor staff on behalf of the State of Michigan Project Management Office (PMO) to use cases for claims intake, weekly continued claims (certifications), investigations (Cross-matches, fraud investigations), and support (federal reporting). ➢ Reviewed and provided edits to vendor implementation specifications on behalf of the State of Michigan, UI PMO for claims intake, support, investigations, non-monetary determinations, employer charging, and monetary determinations. ➢ Drafted and documented all business rules for Bodman PLC's IManage record file system.

Project Experience Summary	
4.1.1.6 Work in multiple functional business areas simultaneously ("multi-task")	Anthony has 7 years of experience working in multiple functional environments. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **UI Policy & Procedure Analyst, State of Michigan UIA (02/2010 – 09/2012)** ➢ **Maine, Bureau of Unemployment Compensation (BUC) Organizational Change Management Project (11/2014 – Present)** ➢ **Virtual Hold Technology, State of Michigan, CSG Government Solutions (10/2013- 05/2014)** ➢ **IManage Upgrade Project, Bodman PLC (02/2007 – 07/2008)** These projects involved the following tasks: ➢ Collaborated with Michigan technology and UIA business staff in multiple areas of the UIA program as part of the MiDAS Project. ➢ As UI Analyst, was chiefly responsible for working with all UI business areas to create procedures, modify agency policies, and provide quality assurance reviews over the UI program. ➢ As part of the Maine Organizational Change Management Project, interviewed BUC staff assessing the "as-is" and "to-be" system and business process state for all UI business areas evaluating business areas and staff that are likely to be impacted by a new system. ➢ As part of the VHT Project, worked with Michigan IVR technical staff, two contracted vendors, and UI representatives from claims filing and ➢ At Bodman PLC, collaborated with shareholding attorneys from each major practice group within the firm to identify legal retention needs for an electronic document records system.

Project Experience Summary	
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Anthony has 3 years of experience evaluating requested process changes and making recommendations as to whether or not they should move forward. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **IManage Upgrade Project, Bodman PLC (02/2007 – 07/2008)** These projects involved the following tasks: ➢ Assisted in chairing the Michigan, UI Change Management Board assessing requests to modify or add system functionality for multiple IT systems. Created priority lists, cost analysis, and recommendations to assist in making decisions on whether or not to implement a change. ➢ Created a cost benefit analysis, return on investment, and mitigation risk plan associated with implementing a new legal records retention system.
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Anthony has 4 years of experience serving as a liaison between various business and technical units and staff. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **UI Policy & Procedure Analyst, State of Michigan UIA (02/2010 – 09/2012)** ➢ **Virtual Hold Technology (VHT), State of Michigan Unemployment Insurance Agency, CSG Government Solutions (10/2013 – 05/2014)** These projects involved the following tasks: ➢ Represented the State of Michigan, Unemployment Insurance Agency as a trusted advisor and business analyst collaborating with the DDI vendor, business staff, and other State of Michigan agencies in an effort to implement an integrated tax and benefits solution. ➢ Acted as a communication channel and business analyst working with State of Michigan UIA business staff and the claimant community with post-deployment support including desk-side support to assist internal staff with navigating the new system. ➢ Acted a business analyst for the VHT Project working as a go-between with UIA business staff, the VHT implementation vendor, Michigan technical staff, and internal staff at teach Michigan UIA call center to deploy VHT for the UIA's IVR telephone filed claims system.

Project Experience Summary	
4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs	Anthony has 4 years of experience collaborating with multiple members of project teams. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project (Business Process Reengineering), CSG Government Solutions (12/2012 – 10/2014)** ➢ **Maine, Bureau of Unemployment Compensation (BUC) Organizational Change Management Project (11/2014 – Present)** These projects involved the following tasks: ➢ Worked with the Maine MRM Consortium Project staff to identify system and business process changes and the impacts to UI operational performance making recommendations to mitigate potential risks. ➢ Collaborated with State of Michigan UIA business staff on a benefits business process reengineering effort providing recommendations to improve operational performance analyzing impact to UI performance measures along with both positive and negative impacts with each recommendation.

Project Experience Summary	
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Anthony has 6 years of experience analyzing and reviewing laws and regulations that affect business and technical areas and aspects of projects. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **UI Policy & Procedure Analyst, State of Michigan UIA (02/2010 – 09/2012)** ➢ **Executive Office of Governor Granholm, State of Michigan (01/2009 – 08/2009)** ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** These projects involved the following tasks: ➢ As UI Analyst in Michigan, analyzed and interpreted federal legislation, state legislation, and program letters, and translated information into understandable technical instructions to be used by all field and agency staff. Revised procedural instructions regarding unemployment insurance programs whenever modifications were required by reforms in state law, federal law, or administrative interpretation. Identified options for policy and procedural changes based on law changes or administrative interpretation. ➢ As a business analyst with CSG Government Solutions, Anthony routinely reviews state and federal legislation, reviews recent UIPLs, and monitors information from NASWA to ascertain changes to the UI program that may affect UI modernization efforts, in particular with his experience with the State of Michigan and the State of Maine. ➢ As part of the Economic Recovery Office, reviewed and drafted policy summaries and impacts for transportation and labor legislation (federal and Michigan legislation).

Project Experience Summary	
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency's needs.	Anthony has 4 years of experience creating test plans and training materials. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **Virtual Hold Technology, State of Michigan, CSG Government Solutions (10/2013 – 05/2014)** ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **Michigan UI Telephone Filed Claims (TFC) Upgrade, CSG Government Solutions (12/2012 – 10/2013)** These projects involved the following tasks: ➢ Creation of Test cases for an IVR system ➢ Development of Test cases for a web-based system ➢ Drafting Test Plans ➢ UAT Testing for TFC & VHT Projects ➢ Logging failed test case scenarios and tracking bugs/defects ➢ Identify business process and system changes to be incorporated into developing training materials for staff ➢ Identify business process changes to update agency procedures
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Anthony has 6 years of experience gathering requirements and ensuring they meet the needs of project stakeholders and project goals. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** ➢ **MiDAS Project, State of Michigan Unemployment Insurance Agency (UIA) (08/2010 – 10/2012)** ➢ **IManage Upgrade Project, Bodman PLC (02/2007 – 07/2008)** These projects involved the following tasks: ➢ Requirements Gathering for Michigan, UIA ➢ Business Rule Drafting for Michigan UIA ➢ User Acceptance Testing mapping test cases to system use cases, requirements, and business rules for Michigan UIA ➢ Vendor Procurement support for Michigan UIA ➢ Requirement Gathering for Bodman PLC

Project Experience Summary	
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Anthony has 2 years of experience providing subject matter expertise and knowledge identifying project risks and issues. Provided below is a sample list of key projects demonstrating Anthony's experience. ➢ **MiDAS Project, CSG Government Solutions (12/2012 – 10/2014)** This project involved the following tasks: ➢ Assisted DDI vendor staff for the MiDAS Project with UUI knowledge related to data for claims intake, weekly continued claims (certifications), non-monetary issues, monetary determinations, UI investigations (fraud) and federal reporting.
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	➢ I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

2.2 Cheryl Robinson – Business Analyst

2.2.1 Resume

Cheryl Robinson

Qualifications

Cheryl Robinson is a Senior Consultant with CSG and has worked in Information Technology since 1980. She has 17 years of project management experience managing large, complex multi-year systems development projects with Georgia's Department of Revenue. She holds Project Management Professional (PMP) certification from the Project Management Institute and functions as a Project Manager supporting CSG's Revenue/Tax practice. Cheryl possesses extensive experience in leading in controlling all of the project activities from initiation including planning, estimating, budgeting, scheduling, structuring walkthroughs, issue tracking and project execution. She has a proven track record of completing multiple complex multi-year systems projects on time and within budget.

Experience

- 17 years of project management experience
- 11 years of system analysis experience
- Execute all Project Management processes and deliverables within PMO guidelines
- Manage SOW, Scope Summary, WBS and other project documents and deliverables
- Articulate project status thru meetings and formal communication notifications
- Monitor project schedule, financials, and risks to track planned versus actual
- Analyze and control proposed changes to the project plan or cost estimate
- Set project expectations for project stakeholders
- Collaborate with technical resources on application and infrastructure solutions
- Proven expert in large scale conversions, system upgrades, and implementations
- Design and execute Test, Implementation and Post Implementation Plans

Expertise

- Project management practices
  - ✓ Deliverable management and tracking
  - ✓ Quality management
  - ✓ Resource management
  - ✓ Requirements development and management
  - ✓ Schedule management
  - ✓ Time management
  - ✓ Vendor management
- Information Technology Management
  - ✓ Capital expenditure budgeting
  - ✓ Enterprise wide initiative management
  - ✓ Technology staff management
  - ✓ Systems methodology development and implementation

Professional Summary

2014 – Present	CSG Government Solutions
2012 – 2014	NASCO, LLC (Blue Cross Blue Shield Health Claims Processing)
1997 – 2012	Georgia Department of Revenue
1986 – 1997	SunTrust Banks

Cheryl Robinson

CSG Government Solutions ***04/2014 – Present***

Senior Consultant

- A Project Manager supporting CSG's Revenue/Tax practice
  - ✓ Assess project health, software functional processes and required procedures to ensure a quality implementation.
  - ✓ Submit project status reports of vendor's adherence to contracts and deliverables.
  - ✓ Advise client of project risks and mitigation options. Respond to client and/or vendor's questions and concerns.
  - ✓ Review and submit IV&V testing results and recommendations to client.

NASCO, LLC (Blue Cross Blue Shield Health Claims Processing) ***04/2012 – 04/2014***

IT Consultant, Senior Project Manager

Project Management:

- Developed and executed environment plans for time, cost, scope, human resources, procurement, and integration for the all components needed to build, and integrate Release Test Beds to support releases.
- Provided status on project progress for Infrastructure and Application dependencies.
- Managed roll out of a Change Management process to ensure that changes to the environment had been properly analyzed and adequately coordinated and did not adversely impact the health of the testing for the release candidates.

Operational Readiness Management:

- Assisted in ensuring client releases are implemented successfully
- Served as consultants to projects that are part of releases to prepare for production implementations.
- Bridged gaps between development and production support ensuring that products delivered are operationally supportable and implemented with minimal downtime and negative impact.
- Provided documentation and support to project teams regarding implementation readiness deliverables.

Engagement Management:

- Led engagement planning
- Mobilized and managed IBM onshore (US) and offshore (India, Brazil) resources thru project completion
- Facilitated buy-in of proposed solutions
- Direct on-time, quality delivery of work products
- Managed engagement economics and risks; Provide project guidance to Release Managers

Client Management:

- Managed project interactions with executive clients and sponsors;
- Submitted RFS for billable service requests
- Identified costs savings infrastructure improvement opportunities
- Maintained, communicated and distributed project documentation
- Defined, conducted and managed 'Proof of Concept' and 'Proof of Technology' projects on client's behalf;
- Provided leadership and support for delivery teams

Business Development:

- Organized Compuware Maturity Assessment for NASCO's system and server performance management

Cheryl Robinson

- Developed and maintained contact with top decision makers
- Organized and led pursuit teams
- Participated and led aspects of proposal development process.

Systems and Application Upgrades:

- Including Web applications/URL and web services using Agile and Waterfall methodologies.
- Managed deployment of server builds, AIX OS Upgrades, Extranet conversion to SharePoint Sites, VMware, SQL, VPN tunnel, Mainframe CICS Upgrade, NDM, LDAP Upgrade, Message Queue Upgrade, .Net Platform, FTP server migration.

Application Integration:

- Guide solution deployment with Application Development, QA Testing, Engineering, Architecture, Release Management, Infrastructure, and Operations to gather all requirements necessary to build, integrate, and govern large scale end to end environments.

Projects Managed and implemented thru full SDLC process:

- Web applications/URL and web services
- Windows Intel server builds
- Extranet conversion to SharePoint Sites
- Upgrades: AIX OS, Mainframe CICS, NDM, LDAP, Active Directory, Message Queue
- Reconfigure .Net Platform,
- FTP server migration.
- Implementation of VPN tunnel, VMware, SQL

Georgia Department of Revenue	***09/1997 – 03/2012***

Project Manager

PMO:

- Researched and provided recommendations for PMO best practices to IT Governance.
- Provided input to the development and implementation of new IT PMO processes.
- Provided training on SDLC best practices for Agile and Waterfall Methodologies.
- Made recommendations (within IT strategy) for a continuous improvement process related to IT PMO and methodologies.
- Standardized deliverables for SDLC process and templates for KPI and Dashboard templates for project status reporting.

Systems integration:

- Provided technology solution development and Integration across the SDLC including requirements, functional specs, design, custom development, integration, testing, and deployment.
- Maintained a strong focus on structuring, managing, and implementing complex technical solutions requiring deep business expertise, process optimization, and business operations knowledge to achieve significant and measurable business value.

Application Management:

- Provided complete operations services for application management, custom development, and business process outsourcing.
- Developed the post implementation go-live support environment, constructed the transition plan from the project team to the support team, and supported and maintained vendor applications and technology

Cheryl Robinson

infrastructure

People Development:

- Performed role of counselor and coach
- Provided input and guidance into the staffing process
- Actively participated in staff recruitment and retention activities
- Provided leadership and support for delivery teams

Revenue and Tax Applications Implementations

Legacy waterfall conversions to Agile developed COTS package (01/2003 – 03/2012)

- Deployed complex, multi-year, multi-release mainframe tax system conversion to an integrated COTS tax package.
- Implemented an integrated solution from stand-alone Corporate Tax, Withholding Tax, Motor Fuel Distributor Tax, IFTA Tax, Sales Tax, Registration, Taxpayer Accounts, Electronic Funds Transfer and Revenue Recording systems
- Presented Vendor literature and demoed prototypes to selected Voting Participants. Conducted requirements analysis and survey sessions to obtain preferred Vendor list.
  - ✓ Facilitated the Vendor Selection Process.
- Directed a team of 10 programmers thru the extraction, transposing and loading of 10 years of data from 200+ mainframe DB2 tables to SQL server distributed databases with customized COBOL programs.
  - ✓ Maintained existing CICS online systems thru all conversions.
- Created and maintained Project Plan using MS Project and utilized SharePoint Site for Project documentation repository
- Managed projects thru complete SDLC process including feasibility study, vendor selection, project charter, business requirements, software development, testing, quality control, configuration management, implementation and closing.

Individual Income Tax Web Service IVR (02/2010 – 12/2012)

- Presented current IVR process and facilitated requirements gathering for new IVR Call Flow to 50+ team members
  - ✓ Led 5 member vendor team through development, testing and implementation of web-service interface and application response using Agile/iterative methodology
  - ✓ Led team of 4 programmers to develop customized COBOL, DB2 programs to extract legacy data, transpose data, and write to SQL table on client platform.
- Coordinated responsibilities among AT&T Voice Tone, AT&T Platform, and DOR Network teams for the design and implementation of new network infrastructure and IVR Call Flow changes
  - ✓ Worked with ATT Retail to present new features, options , and costs to System Owner
  - ✓ Built consensus on web-services interface design between AT&T Voice Tone and Integrated Tax vendors
- Translated new call flow requirements to Technical Design document
- Influenced decision of which server domain to host IVR data based on servers age, performance, stability, and design complexity
- Managed existing CICS IVR systems thru conversion.
- Provided standards and guidelines for Federal Data encryption, server certification, and data definitions for web-service

Cheryl Robinson

- Collaborated with Data Architect to create Data Process Flow
- Created Test Plan and managed Call Center user acceptance testing

Online Security System Authorization (10/2010 – 11/2011)

- Performed annual system walk-thru for Georgia State internal Auditors
- Wrote Business case to justify automation of paper intensive Security Authorization procedure
- Influenced System Owner, Vendor, and IT Directors to add online feature to COTS package allowing managers and supervisors to formally request, alter, and cancel user rights within the Integrated Tax System
- Met State guidelines requiring recording and archiving user security rights
- Met State guidelines requiring signatures (e-signatures) from Directors who must approve or approve by proxy each authorization change
- Provided time saving and cost saving benefits for IT Department's annual State Auditors examination
- Recommended design and features of online process
- Coordinated vendor development using Agile methodology with In-house development team using waterfall methodology
- Presented test prototypes to stakeholders after each development iteration
- Insured feature of user authentication between LAN and Active Directory
- Trained the Trainers on new process

Infrastructure and Architecture Implementations

Upgrade network infrastructure and validate tax applications (11/2011 – 04/2012)

- Directed effort to define and depict current Imaging system network showing complex Integrated Tax System conversion
- Defined connectivity dependencies, ports, IPs, Protocols, etc. between database and application servers plus web services, user access and authentication software as input to AT&T RFS (network infrastructure, equipment orders, and new VLAN solution) and IBM RFS (servers and san order and standing-up newly configured steady-state environment)
- Managed application testing of DOR Network, Database, COBOL , DB2, CICS Applications, and User teams to validate new network connectivity and applications

Data Center Build-out and Migration (01/2012 – 04/2012)

- Collaborated with Builder and DOR Finance Division to oversee completion of 108,000 sq. ft. of interior space
- Coordinated transportation needs with MARTA; coordinated Highway and roadway signage with GDOT
  - ✓ Developed Risks plan.
  - ✓ Developed Communications Plan
- Wrote monthly newsletter highlighting project milestones distributed department wide by Personnel Director
- Provided weekly status of site progress to Senior Management
- Maintained equipment deliverables for 500+ employees, computers, phones, cubes, and furniture plus electrical wiring specifications for PBX, UPS, and HVAC in telecom and server rooms and QMatic equipment

Cheryl Robinson

Systems Upgrade Implementations

Mainframe DB2 Upgrade, CICS upgrade (2003 – 2004)

- Analyzed 100+ Sales Tax and Taxpayer Registration DB2, CICS, COBOL programs, procs, JCL, copybooks, and tablebase entries to estimate time and cost to upgrade to new DB2 and CICS versions
  - ✓ Created test scripts for application testing
- Led team of 15 to code, and performed unit, systems and UAT testing of Taxpayer Registration system using waterfall methodology
  - ✓ Wrote employees' annual evaluations
- Provided time and cost estimations using WBS
- Developed Project plan using MS Project
- Collaborated with team to write Risk Plan

Technical Team Lead and Subject Matter Expert

Production Support for Revenue, EFT, Registration, Sales Tax (1998-2002)

- Led Teams of 5 – 20 on concurrent enhancements and production fixes to CICS and batch programs using DB2, VSAM, and sequential data storage
  - ✓ Made hiring decisions
- Accountable to Directors for monthly distribution of $420M to fund Georgia counties
- Responsible for completion of overnight batch cycles and system availability during working hours
- Provided cost & time estimations for all enhancements and rewrites mandated by GA Legislature
- Provided end-user training as needed
- Supported systems integration testing of interfacing application changes

Y2K Remediation (1997 – 2000)

- Analyzed and identified all programs with data elements requiring a two-digit century byte or code needed to distinguish century.
- Led Team of 7 to make all coding changes, unit, systems integration, and UAT testing
- Implemented and monitored all Y2k changes from December 31, 1999 to January 1, 2000
- Provided application status to Senior Management

EFT and Revenue Collections systems (1997 – 1998)

- Responsible for completion of all EFT transactions and testing changes to ACH file layout with partner Bank teams
- Analyzed applications to determine coding changes for converting system from VSAM to DB2
- Handled production implementations and issues with overnight batch cycles and system down time

SunTrust Banks — *06/1986 – 08/1997*

Systems Analyst

- Debug, code, and test changes to various bank applications
- Production support of Asset Liability, Commercial Loans, Loan Recovery, and Trust Accounts systems
- Disaster Recovery plan

Cheryl Robinson

Education and Certifications

Georgia State University, Bachelor of Business Administration/CIS (1985)

PMP Certification, Project Management Institute (2011)

Six Sigma Black Belt, Aveta Business Institute (2012)

Lean Six Sigma & DFSS, Aveta Business Institute (2012)

Relevant Skills

- **Microsoft Office Tools:** Word, Excel, PowerPoint, Visio
- **Collaboration & Content/Knowledge Management Tools:** SharePoint, WebEx Connect
- **Project Management Tools:** Microsoft Project, TeamCSG℠ Tracker
- **Strategic Planning and Analysis:** TeamCSG℠ Risk Assessment Models, TeamCSG℠ Maturity Models
- **Requirements Development and Management:** TeamCSG℠ Tracer, TeamCSG℠ UI Functional Requirements Baseline
- **Modeling and Design:** Visio; Activity Diagrams, Context Diagrams, Agile, Waterfall, and hybrid methodologies
- **Testing and Quality Management:** test plan development, test case development, manual and automated test execution, User Acceptance Testing
- **Database Technologies:** SQL, Oracle, IBM DB2, Microsoft SQL Server,
- **Middleware and Other Platforms:** Microsoft Office SharePoint Server, WebSphere Application Server, Microsoft IIS, WebSphere MQ, Microsoft MQ

2.2.2 References

Reference #1	
Start Date: 2011	**End Date**: 2012
Client Name: GA Department of Revenue **Contact Name**: Curtis Stone **Title**: IT Application Manager, General Motors **Email**: Curtis.Stone@yahoo.com	
Description of Work Performed: Served as the project manager, systems analyst, and developer on the IVR project. Responsible for the IVR systems testing, implementation, and production support.	

Reference #2	
Start Date: 2010	**End Date**: 2012
Client Name: GA Department of Revenue **Contact Name**: Ron Comer **Title**: IT Systems Analyst – ITS project **Email**: Ron.Comer@GA.Tax.gov	
Description of Work Performed: Served as a systems analyst, business analyst, and developer for the ITS project. Responsible for custom coding, migration, and conversion of all taxpayer registration data from mainframe to COTS.	

2.2.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Cheryl has more than 10 years of systems analysis and business process reengineering experience. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing systems analysis and business process reengineering: ➢ **ITS – Automating On-boarding/Off-boarding, GA Department of Revenue (2011)** ➢ **ITS – Security Access, GA Department of Revenue (2011)** These projects involved the following tasks: ➢ Definition of business objectives and strategies ➢ Analysis of business process work flow ➢ Analysis of data flow thru systems ➢ Custom code enhancements to automate data processing ➢ Redesign of business process work flow to integrate with system changes
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Cheryl has more than 15 years of experience reviewing technical documentation, processes, and procedures. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing document and process review tasks: ➢ **IVR, GA Department of Revenue (2011)** ➢ **Data Center Infrastructure, GA Department of Revenue (2012)** These projects involved the following tasks: ➢ Review of technical documentation including Network and application topology diagrams, data flow diagrams, and business process flows ➢ Update or creation of documentation where needed

Project Experience Summary	
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Cheryl has 14 years of experience responding and adhering to project scope changes from the Georgia state legislature. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing documentation of requirements derived from project scope change or legislative changes : ➢ **Sales Tax Holiday, GA Department of Revenue (Annually)** ➢ **Adding new tax types, GA Department of Revenue (1997 – 2012)** ➢ **Imaging system upgrade, GA Department of Revenue (2012)** These projects involved the following tasks: ➢ Reviewing legislative mandate ➢ Analyzing tax applications and processes ➢ Identifying and documenting business requirements ➢ Presenting findings to IT Management for review and approval
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Cheryl has more than 10 years of experience evaluating and reconciling, information from multiple sources, and decomposing high-level information into process details Provided below is a sample list of key projects demonstrating Cheryl's experience in performing evaluation of information, reconciliation, and decomposition tasks : ➢ **Imaging System upgrade, GA Department of Revenue (2012)** This project involved the following tasks: ➢ Gathering server documentation from IBM ➢ Gathering network documentation from AT&T ➢ Gathering system documentation from multiple Image applications manager ➢ Interviewing Imaging application team members ➢ Mapping process details and data flow using Visio and BPMN
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Cheryl has more than 15 years of experience communicating and collaborating with customers. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing project communication tasks : ➢ **Imaging System upgrade, GA Department of Revenue (2012)** This project involved the following tasks: ➢ Identifying internal and external customers ➢ Proactively eliciting requirements from all sources ➢ Analyzing functional requirements with customers ➢ Distributing project status reports ➢ Presenting findings to stakeholders and team members and collaborating to determine next steps

Project Experience Summary	
4.1.1.6 Work in multiple functional business areas simultaneously ("multi-task")	Cheryl has more than 15 years of experience working across multiple functional business areas simultaneously. Provided below is a sample list of key projects demonstrating Cheryl's experience in multi-tasking across multiple business areas simultaneously: ➢ **ITS - IFTA, Employer Name (2011 – 2012)** ➢ **ITS- Withholding Tax, Employer Name (2011 – 2012)** ➢ **ITS- Corp Tax, Employer Name (2011 – 2012)** These projects involved the following tasks: ➢ Analyzing current data elements across all business areas ➢ Collaborating with customers to define data elements ➢ Mapping current data elements to new databases ➢ Collaborating with customers to verify all data
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Cheryl has more than 15 years of experience proactively challenging business units, evaluating requested changes, and presenting alternatives where possible. Provided below is a sample list of key projects demonstrating Cheryl's experience in proactively challenging business units, evaluating requested changes, and presenting alternatives where possible: ➢ **SharePoint Intranet site, NASCO (2012 – 2013)** ➢ **Asset Management system, NASCO (2012 – 2013)** These projects involved the following tasks: ➢ Analyzing business requests ➢ Meeting with business team to follow-up on questions and discuss business team reasons for process changes ➢ Collaborating with data architects, developers, network team and vendor Project Managers to evaluate benefit and feasibility of proposed changes ➢ Presenting findings to stakeholders via PowerPoint
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Cheryl has more than 15 years of experience in a liaison role. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing communication activities: ➢ **VMware upgrade, NASCO (2013 – 2014)** ➢ **New FTP Proxy server system, NASCO (2013 – 2014)** These projects involved the following tasks: ➢ Identifying impacted stakeholders ➢ Conducting Kick-off meeting with entire project team ➢ Presenting project scope and schedule ➢ Collecting primary contact data ➢ Conducting project meetings

Project Experience Summary	
4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs	Cheryl has more than 10 years of experience working with project team members to meet require performance metrics. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing collaborative activities: ➢ **VMware upgrade, NASCO (2013 – 2014)** ➢ **New FTP Proxy server system, NASCO (2013 – 2014)** These projects involved the following tasks: ➢ Discussing required usability and performance metrics with business team ➢ Collaborating with data architects, system architects, developers, and network teams to determine performance tradeoffs ➢ Presenting findings to business team for final decision
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Cheryl has more than 10 years of experience ensuring applications comply with laws and regulations. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing compliance enforcements : ➢ **ITS – Security Access using e-signature, GA Department of Revenue (2011)** ➢ **IVR data encryption, GA Department of Revenue (2011)** These projects involved the following tasks: ➢ Reviewing new laws or regulations pertaining to systems ➢ Sending issues for review to Executive management team ➢ Implementing required mandated changes
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency's needs.	Cheryl has more than 15 years of experience in creation of test plans, training materials, and execution of testing and training. Provided below is a sample list of key projects demonstrating Cheryl's experience in creation of test plans, training materials, and execution of testing and training : ➢ **BlueCross BlueShield servers update, Employer Name (2014)** ➢ **Asset Management system, NASCO (2012 – 2013)** These projects involved the following tasks: ➢ Collaborating with developers and business staff to determine test scenarios and appropriate pass/fail outcomes ➢ Ordering test scenarios so that testers will perform simple tasks first that will build into more complex tests ➢ Working with pilot testers to discuss and resolve all issues and concerns with test scenarios. Document test steps and screen shots. ➢ Creating training document or online training, and test plan ➢ Notifying testing team of testing schedule and expectations ➢ Monitoring testing process to answer any questions and ask testers for candid feedback

Project Experience Summary	
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Cheryl has more than 15 years of experience coordinating various project resources to ensure requirements are implemented as intended Provided below is a sample list of key projects demonstrating Cheryl's experience in performing requirements implementation: ➢ **VMware upgrade, NASCO (2013 – 2014)** ➢ **New FTP Proxy server system, NASCO (2013 – 2014)** These projects involved the following tasks: ➢ Identifying impacted stakeholders ➢ Conducting Kick-off meeting with entire project team ➢ Eliciting functional and non-functional requirements ➢ Creating project plans ➢ Receiving sign-off on requirements ➢ Executing implementation plan
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Cheryl has 10 years of experience with data cleansing and identifying issues that may affect data migration. Provided below is a sample list of key projects demonstrating Cheryl's experience in performing data cleansing and identifying issues that may affect data migration: ➢ **ITS Data cleansing, GA Department of Revenue (2010 – 2012)** ➢ **BlueCross BlueShield servers update, Employer Name (2014)** ➢ **Asset Management system, NASCO (2012 – 2013)** These projects involved the following tasks: ➢ Working with business staff to identify data issues and counts ➢ Working with developers to determine if data can be corrected programmatically ➢ Executing custom code to correct data prior to migration
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	➢ I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

2.3 Jennifer Khan – Business Analyst

2.3.1 Resume

Jennifer Khan

Qualifications

Jennifer is a business analyst with more than 5 years of diversified experience and successful implementations in Information Technology, involving in-depth understanding of Business Process Flows, Software Development Life Cycle, Process design, Business and functional requirements, Business case preparation, Development and Testing. She also possesses excellent written and oral communication skill and has previously served as a liaison between Insurance companies assisting on a health benefit exchange project. Additionally, Jennifer is well versed in software development methodologies and has extensive experience conducting and facilitating JAD sessions and developing business requirements.

Experience

- More than 5 years of experience involving business process flows, software development life cycle, process design
- More than 5 years of experience gathering and detailing business requirements
- More than 5 years of experience conducting and facilitating JAD sessions

Expertise

- Agile, RAD, RUP, SCRUM, and Waterfall Methodologies
- Health Benefit Exchange
- Medicaid
- ICD-10
- HIPAA 4010 & 5010

Professional Summary

2013 – Present	UPMC Health Plan
2012 – 2013	O.U. Medical Center
2010 – 2011	Aetna Health Insurance
2009 – 2010	Partners Healthcare

UPMC Health Plan – Pittsburg, PA *10/2013 - Present*

Business Analyst/Quality Analyst

UPMC Health Plan is owned by UPMC, one of the nation's top-ranked health systems. As part of an integrated health care delivery system, UPMC Health Plan partners with UPMC and community network providers to improve clinical outcomes as well as the health of the greater community.

Project: Health insurance claims process helps the company to process the claims on receiving it from the providers or a member. The claims are entered into the system. The claims department verifies the eligibility and determines if the claim is appropriate or inaccurate to process. If verification is flailed the claims is researched further for any missing or inaccurate data. Otherwise, the processing procedure is completed; checks and explanation of benefits (EOB) is sent to the member.

- Interacted with the department heads managers business customers, and business sponsors to gather requirements.

Jennifer Khan

- Communicated with us personnel across departments for verification, research processing, and audit to conduct a thorough analysis of the existing process.
- Created and maintained documentations for all the phases of system development
- Conducted joint application development sessions to review requirements.
- Involved in Medical Claims Analysis, Design, Implementation and Documentation.
- Perform walk-through of the business requirement document with the development team and QA teams.
- Ensured the consensus between the business and IT teams.
- Used SQL queries for access database before typing use cases for understanding different field names and character specification.
- Developed up use cases, activity diagrams, and sequence diagram using rational rose
- Ensured detailed and up-to-date features are included. Collaborated with the QA team to refine test plan and test cases.
- Conducted a gap analysis and traceability matrix to verify for the solution meet the business requirements.

Environment: Agile, SQL, Rec Pro, Rational Clear Quest, Rational Rose, UML, Windows XP, MS project, MS Word, MS Visio, MS excel.

O.U. Medical Center – Oklahoma City, OK *02/2012 – 08/2013*

Business Systems Analyst

OU Medical Center, including The Children's Hospital at OU Medical Center is Oklahoma's largest and most comprehensive hospital. It is located in the heart of Oklahoma City.

Project: The project was on Electronic Medical Record Management System. A Physician Support System was built to capture the outpatient clinical data using an Electronic Medical Record and Electronic Health Record Management System. The purpose of this system was to have a Paperless Medical Record and instant retrieval of data and laboratory records by the doctors, especially for Behavioral and Mental Health Record Systems. The patient's medical record contained information such as physical examination and information specific to the medical discipline. The system could also capture information about the patient's appointments with the doctors; the patient's medical summary and also track the flow of patients throughout the clinic.

- Collaborated with project stakeholders throughout all SDLC phases to ensure timely delivery of specified business solutions.
- Implemented the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system.
- Participated in the development of project plans, assessing business processes, working with business users and IT to develop system solutions and implementing solutions on a FACETS Platform
- Recognize scope limitations and raise potential scope issues while designing the best system approach.
- Worked with order management of products.
- Involved in making the Medicare patient profiles being compliant with the HIPAA regulations. Management of patient profile transfer (PPT) reports created by data team by verifying the associated data.
- Collected Business Requirements and converted them to Functional Requirements in the Facets Platform
- Extensively created test cases for the claims administration and customer service modules like subscriber/member enrollment, adding premium rates, claims, billing and recoveries. Third Party liabilities, benefits. Service authorizations, entity relations.
- Used Use Case diagrams during analysis to capture the requirements diagrams and Sequence diagrams so that the development team and other stake holders can understand the business process.

Environment: Windows 2000 server, MS Office, RUP, UML, Rational Rose, Power Designer, SQL

Jennifer Khan

Aetna Health Insurance – Hartford, CT *05/2010 – 12/2011*

Business Analyst

Aetna, Inc. is an American diversified health insurance company, providing a range of traditional and consumer directed health care insurance products and related services, including medical, pharmaceutical, dental, behavioral health, group life, long-term care, and disability plans, and medical management capabilities.

Project: As a Business Analyst in Aetna I performed pivotal role in multiple projects & handling three releases at the same time. Release 1 & 2 was web-based service application developed for streamlining office workflow processes involved in Electronic Data Interchange (EDI) transactions and benefits in claims management cycle. Release three was based on reporting the policy premium. There were seven reports, which were generated in Brio portal.

- Gather High Level Business Requirements (HLBRs) and Detail Level Business Requirements (DLBRs) from client and stakeholders through interview process.
- Coordinated virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements.
- Conduct Joint Application Design (JAD) sessions for communicating with all project sponsors and stakeholders.
- Developed test scenarios, test scripts and test cases based on the requirements.
- Involved in coordinating test schedules with developers and with project lead.
- Performed rigorous manual testing such as smoke testing, system integration testing.
- Logged defects using confirmations in MQC from SME's.
- Tested 4010/5010 conversion EDI transactions, 834, 837, 835, 270/271, 276/277, etc.
- Worked extensively with Members, Providers, Claims, Configuration, and Payment Modules of Facets.
- Analyzed the Facets Requirements/BRD's/Gap analysis, then prepared test scenarios and test cases.
- Conducted Validations Providers, Claims and Membership modules of Facets.
- Utilized Agile Methodology which emphasized on real time communication in a fast paced project environment.
- Tested the Case Management and Prior Authorization modules in Facets.
- Involved in Facets' Member creation and assignment testing.
- Worked extensively on 837 and 835 projects, business rules for X12 HIPAA 4010 and 5010 validation for loops, segments, elements, qualifiers and code sets.
- Testing for HIPAA 4010 and 5010 projects including legacy testing and HIPAA requirements and compliance mandates.
- Completed several HIPAA 4010 and 5010 Projects, included Medicaid including claims and enrollment testing as well as NPI and medical coding and ICD-9 EDI.

Environment: RUP, SQL, Oracle, UNIX and Windows NT, basic knowledge of QTP

Partners HealthCare – Boston, MA *01/2009 – 03/2010*

Business Analyst

Partners HealthCare is a non-profit organization founded by Brigham and Women's Hospital (BWH) and Massachusetts General Hospital (MGH).

Project: The project dealt with the single sign on application subsystem which was to move legacy system to continue membership migration to new platform and eventual retirement of legacy systems. Simultaneously also worked on Medigap project. Medigap is a Medicare supplement policies offered by Partners Health to the members with Original Medicare coverage and have worked towards designing of bill and improving customer

Jennifer Khan

experience.

- Prepared the Business requirement Document (BRD) and system requirement document (SRD) for the enhancement of the existing services.
- Created workflow diagrams, UML diagrams, process models, activity diagrams, use cases, for incorporating design changes in the system.
- Provided report analysis that differentiates both existing Medigap plans as well as the newly modernized Medigap plans.
- Differentiated enrolment between legacy plans and CPSS plans for enrolment and finance.
- Developed an automated approach for capturing all 837 data received that supports claim utilization and reporting.
- Worked with the business/functional unit to assist in the development, documentation, and analysis of functional and technical requirements within FACETS.
- Analyzed and designed reports for which source system was upgraded from Facets 2.96 to 4.61.
- Did gap analysis and impact analysis for the new Medicare PPO product.
- Developed business requirements for online pricing tool for Medigap product.
- Developed business requirement for online web form for capturing application information
- Designed system automation process for Facets system to auto releases the claims.
- Requirements Gathering & Analysis always ensured HIPAA Compliance Auditing.
- Extensively worked Claims, Enrollment, Eligibility verification for Members and Providers, benefits setup, and backend payment cycle.
- Worked with 276/277 transactions where exchange is used.
- Coordinated the upgrade of Transaction Sets 270, 271, 276, 277, 837, 835 to HIPAA compliance
- Conducted Risk Analysis to identify the risks associated with developing the patches, and formulated a Mitigation Plan to eliminate or reduce risks of high severity and any major effects.
- Conducted JAD sessions with business SMEs and developer.
- Collaborated with Quality Assurance Analyst in testing.
- Developed test cases and performed UAT testing for all the files and reports

Environment: Facets 4.31, 4.61, SQL Advantage, MS Visio, MS Word, ClearCase, ClearQuest, RUP

Education and Certifications

University of South Carolina, Masters in Public Health, Health Services Policy and Management

University of Dhaka Bangladesh, Bachelor of Medicine and Surgery

Relevant Skills

Software Development Methodologies: RUP, Agile, Waterfall

Requirements Management Tools: Requisite Pro

Requirements Visual Modeling Tools: Rational Rose, MS Visio, Smart Charts

Testing Tools: Win Runner7.0, Quality Center, Load Runner

Databases: Oracle 11, SQL Server, MS Access

Microsoft Technologies: MS office, MS Outlook, MS Project

Operating Systems: Windows 98/2000/XP, UNIX

2.3.2 References

Reference #1	
Start Date: 10/15/2013	**End Date**: 4/30/2015
Client Name: UPMC **Contact Name**: Karan Kalsaria **Title**: Team Lead **Phone**: 5713061311 **Email**: kalsaria@upmc.edu	
Description of Work Performed: Serving as the team lead for this project, and had the following project tasks and responsibilities: Interacted with the department heads managers business customers, and business sponsors to gather requirements, Created and maintained documentations, Developed up use cases, activity diagrams, and sequence diagrams, collaborated with the QA team to refine test plan and test cases, conducted a gap analysis and traceability matrix.	

Reference #2	
Start Date: 2/12/2012	**End Date**: 8/10/2013
Client Name: O.U. Medical Center **Contact Name**: Md. Sariful Islam **Title**: Manager **Phone**: (647) 686-4442 **Email**: mdsariful@yahoo.com	
Description of Work Performed: While managing this project had the following tasks and responsibilities: Collected Business Requirements and converted them to Functional Requirements, Collaborated with project stakeholders throughout all SDLC phases, Extensively created test cases.	

2.3.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Jennifer has more than 5 years of experience in Information Technology, involving in-depth understanding of Business Process Flows, Software Development Life Cycle, Process design, Business and functional requirements, Business case preparation, Development and Testing. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Interacting with the department heads, managers, business customers, and business sponsors to gather requirements ➢ She has communicated with personnel across departments for verification, research processing, and audit, to conduct a thorough analysis of the existing process ➢ She created and maintained documentations for all the phases of system development ➢ Conducted joint application development sessions to review requirements
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Jennifer has more than 5 years of experience reviewing documentation, procedures, and processes. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Interacting with the department heads, managers, business customers, and business sponsors to gather requirements ➢ She has communicated with personnel across departments for verification, research processing, and audit, to conduct a thorough analysis of the existing process ➢ She created and maintained documentations for all the phases of system development ➢ Conducted joint application development sessions to review requirements

Project Experience Summary	
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Jennifer more than 4 years of experience identifying and documenting business requirements. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Identifying, researching, and documenting new business requirements during ICD 9 to ICD 10 conversion while working at Aetna health insurance and UPMC health plan. ➢ Jennifer identified and documented new business requirements deriving from healthcare updates while working on Medigap project at Partners healthcare.
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Jennifer has more than 5 years of experience evaluating gathered information and reconciling any perceived conflicts. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Gathering High Level Business Requirements (HLBRs) and Detail Level Business Requirements (DLBRs) from client and stakeholders through interview process. ➢ Collaborating with project stakeholders throughout all SDLC phases to ensure timely delivery of specified business solutions. ➢ Implementing the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system. ➢ Interacting with the department heads, managers, business customers, and business sponsors to gather requirements.
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Jennifer has more than 5 years of experience communicating and collaborating with external and internal customers and analyzing needs, functional requirements and delivering documentation. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks:

Project Experience Summary	
	➢ Communicating with personnel across departments for verification, research processing, and audit to conduct a thorough analysis of the existing process. ➢ Involvement in Medical Claims Analysis, Design, Implementation and Documentation. ➢ Ensuring the consensus between the business and IT teams. ➢ Preparing the Business requirement Document (BRD) and system requirement document (SRD) for the enhancement of the existing services. ➢ Creating workflow diagrams, UML diagrams, process models, activity diagrams, use cases, for incorporating design changes in the system. ➢ Implementing the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system. ➢ Coordinating virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements. ➢ Conducting Joint Application Design (JAD) sessions for communicating with all project sponsors and stakeholders ➢ Conducting JAD sessions with business SMEs and developer. ➢ Analyzing and designing reports ➢ Creating and maintaining documentations for all the phases of system development
4.1.1.6 Work in multiple functional business areas simultaneously (“multi-task”)	Jennifer has more than 5 years of experience, working in multiple business areas at the same time. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Participated in the development of project plans, assessing business processes, working with business users and IT to develop system solutions and implementing solutions on a FACETS Platform ➢ Perform walk-through of the business requirement document with the development team and QA teams. ➢ Communicated with us personnel across departments for verification, research processing, and audit to conduct a thorough analysis of the existing process.

Project Experience Summary	
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Jennifer has more than 5 years of experience evaluating and determining reasons for process change requests. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Communicating with us personnel across departments for verification, research processing, and audit to conduct a thorough analysis of the existing process. ➢ Involvement in Medical Claims Analysis, Design, Implementation and Documentation. ➢ Ensuring the consensus between the business and IT teams. ➢ Preparing the Business requirement Document (BRD) and system requirement document (SRD) for the enhancement of the existing services. ➢ Creating workflow diagrams, UML diagrams, process models, activity diagrams, use cases, for incorporating design changes in the system. ➢ Implementing the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system. ➢ Coordinating virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements. ➢ Conducting Joint Application Design (JAD) sessions for communicating with all project sponsors and stakeholders ➢ Conducting JAD sessions with business SMEs and developer. ➢ Analyzing and designing reports ➢ Creating and maintaining documentations for all the phases of system development
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Jennifer has more than 2 years of experience serving as a liaison between various project stakeholders. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Collaborating with Quality Assurance Analyst in testing. ➢ Collaborating with project stakeholders throughout all SDLC phases to ensure timely delivery of specified business solutions.

Project Experience Summary	
4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs	Jennifer has more than 5 years of experience collaborating with project teams. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Collaborating with Quality Assurance Analyst in testing ➢ Collaborating with project stakeholders throughout all SDLC phases to ensure timely delivery of specified business solutions ➢ Participating in the development of project plans, assessing business processes, working with business users and IT to develop system solutions and implementing solutions on a FACETS Platform ➢ Recognizing scope limitations and raise potential scope issues while designing the best system approach ➢ Coordinating virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements ➢ Working with the business/functional unit to assist in the development, documentation, and analysis of functional and technical requirements within FACETS ➢ Ensuring the consensus between the business and IT teams

Project Experience Summary	
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Jennifer has more than 5 years of experience analyzing laws and regulations governing business and technical areas. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Communicating with us personnel across departments for verification, research processing, and audit to conduct a thorough analysis of the existing process. ➢ Involvement in Medical Claims Analysis, Design, Implementation and Documentation. ➢ Ensuring the consensus between the business and IT teams. ➢ Preparing the Business requirement Document (BRD) and system requirement document (SRD) for the enhancement of the existing services. ➢ Creating workflow diagrams, UML diagrams, process models, activity diagrams, use cases, for incorporating design changes in the system. ➢ Implementing the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system. ➢ Coordinating virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements. ➢ Conducting Joint Application Design (JAD) sessions for communicating with all project sponsors and stakeholders ➢ Conducting JAD sessions with business SMEs and developer. ➢ Analyzing and designing reports ➢ Creating and maintaining documentations for all the phases of system development

Project Experience Summary	
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency's needs.	Jennifer has more than 5 years of experience assisting in the creation of test plans and training materials. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Collaborating with Quality Assurance Analyst in testing. ➢ Developing test cases and performed UAT testing for all the files and reports ➢ Extensively created test cases for the claims administration and customer service modules like subscriber/member enrollment, adding premium rates, claims, billing and recoveries. Third Party liabilities, benefits. Service authorizations, entity relations. ➢ Developing test scenarios, test scripts and test cases based on the requirements. ➢ Analyzing the Facets Requirements/BRD's/Gap analysis, then prepared test scenarios and test cases. ➢ Involvement in Facets' Member creation and assignment testing. ➢ Creating, executing, and translating manual test cases and scenarios into automated test scripts in order to validate functional requirements using HP Quality stage. ➢ Ensuring detailed and up-to-date features are included. Collaborated with the QA team to refine test plan and test cases.
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Jennifer has more than 5 years of experience coordinating project resources ensuring that requirements are incorporated into project goals and implemented proposed. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Conducting JAD sessions with business SMEs and developer. ➢ Conducting joint application development sessions to review requirements. ➢ Ensuring the consensus between the business and IT teams.

Project Experience Summary	
	➢ Conducting a gap analysis and traceability matrix to verify for the solution meet the business requirements. ➢ Implementing the Rational Unified Process (RUP) methodology of iterative software development and developed user stories and dashboard for the system. ➢ Participating in the development of project plans, assessing business processes, working with business users and IT to develop system solutions and implementing solutions on a FACETS Platform ➢ Recognizing scope limitations and raising potential scope issues while designing the best system approach. ➢ Leveraging Use Case diagrams during analysis to capture the requirements diagrams and Sequence diagrams so that the development team and other stake holders can understand the business process. ➢ Conducting Joint Application Design (JAD) sessions for communicating with all project sponsors and stakeholders. ➢ Coordinating virtual Meetings with business clients, stakeholders, end users, various development teams and testers to discuss project progression and to gather requirements. ➢ Providing report analysis that differentiates both existing Medigap plans as well as the newly modernized Medigap plans. ➢ Working with the business/functional unit to assist in the development, documentation, and analysis of functional and technical requirements within FACETS. ➢ Interacting with the department heads, managers, business customers, and business sponsors to gather requirements.

Project Experience Summary	
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Jennifer has more than 5 years of experience assisting staff by supplying subject matter expertise aiding the identification and mitigation of project issues and risks. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **UPMC Health Plan (10/2013 – Present)** ➢ **O.U. Medical Center (02/2012 – 08/2013)** ➢ **Aetna Health Insurance (05/2010 – 12/2011)** ➢ **Partners HealthCare (01/2009 – 03/2010)** These projects involved the following tasks: ➢ Conducting Risk Analysis to identify the risks associated with developing the patches, and formulated a Mitigation Plan to eliminate or reduce risks of high severity and any major effects. ➢ Creating workflow diagrams, UML diagrams, process models, activity diagrams, use cases, for incorporating design changes in the system. ➢ Working with the business/functional unit to assist in the development, documentation, and analysis of functional and technical requirements within FACETS. ➢ Analysis and Design of existing transaction sets, and modification of these transaction sets to ensure HIPAA compliance. ➢ Participation in the development of project plans, assessing business processes, working with business users and IT to develop system solutions and implementing solutions on a FACETS Platform ➢ Recognizing scope limitations and raise potential scope issues while designing the best system approach
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	➢ I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

2.4 Rishiraj Kohli – Business Analyst

2.4.1 Resume

Rishiraj Kohli

Qualifications

Rishiraj serves as a Business Analyst with more than 7 years of experience. Rishiraj has extensive experience handling requirements management, business requirement documents, use case, functional, system design, and system requirement specifications, requirements traceability and business analysis. Additionally, Rishiraj has experience conducting Joint Application Development sessions, project meetings, and customer interviews and has an in depth understanding of the As-Is and To-Be processes. Rishiraj is highly experienced in leading and satisfying business needs and works effectively with project teams and stakeholders. Rishiraj displays effective analytical and problem solving skills and bring excellent communication skill to every engagement.

Experience

- More than 7 years of experience facilitating JAD sessions
- More than 5 years of business process modeling experience
- More than 7 years of business process reengineering experience

Expertise

- Business process reengineering
- Requirements management
- Business requirement development
- EDI and HIPAA
- JAD session facilitation
- Unified Modeling Language

Professional Summary

2013 – 2015	Trover Health
2011 – 2013	Discover Financial Services
2010 – 2011	General Dynamics
2007 – 2010	American Express

Trover Health – Louisville, KY ***07/2013 – 02/2015***

Business System Analyst

Trover Solutions provides managed care services targeted to government-sponsored health care programs, focusing on Medicaid and Medicare. The project involved gathering Business Requirements for the Claims Business Area and updating EDI Transactions like EDI 837, 835, 277 and 276 with the HIPAA 5010 Changes.

- Implemented new features like Provider Enrollment 270/271, Claim Status 276/277 and Prior Authorization 278 related to HIPAA EDI transactions.
- Created and maintained Different Requirement documents for Claims (837 EDI Transaction), Membership (834 EDI), and Facets Claim integration.
- Analyzed HIPAA 5010 related to 837 & 835 transactions and performed gap analysis between the 4010 and 5010.
- Written multiple Test Cases (System, Integration) for multiple transactions include 837I, 837P and 835 (both inbound and outbound) transactions.

Rishiraj Kohli

- Assisted BI developer to build and maintain SQL queries for data extraction and analysis and ETL through SSIS tool from SQL Server.
- Involved in developing existing data mapping by which each department can get accurate data from database. Involved in data analysis and data mapping activities creating ER diagrams and data flow diagrams for data model links as a part of data base management.
- Gathered users' stories by conducting meeting with various stakeholders, business users and end users with the help of project manager, product owner and facilitator.
- Analyzed users stories and separate them according to the preferences and prepared product backlog working with product owner and other SME.
- Prioritize user stories and assigned to different sprints.
- Facilitated daily scrum meetings and managed task board with user stories and board.
- Prepared and tracked burn down charts and velocity charts for timely delivery of projects.
- Prepared training manuals, schedules, training plan, test plan and scripts for **UAT.**
- Gathered end users' or customers' feedback according to the system and conducted retrospective meeting for continuous improvement if needed according to end users or customers.
- Assisted development team in preparing wire frames for validating designs by the stakeholders.
- Developed and maintained the **Requirement Traceability Matrix (RTM)** for the project deliverables using Rational Requirements Composer.

Environment: Agile (Scrum), MS Office Suits, MS Visio, MS SQL Server, MS Share Point, Rational Rose, Rational Clear Quest, Rational Requisite Pro, Rational Clear Case, SSIS, HPQC

Discover Financial Services – Chicago, IL	***03/2011 – 06/2013***

Business Analyst

Discover Financial Services (DFS) is a direct banking and payment services, best known for issuing Discover-brand credit cards, which are used by some 50 million members at more than 4 million retail and cash outlets. The project involved enhancing an online access system for Discover credit cards, wherein customers can login and view their account information, and view and monitor Spend Analyzer and cash back bonus rewards on their purchases.

- Interacted with the stakeholders by interviewing them, by preparing questionnaire and getting feedback.
- Communicated Project Requirements, Business Issues, Solution and made recommendation.
- Responsible for defining the scope of the project, gathering business requirements, doing gap analysis and documenting them textually or within models
- Analyzed and documented Business requirements and detail design of the software for full understanding of the business.
- Supported the assigned project manager with creating detailed project plans and assisting in developing, scheduling and tracking project timelines.
- Identified KPI aligning with business rules.
- Create Use Case using UML tools and Process Analysis tool such as Fishbone Diagram, and business process flow chart using MS Visio.
- Worked on different techniques of data masking techniques such as shuffling, substitution etc.
- Created use case scenarios and documented workflow and business process.
- Prepared the UML Use Cases using Rational Rose
- Used MS Visio for flow-charting, process model and architectural design of the application.

Rishiraj Kohli

- Documented business workflows textually as well as in UML diagrams according to RUP for the stakeholder review.
- Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly.

Environment: RUP, Rational Requisite Pro, Rational Rose, Visio, SQL 2008, UML Diagrams, Quality Control, Test Director.

General Dynamics (VIPS) – Towson, MD *08/2010 – 02/2011*

Senior Business Analyst

VIPS is a part of General Dynamic's health solutions group is an intelligent and highly cost effective solution that provides end-to-end functionalities required for Health Plan Enrollment, Hospital & Group Plan Management, Premium Calculations, Deductibles, Claims, Legacy Application Data Migration and integrates with any third-party Health Plan Insurance Provider Platforms. It is designed for enrolling and maintaining Commercial Health Plan members, MEDICARE & MEDICAID members (non-commercial). The application processes the customer data in sequential steps and consists of 4 sub-modules namely Enrollment, Premiums, Fulfillment, and Reports. The application is integrated with Java Based Rules Engine and heavily deals with Claims & Incentive Calculations, Electronic Payments, and Settlements for various individual health plans and State/Federal sponsored health plans.

- Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application.
- Worked on EDI transactions: 270, 271, 834, 835, and 837 (P.I.D) to identify key data set elements for designated record set. Interacted with Claims, Payments and Enrollment hence analyzing and documenting related business processes.
- Worked on HIPAA including Data mapping from ICD 9 to ICD 10.
- Experienced in EDI and HIPAA with multiple transactions involving Health care Benefits, claims handling and processing, with payer and provider experience (270 & 271, 276 & 277,820 837 P/I/D, 834, 835)
- Documented requirement for HIPAA, EDI transaction 837 and for Medicare Part A, Part B, Part C and Part D.
- Researched/Analyzed the various steps involved in claims processing life cycle and then wrote the BRD in such way that developers could understand the objective of the project
- Prepared release plan and iteration plan for the project working with the stakeholders as well as maintain the prioritized product backlog and Sprint backlogs.
- Worked with design team to prepare Project plan for User Interface documents where created various UI mockups, prototype, screen shot and non-functional requirement
- Coordinated with development team to help them better understand the requirements.
- Have an experience with Graphical User Interface (GUI)
- Worked with change control board to initiate/manage Change Requests, area of product identification, product lifecycle & product registration.
- Involved in gap analysis of claim processing with offshore team.
- Wrote test cases and test scripts for the User Acceptance Testing (UAT).
- Managed and created burn down charts for the Scrum process.
- Have an experience with data warehousing and data modeling.
- Prepared graphical depictions of Use Cases, Use Case Diagrams, Activity Diagrams, and Sequence Diagrams by using Microsoft Visio.
- Have worked with Data Warehousing with T-SQL including stored procedures, views, UDFs, triggers and joins
- Created traceability matrix to map requirements with test cases.

Rishiraj Kohli

Environment: Agile (Scrum), Rational Requirement Composer, Rational Team Concert, Rational Jazz, MS Office Suite, Microsoft SQL Server, MS Project, HPQC, iRise Studio, MS Visio

American Express – Charlotte, NC ***10/2007 – 07/2010***

Business Analyst

The project was on American Express Bank which Integrated On-Line Transaction Processing System (IOTPS) that includes credit card processing application. Their Online credit card processing system helps users to fill out a credit application online and get a decision in real time based on the information provided. Once the application is filled, the system sends the application to an underwriting component that communicates directly with the Bank and returns a response that is displayed in real time to the applicants. Based on existing forms and new requirement identification, system was defined and developed to retrieve customer data from American Express legacy systems, capture new data related to credit card services then connect to credit history agencies, propose different options for credit approval. The primary task of the project is to develop, maintain and enhance the project modules as per the client requirement.

- Effectively communicate project expectations, project goals and scope to the team.
- Facilitated team meetings to coordinate activities for project schedules, presented deliverables to the management, conducted to elicit requirements.
- Define, prioritize, and track requirements throughout the project lifecycle, software development teams are able to respond rapidly to ever-changing requirements without risking the project success.
- Perform analysis on project scope parameters (gap analysis, usability, cost /benefit etc.)
- Conducted JAD sessions with SMEs, system architects, technical teams and other stakeholders for open and pending issues
- Responsible for managing the documented system requirements and mapped using MS Excel for Requirements Traceability Matrix.
- Worked with developers in design/development activities in converting SSRS reports into the SQL database and manage all the electronic records in the system.
- Managed requirements to minimize scope issues. Understand all systems requirements within deliverable and provide feedback, collected requirements from customers, users and prioritized them.
- Prepared Business Process Models that includes modeling of all the activities of the business from the conceptual to procedural level. Followed top down, leveled technique for building Business Process Models.
- Insure project deliverables are on time and on budget while meeting customer satisfaction expectations
- Performed gap analysis between current performance and desired performance (i.e. critical customer requirements)
- Developed Test Requirements Matrix using Traceability
- Wrote test cases for functional testing and integration testing
- Examined, analyzed and modeled Test plans, Test Scripts, Use Case Model cases & Test procedures based on RUP methodology.
- Tracked reviewed analyzed and compared defects using test director
- Designed Developed and managed QA process
- Collaborated with Quality Assurance Analyst in Automated Regression testing and black box testing using Mercury's Win Runner.
- Responsible for integration testing, functional testing, white box testing and system testing (Manual)

Rishiraj Kohli

- Wrote clear, concise detailed system requirements specification (SRS) documents and user documentation in accordance to guidelines and standards of a level where developers can interpret, design and develop the application with minimum guidance.
- Presented management reports to the project manager in handling whole project
- Create Wireframes using MS Visio

Environment: UML, SQL Server, Load Runner, Win Runner, Quality Center, Microsoft Dynamics, Lotus Notes, Windows NT, OOAD, Java Script, Dashboard, Rational Suite, MS Access, MS Project, MS Visio, Visual Basic and Test Director.

Education and Certifications

Franklin University, Master of Business Administration in Finance/Healthcare Management

Kelley School of Business, Master of Science in Accounting and Finance

DAVV University, Bachelors in Business Management

Relevant Skills

- **Operating System:** Windows 2003 Server, Windows 8/7/Vista/XP/2000/NT/98
- **Testing Tools:** HPQC, Win Runner, Load Runner
- **Bug Tracking Tools:** Clear Quest
- **Front-End Tools:** Adobe Photoshop, MS Excel, MS Office, MS Project
- **Languages:** C, C++, SQL, TSL, Visual Basic
- **BI Tools:** SSIS, SSRS
- **Requirements Management:** Rational Requisite Pro, Caliber RM
- **Modeling Tools:** MS Visio, Rational Rose, Caliber RDM, Snag IT
- **Project Management Tools:** MS Project, SharePoint 2007/2010/13, JIRA, Primavera
- **Web Tech:** HTML, UML, Macromedia Dreamweaver, Wirefram, iRise
- **Methodologies (SDLC):** Scrum, Agile, Rational Unified Process (RUP), Waterfall Model
- **Database:** Oracle, MS SQL Server, MS Access

2.4.2 References

Reference #1	
Start Date: 07/2013	**End Date**: 02/2015
Client Name: Trover Health **Contact Name**: Dishant Daryani **Title**: Senior Developer **Phone**: 309-621-1646 **Email**: ddaryani@troversolutions.com	
Description of Work Performed: Serving as Business System Analyst performed the following project tasks and responsibilities: Interacted with the stakeholders by interviewing them, Communicated Project Requirements and Business Issues, performed a gap analysis, analyzed and documented business requirements, created Use Cases, conducted JAD sessions allowing stakeholders to communicate their perspectives with each other, resolved any issues quickly.	

Reference #2	
Start Date: 03/2011	**End Date**: 06/2013
Client Name: Discover Financial Services **Contact Name**: Manu Gemini **Title**: Project Manager **Phone**: 480-287-4838 **Email**: manu.gemini@us.pwc.com	
Description of Work Performed: Serving as Business Analyst performed the following project tasks and responsibilities: Created and maintained different requirement documents for Claims, wrote multiple Test Cases, analyzed users stories and separated them according to the preferences, facilitated daily scrum meetings, prepared training manuals, schedules, training plan, test plan and scripts for UAT, developed and maintained the Requirement Traceability Matrix.	

2.4.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Rishiraj has more than 7 years of experience in business process reengineering, documenting workflow and business processes, developing process models, and gathering business requirements. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ More than 7 years of business process reengineering experience ➢ Create Use Case using UML tools and Process Analysis tool such as Fishbone Diagram, and business process flow chart using MS Visio. ➢ Worked on different techniques of data masking techniques such as shuffling, substitution, etc. ➢ Created use case scenarios and documented workflow and business process. ➢ Prepared the UML Use Cases using Rational Rose ➢ Used MS Visio for flow-charting, process model and architectural design of the application. ➢ Documented business workflows textually as well as in UML diagrams according to RUP for the stakeholder review. ➢ The project involved gathering Business Requirements for the Claims Business Area and updating EDI Transactions like EDI 837, 835, 277 and 276 with the HIPAA 5010 Changes. ➢ Involved in data analysis and data mapping activities creating ER diagrams and data flow diagrams for data model links as a part of data base management.

Project Experience Summary	
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Rishiraj has more than 7 years of experience analyzing and documenting business requirements and detailed design documents. Rishiraj has also performed Gap Analyses to determine gaps between current and desired performance, as well as analyzing the claims processing life cycle and facilitating JAD sessions to understand and be conversant on business processes and procedures. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ The project involved gathering Business Requirements for the Claims Business Area and updating EDI Transactions like EDI 837, 835, 277 and 276 with the HIPAA 5010 Changes. ➢ Analyzed and documented Business requirements and detail design of the software for full understanding of the business. ➢ Performed gap analysis between current performance and desired performance (i.e. critical customer requirements) ➢ Researched/Analyzed the various steps involved in claims processing life cycle and then wrote the BRD in such way that developers could understand the objective of the project ➢ Coordinated with development team to help them better understand the requirements. ➢ Worked with change control board to initiate/manage Change Requests, area of product identification, product lifecycle & product registration. ➢ Managed requirements to minimize scope issues. Understand all systems requirements within deliverable and provide feedback, collected requirements from customers, users and prioritized them. ➢ Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application.

Project Experience Summary	
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Rishiraj has more than 5 years of experience managing requirements to minimize scope issues. When scope issues arise, Rishiraj brings experience effectively communicating new project expectations and goals, performing gap analyses between as-is and to-be requirements, and gathering and managing new requirements appropriately. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Discover Financial (03/2011 – 06/2013)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Managed requirements to minimize scope issues. Understand all systems requirements within deliverable and provide feedback, collected requirements from customers, users and prioritized them. ➢ Effectively communicate project expectations, project goals and scope to the team. ➢ Perform analysis on project scope parameters (gap analysis, usability, cost /benefit etc.) ➢ Responsible for defining the scope of the project, gathering business requirements, doing gap analysis and documenting them textually or within models

Project Experience Summary	
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Rishiraj has more than 7 years of experience conducting and facilitating JAD sessions with SMEs, vendors, and development managers to understand business processes, gather user stories and identify opportunities for enhancement. Rishiraj has vast experience defining, prioritizing, and tracking requirements throughout the project life cycle, as well as analyzing user stories in order to separate business needs from user wishes. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Gathered users' stories by conducting meeting with various stakeholders, business users and end users with the help of project manager, product owner and facilitator. ➢ Analyzed users' stories and separated them according to the preferences and prepared product backlog working with product owner and other SME. ➢ Facilitated daily scrum meetings and managed task board with user stories and board. ➢ Prioritize user stories and assigned to different sprints. ➢ Interacted with the stakeholders by interviewing them, by preparing questionnaire and getting feedback. ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly. ➢ Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application. ➢ Define, prioritize, and track requirements throughout the project lifecycle, software development teams are able to respond rapidly to ever-changing requirements without risking the project success.

Project Experience Summary	
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Rishiraj has more than 7 years of experience interacting with and interviewing stakeholders to determine requirements, business needs and make solution recommendations. Extensive experience developing project documentation, including, but not limited to, requirements documentation, Requirements Traceability Matrices (RTM), user stories, and use cases. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Created and maintained Different Requirement documents for Claims (837 EDI Transaction), Membership (834 EDI), and Facets Claim integration. ➢ Developed and maintained the Requirement Traceability Matrix (RTM) for the project deliverables using Rational Requirements Composer. ➢ Interacted with the stakeholders by interviewing them, by preparing questionnaire and getting feedback. ➢ Communicated Project Requirements, Business Issues, Solution and made recommendation. ➢ Responsible for defining the scope of the project, gathering business requirements, doing gap analysis and documenting them textually or within models ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, ➢ Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application. ➢ Effectively communicate project expectations, project goals and scope to the team. ➢ Conducted JAD sessions with SMEs, system architects, technical teams and other stakeholders for open and pending issues

Project Experience Summary	
4.1.1.6 Work in multiple functional business areas simultaneously ("multi-task")	Rishiraj has more than 7 years of experience, working in multiple functional business areas simultaneously, such as the Claims, Payments, and Enrollment areas. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Implemented new features like Provider Enrollment 270/271, Claim Status 276/277 and Prior Authorization 278 related to HIPAA EDI transactions. ➢ Created and maintained Different Requirement documents for Claims (837 EDI Transaction), Membership (834 EDI), and Facets Claim integration. ➢ Worked on different techniques of data masking techniques such as shuffling, substitution etc. ➢ Worked on EDI transactions: 270, 271, 834, 835, and 837 (P.I.D) to identify key data set elements for designated record set. Interacted with Claims, Payments and Enrollment hence analyzing and documenting related business processes. ➢ Worked with change control board to initiate/manage Change Requests, area of product identification, product lifecycle & product registration. ➢ Define, prioritize, and track requirements throughout the project lifecycle, software development teams are able to respond rapidly to ever-changing requirements without risking the project success.
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Rishiraj has more than 2 years of experience evaluating and determining reasons for process change requests and evaluating if the proposed changes should be implemented and at what cost. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** These projects involved the following tasks: ➢ The project involved gathering Business Requirements for the Claims Business Area and updating EDI Transactions like EDI 837, 835, 277 and 276 with the HIPAA 5010 Changes. ➢ Worked with change control board to initiate/manage Change Requests, area of product identification, product lifecycle & product registration.

Project Experience Summary	
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Rishiraj has more than 7 years of experience serving as a liaison between internal and external stakeholders and customers. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Created and maintained Different Requirement documents for Claims (837 EDI Transaction), Membership (834 EDI), and Facets Claim integration. ➢ Developed and maintained the Requirement Traceability Matrix (RTM) for the project deliverables using Rational Requirements Composer. ➢ Interacted with the stakeholders by interviewing them, by preparing questionnaire and getting feedback. ➢ Communicated Project Requirements, Business Issues, Solution and made recommendation. ➢ Responsible for defining the scope of the project, gathering business requirements, doing gap analysis and documenting them textually or within models ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, ➢ Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application. ➢ Effectively communicate project expectations, project goals and scope to the team. ➢ Conducted JAD sessions with SMEs, system architects, technical teams and other stakeholders for open and pending issues

<table>
<tr><th colspan="2">Project Experience Summary</th></tr>
<tr><td>4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs</td><td>Rishiraj has more than 7 years of experience collaborating with project teams. Rishiraj brings extensive experience conducting JAD sessions and meeting with various project teams to determine the tradeoffs between usability and performance needs.

Provided below is a list of projects demonstrating his experience with this requirement:
➢ Trover Health (07/2013 – 02/2015)
➢ Discover Financial Services (03/2011 – 06/2013)
➢ General Dynamics (VIPS) (08/2010 – 02/2011)
➢ American Express (10/2007 – 07/2010)

These projects involved the following tasks:
➢ Assisted development team in preparing wire frames for validating designs by the stakeholders.
➢ Coordinated with development team to help them better understand the requirements.
➢ Worked with change control board to initiate/manage Change Requests, area of product identification, product lifecycle & product registration.
➢ Worked with design team to prepare Project plan for User Interface documents where created various UI mockups, prototype, screen shot and non-functional requirement
➢ Facilitated team meetings to coordinate activities for project schedules, presented deliverables to the management, conducted to elicit requirements.
➢ Conducted JAD sessions with SMEs, system architects, technical teams and other stakeholders for open and pending issues
➢ Managed requirements to minimize scope issues. Understand all systems requirements within deliverable and provide feedback, collected requirements from customers, users and prioritized them.
➢ Prepared Business Process Models that includes modeling of all the activities of the business from the conceptual to procedural level. Followed top down, leveled technique for building Business Process Models.</td></tr>
</table>

Project Experience Summary	
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Rishiraj has more than 7 years of experience analyzing laws and regulations that govern business or technical areas, such as HIPAA and other laws governing EDI transactions. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Implemented new features like Provider Enrollment 270/271, Claim Status 276/277 and Prior Authorization 278 related to HIPAA EDI transactions. ➢ The application is integrated with Java Based Rules Engine and heavily deals with Claims & Incentive Calculations, Electronic Payments, and Settlements for various individual health plans and State/Federal sponsored health plans. ➢ Worked on EDI transactions: 270, 271, 834, 835, and 837 (P.I.D) to identify key data set elements for designated record set. Interacted with Claims, Payments and Enrollment hence analyzing and documenting related business processes. ➢ Experienced in EDI and HIPAA with multiple transactions involving Health care Benefits, claims handling and processing, with payer and provider experience (270 & 271, 276 & 277,820 837 P/I/D, 834, 835) ➢ Documented requirement for HIPAA, EDI transaction 837 and for Medicare Part A, Part B, Part C and Part D. ➢ Define, prioritize, and track requirements throughout the project lifecycle, software development teams are able to respond rapidly to ever-changing requirements without risking the project success. ➢ Supported the assigned project manager with creating detailed project plans and assisting in developing, scheduling and tracking project timelines. ➢ Identified KPI aligning with business rules.

Project Experience Summary	
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency's needs.	Rishiraj has more than 7 years of experience in the creation of test plans and training materials and in the execution of testing and training. Rishiraj brings experience writing multiple test cases, preparing training manuals, schedules, training plans, test plans, and test scripts for UAT, as well as writing test cases for functional and integration testing. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Written multiple Test Cases (System, Integration) for multiple transactions include 837I, 837P and 835 (both inbound and outbound) transactions. ➢ Prepared training manuals, schedules, training plan, test plan and scripts for UAT. ➢ Wrote test cases and test scripts for the User Acceptance Testing (UAT). ➢ Created traceability matrix to map requirements with test cases. ➢ Developed Test Requirements Matrix using Traceability ➢ Wrote test cases for functional testing and integration testing ➢ Examined, analyzed and modeled Test plans, Test Scripts, Use Case Model cases & Test procedures based on RUP methodology. ➢ Tracked reviewed analyzed and compared defects using test director ➢ Collaborated with Quality Assurance Analyst in Automated Regression testing and black box testing using Mercury's Win Runner. ➢ Responsible for integration testing, functional testing, white box testing and system testing (Manual) ➢ Wrote clear, concise detailed system requirements specification (SRS) documents and user documentation in accordance to guidelines and standards of a level where developers can interpret, design and develop the application with minimum guidance.

Project Experience Summary	
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Rishiraj has more than 7 years of experience coordinating project resources ensuring that requirements are incorporated into project goals and implemented proposed. Rishiraj brings extensive experience defining, prioritizing, and tracking requirements throughout the project life cycle so that development teams are able to respond rapidly to ever-changing requirements without risk to the project success. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Gathered users' stories by conducting meeting with various stakeholders, business users and end users with the help of project manager, product owner and facilitator. ➢ Analyzed user stories and separate them according to the preferences and prepared product backlog working with product owner and other SME. ➢ Facilitated daily scrum meetings and managed task board with user stories and board. ➢ Prioritize user stories and assigned to different sprints. ➢ Interacted with the stakeholders by interviewing them, by preparing questionnaire and getting feedback. ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly. ➢ Facilitated JAD sessions with SMEs', Product owner, and Development managers to understand the business process, gathered user stories and identify enhancements for the application. ➢ Define, prioritize, and track requirements throughout the project lifecycle, software development teams are able to respond rapidly to ever-changing requirements without risking the project success.

Project Experience Summary	
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Rishiraj has more than 7 years of experience assisting staff by supplying subject matter expertise aiding the identification and mitigation of project issues and risks. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Trover Health (07/2013 – 02/2015)** ➢ **Discover Financial Services (03/2011 – 06/2013)** ➢ **General Dynamics (VIPS) (08/2010 – 02/2011)** ➢ **American Express (10/2007 – 07/2010)** These projects involved the following tasks: ➢ Developed and maintained the Requirement Traceability Matrix (RTM) for the project deliverables using Rational Requirements Composer. ➢ Supported the assigned project manager with creating detailed project plans and assisting in developing, scheduling and tracking project timelines. ➢ Data Migration and integrates with any third-party Health Plan Insurance Provider Platforms. ➢ Coordinated with development team to help them better understand the requirements. ➢ Tracked reviewed analyzed and compared defects using test director ➢ Designed Developed and managed QA process
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

2.5 Sharadh Sethuraju – Business Analyst

2.5.1 Resume

Sharadh Chandran Sethuraju

Qualifications

Sharadh is an experienced Business Analyst with over six years eliciting and evaluating the quality of business requirements. Sharadh has excellent interpersonal, communication and presentation skills and has been involved in high interaction with variety of audiences (PMs, technical specialists, developers, architects, SMEs). Sharadh has an excellent ability to multi-task on projects consisting of diverse sets of people, platforms and parallel timelines via exceptional communication, organizational and interpersonal skills. In addition, Sharadh is adept at Conflict Resolutions, Negotiations, and Relationship Management.

Experience

- Six years as a business analyst
- Over six years testing applications

Expertise

- Elicitation and analysis of business requirements
- Requirements traceability matrices
- Developing and executing Test Cases and Test Scripts from Business Requirements
- User Acceptance Testing
- Use Case and Business Process Models
- Training materials and conducting training sessions
- Waterfall and Agile Methodologies

Professional Summary

2014 – Present	Bank of America
2012 – 2013	JP Morgan Chase
2010 – 2012	Great West Financial
2009 – 2010	Fannie Mae
2006 – 2009	Sun Financials

Bank of America – San Francisco, CA ***09/2014 – Present***

Senior Business Analyst

- Serving as a Business Analyst (BA) to develop a Fund/Investor Data Warehouse.
- Participating in identifying the User requirements by working with number of key individuals from business and information technology.
- Developing Business Requirements Documents (using MS Office suite) and communicating them to the build team.
- Creating and maintaining project plans and contributing to projects being on schedule and meeting client needs.
- Creating project plan, schedule and implementing project milestones.
- Preparing and tracking project plans from project inception to completion.
- Managing day-to-day individual workload, monitor milestones and critical dates
- Conducting research and performing basic analysis of demographics, products and business lines.

Sharadh Chandran Sethuraju

- Performing ad hoc analysis of business situations, issues and problems.
- Creating detailed Use Cases Scenarios and Modeling Use Cases Diagrams in MS Visio.
- Performing feasibility analysis, GAP Analysis on AS-IS and TO-BE processes.
- Documenting the business needs in the Business Requirements document.
- Writing SQL queries to validate source data versus data in the Data warehouse including identification of duplicate records.
- Highly skilled in creating, writing, and executing Test Cases, Test Scripts from Business User Requirement documents and Functional Design Documents.
- Participating in User Acceptance Testing (UAT).

JP Morgan Chase – New York, NY	***06/2012 – 08/2013***

Senior Business Analyst

- Served as Business Analyst to oversee the Data Normalization and IST testing process, evaluating the quality of the data and content before prior to data load.
- Acted as the Liaison between Line of Businesses (LOBs), Technology Partners (Source Applications) and implementation team.
- Participated in BRD review meetings to provide knowledge and Expertise on Anti Money Laundering (AML) Initiatives and AML deliverables.
- Represented the Financial Crimes Transaction Monitoring (FCTM) team in EMEA LATAM and APAC meetings to discuss and plan of delivering an efficient Enterprise Anti Money Laundering application.
- Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements.
- Gathered and Coordinated Business requirements and converted them into appropriate functional requirements.
- Coordinated daily meetings to discuss the outcome of implementation processes, testing efforts, time lines etc. Provided Guidance and Leadership as needed.
- Lead the Prepaid Team in IST Testing, Defect Remediation and Solution Delivery. Acted as the SME on all prepaid related matters including the Interface Specification. Operated as prepaid interface product owner and gatekeeper.
- Created reporting metrics for daily team meetings and executive meetings on behalf of the Transaction Monitoring and Investigations (TMI) unit.
- Maintained and created Enterprise wide test cases for SME Testing, Oracle Mantas testing and Integrated Systems Testing (IST).
- Lead both on shore and offshore teams to deliver Business solutions in a timely and efficient manner.

Great West Financial – Greenwood Village, CO	***12/2010 – 05/2012***

Business Analyst

- Serving as a Business Analyst, enhanced the Great West's client portal, making it more efficient, expandable and providing a great customer experience.
- Gathered requirements from Business Line Mangers and SMEs for the redesigned Great West Client Portal, Client Database and to digitize the Transactions.
- Performed system and document analysis to understand the current systems.
- Developed Process Models and detailed Business Policies and documented the same in Business Requirement

Sharadh Chandran Sethuraju

Documents.

- Prepared High Level Process Flow Diagrams and Business Process Flow diagrams for Great West Client Portal functionalities in Visio.
- Developed Use Case diagrams, Use case Narratives and User Stories.
- Prepared Wireframes, Prototypes and Mock up screens for different web pages.
- Developed Customer Database Mapping Document and Digital Transactions Mapping Document to map all Policy Administration Systems.
- Identified the required fields for the Client Database from Client extracts and Contract extracts from different Policy Administration Systems.
- Coordinated with offshore team in documenting the gathered Requirements in to BRD's and FRD's.
- Developed Service Mapping Documents to map UI Literals to Administration Systems.
- Helped developers understand Business Requirements and design for Graphical User Interface (GUI), Client Database and Digitize Transactions.
- Coordinated with QA team to determine and develop Test Plans, Test Cases and methods for Unit Testing, Integration and Functional Testing based on testing requirements.
- Participated in User Acceptance Testing (UAT) and developed Training Manuals.
- Performed data validation using SQL queries and ran ad-hoc queries for verification by the business users.

Fannie Mae – New York ***03/2009 – 11/2010***

Business Analyst

- As a Business Analyst, contributed to development of the Loan Origination System and composite web-based Loan Operation System.
- Worked as a Business Analyst to support the development of the Online Account Project.
- Met with users and stakeholders to understand the problem domain, gathered customer requirements through surveys, interviews (group and one-on-one) along with JAD sessions.
- Created business use case, functional (FRS) and technical specifications for Payment system.
- Applied Unified Modeling Language (UML) methodology to create use case diagrams in MS Visio.
- Provided data modeling support for numerous strategic application development projects.
- Played active and lead role in gathering, analyzing, and writing business requirements, creating work flow diagrams.
- Developed, derived and clarified specifications for system related projects to ensure business unit needs are identified and communicated and to ensure technical programmers understand the functional requirements of the business unit.
- Conferred periodically with both business unit and technical programmers throughout the lifecycle of assigned projects to track progress.
- Bridged communication between the client and the project team.
- Developed requirement reports on day-to-day basis.
- Excellent ability to multi-task on project consisting of diverse sets of people, platforms and parallel timelines via exceptional communication, organizational and interpersonal skills.
- Developed test scenarios and implemented test plan.
- Performed User Acceptance testing.
- Designed the UI (web interface) of the application, along with prototyping.
- Resolved issues and improvised the process to ensure a stable and accurate solution.

Sharadh Chandran Sethuraju

- Worked with financial services as part of support for the application.

Sun Financials – Mumbai, India ***03/2006 – 02/2009***

Associate Business Analyst

- Participated in development of a strong database to cater to the ever growing demand of relevant data for clients due to exponentially increasing online usage of banking services.
- Coordinated with the Business Users, Subject Matter Experts (SME's) and Stakeholders to identify and analyze the Business Requirements.
- Analyzed the essential business elements, detailed definitions and description of the relationship among the various business processes and documented them in Business Requirement Document (BRD).
- Documented requirements and prepared Functional Requirements Document (FRD).
- Designed and developed Use Case Diagrams and Entity Diagrams to define the Business Process.
- Studied the Data Entity Relationships and worked on multiple short term projects during the tenure as needed.
- Helped facilitate Joint Application Design (JAD) sessions allowing clients across the board to communicate with each other, resolve problems and assist in loan servicing.

Education and Certifications

Hult International Business School, Master of Business Administration, Project Management

Valliammai Engineering College, Bachelor of Technology, Information Technology

Relevant Skills

- **Microsoft Office Tools:** Word, Excel, Access, PowerPoint, Visio
- **Collaboration & Content/Knowledge Management Tools:** SharePoint, WebEx, Lync
- **Project Management Tools:** Microsoft Project
- **Requirements Development and Management:** Rational Requisite Pro, Clear Quest, Clear Case , JIRA
- **Database Tools:** Oracle, TOAD
- **Development Languages:** UML, SQL
- **Methodologies:** Rup, Agile, Waterfall
- **Operating Systems:** MS Windows 2000/NT/98/XP
- **Testing and Quality Management:** Rational Test Manager, Rational Functional Tester, test plan development, test case development, manual and automated test execution, User Acceptance Testing

2.5.2 References

Reference #1	
Start Date: 6/2012	**End Date**: 8/2013
Client Name: Tia Creff (Telecom Domain) **Contact Name**: Anil Paladugu (now works for Tia Creff) **Title**: Project Manager (at JP Morgan Chase) **Phone**: 9738267787 **Email**: apaladugu@tiaacref.org	
Description of Work Performed: Served as Business Analyst overseeing the Data Normalization and IST testing process, evaluating the quality of the data and content before prior to data load. Additional project responsibilities included Serving as a liaison between multiple teams, participating in requirement development sessions, working with subject matter experts to gain further project knowledge, maintaining test cases, and coordinating daily meetings to discuss the project status.	

Reference #2	
Start Date: 9/2014	**End Date**: Present
Client Name: Bank of America **Contact Name**: Anandam Chindam **Title**: QA Lead **Phone**: 469 767 1314 **Email**: anandam.chindam@bankofamerica.com	
Description of Work Performed: Served as a Business Analyst developing a Fund/Investor Data Warehouse. Project responsibilities included: participating in identifying the user requirements, developing business requirements documents, creating and maintaining project plans, conducting research and performing basic analysis, creating detailed use cases scenarios, participating in user acceptance testing.	

2.5.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Sharadh has over 6 years of experience analyzing and defining business objectives and strategies involving business process reengineering. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Developing Business Requirements Documents (using MS Office suite) and communicating them to the build team. ➢ Conducting research and performing basic analysis of demographics, products and business lines. ➢ Performing ad hoc analysis of business situations, issues and problems. ➢ Documenting the business needs in the Business Requirements document. ➢ Participated in BRD review meetings to provide knowledge and Expertise on Anti Money Laundering (AML) Initiatives and AML deliverables. ➢ Gathering and Coordinating Business requirements and converted them into appropriate functional requirements. ➢ Played an active and lead role in gathering, analyzing, and writing business requirements, creating work flow diagrams. ➢ Prepared High Level Process Flow Diagrams and Business Process Flow diagrams for Great West Client Portal functionalities in Visio.
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Sharadh has over 6 years of experience reviewing documentation, procedures, and processes leveraging the knowledge from that analysis to drive project work. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)**

Project Experience Summary	
	These projects involved the following tasks: ➢ Played an active and lead role in gathering, analyzing, and writing business requirements, creating work flow diagrams. ➢ Writing SQL queries to validate source data versus data in the Data warehouse including identification of duplicate records. ➢ Coordinating daily meetings to discuss the outcome of implementation processes, testing efforts, time lines etc. Provided Guidance and Leadership as needed. ➢ Preparing High Level Process Flow Diagrams and Business Process Flow diagrams for Great West Client Portal functionalities in Visio. ➢ Conducting research and performing basic analysis of demographics, products and business lines.
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Sharadh has over 6 years of experience identifying and documenting new business requirements related to any project specific changes or changes in state or federal legislation. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Creating and maintaining project plans and contributing to projects being on schedule and meeting client needs. ➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements. ➢ Played an active and lead role in gathering, analyzing, and writing business requirements, creating work flow diagrams. ➢ Analyzed the essential business elements, detailed definitions and description of the relationship among the various business processes and documented them in Business Requirement Document (BRD). ➢ Documented requirements and prepared Functional Requirements Document (FRD).

Project Experience Summary	
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Sharadh has over 6 years of experience evaluating information from multiple sources and communicating and resolving any conflicts or inconsistencies in the information. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Participating in identifying the User requirements by working with number of key individuals from business and information technology. ➢ Developing Business Requirements Documents (using MS Office suite) and communicating them to the build team. ➢ Highly skilled in creating, writing, and executing Test Cases, Test Scripts from Business User Requirement documents and Functional Design Documents. ➢ Acted as the Liaison between Line of Businesses (LOBs), Technology Partners (Source Applications) and implementation team. ➢ Participated in BRD review meetings to provide knowledge and Expertise on Anti Money Laundering (AML) Initiatives and AML deliverables. ➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements. ➢ Gathered and Coordinated Business requirements and converted them into appropriate functional requirements. ➢ Gathered requirements from Business Line Mangers and SMEs for the redesigned Great West Client Portal, Client Database and to digitize the Transactions. ➢ Created business use case, functional (FRS) and technical specifications for Payment system. ➢ Developed Use Case diagrams, Use case Narratives and User Stories. ➢ Met with users and stakeholders to understand the problem domain, gathered customer requirements through surveys, interviews (group and one-on-one) along with JAD sessions. ➢ Prepared High Level Process Flow Diagrams and Business Process Flow diagrams for Great West Client Portal functionalities in Visio.

Project Experience Summary	
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Sharadh has over 6 years of experience communicating and collaborating with internal and external teams, stakeholders, and customers in order to gather and deliver necessary project information and documentation. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Participating in identifying the User requirements by working with number of key individuals from business and information technology. ➢ Acted as the Liaison between Line of Businesses (LOBs), Technology Partners (Source Applications) and implementation team. ➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements. ➢ Lead the Prepaid Team in IST Testing, Defect Remediation and Solution Delivery. Acted as the SME on all prepaid related matters including the Interface Specification. ➢ Lead both on shore and offshore teams to deliver Business solutions in a timely and efficient manner. ➢ Gathered requirements from Business Line Mangers and SMEs for the redesigned Great West Client Portal, Client Database and to digitize the Transactions. ➢ Coordinated with offshore team in documenting the gathered Requirements in to BRD's and FRD's. ➢ Coordinated with QA team to determine and develop Test Plans, Test Cases and methods for Unit Testing, Integration and Functional Testing based on testing requirements. ➢ Met with users and stakeholders to understand the problem domain, gathered customer requirements through surveys, interviews (group and one-on-one) along with JAD sessions. ➢ Helped facilitate Joint Application Design (JAD) sessions allowing clients across the board to communicate with each other, resolve problems, and assist in loan servicing. ➢ Coordinated with the Business Users, Subject Matter Experts (SME's) and Stakeholders to identify and analyze the Business Requirements.

Project Experience Summary	
4.1.1.6 Work in multiple functional business areas simultaneously ("multi-task")	Sharadh has over 6 years of experience working in multiple business areas simultaneously and has shown the ability to effectively multi-task. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financial (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Preparing and tracking project plans from project inception to completion. ➢ Managing day-to-day individual workload, monitor milestones and critical dates ➢ Lead the Prepaid Team in IST Testing, Defect Remediation and Solution Delivery. Acted as the SME on all prepaid related matters including the Interface Specification. Operated as prepaid interface product owner and gatekeeper. ➢ Excellent ability to multi-task on project consisting of diverse sets of people, platforms and parallel timelines via exceptional communication, organizational and interpersonal skills.
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Sharadh has over 6 years of experience determining reasoning for process change requests and evaluating if requests should be implemented and the financial impact of the request. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Performing ad hoc analysis of business situations, issues and problems. ➢ Performing feasibility analysis, GAP Analysis on AS-IS and TO-BE processes. ➢ Served as Business Analyst to oversee the Data Normalization and IST testing process, evaluating the quality of the data and content before prior to data load. ➢ Represented the Financial Crimes Transaction Monitoring (FCTM) team in EMEA LATAM and APAC meetings to discuss and plan of delivering an efficient Enterprise Anti Money Laundering application.

Project Experience Summary	
	➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements. ➢ Developed, derived and clarified specifications for system related projects to ensure business unit needs are identified and communicated and to ensure technical programmers understand the functional requirements of the business unit.
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Sharadh has over 6 years of experience acting as a liaison between internal and external customers, business units, technical staff, and other project team members facilitating the appropriate information pertaining to the project at hand. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Acted as the Liaison between Line of Businesses (LOBs), Technology Partners (Source Applications) and implementation team. ➢ Coordinated with offshore team in documenting the gathered Requirements in to BRD's and FRD's. ➢ Met with users and stakeholders to understand the problem domain, gathered customer requirements through surveys, interviews (group and one-on-one) along with JAD sessions. ➢ Bridged communication between the client and the project team. ➢ Conferred periodically with both business unit and technical programmers throughout the lifecycle of assigned projects to track progress. ➢ Helped facilitate Joint Application Design (JAD) sessions allowing clients across the board to communicate with each other to resolve problems and assist in loan servicing. ➢ Coordinated with the Business Users, Subject Matter Experts (SME's) and Stakeholders to identify and analyze the Business Requirements.

Project Experience Summary	
4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs	Sharadh has over 6 years of experience collaborating in a team environment analyzing the tradeoff between usability and performance needs. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Performing ad hoc analysis of business situations, issues and problems. ➢ Creating detailed Use Cases Scenarios and Modeling Use Cases Diagrams in MS Visio. ➢ Performing feasibility analysis, GAP Analysis on AS-IS and TO-BE processes. ➢ Performed User Acceptance testing. ➢ Performed system and document analysis to understand the current systems. ➢ Performed data validation using SQL queries and ran ad-hoc queries for verification by the business users.
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Sharadh has more than a year of experience analyzing laws and regulations that may affect or change significant project scope. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** These projects involved the following tasks: ➢ Performing ad hoc analysis of business situations, issues and problems. ➢ Lead the Prepaid Team in IST Testing, Defect Remediation and Solution Delivery. Acted as the SME on all prepaid related matters including the Interface Specification. Operated as prepaid interface product owner and gatekeeper. ➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements.

Project Experience Summary	
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency's needs.	Sharadh has more than 4 years of experience assisting in the creation of test plans and training materials as well as the execution of those things as relevant to the project. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** These projects involved the following tasks: ➢ Highly skilled in creating, writing, and executing Test Cases, Test Scripts from Business User Requirement documents and Functional Design Documents. ➢ Participating in User Acceptance Testing (UAT). Served as Business Analyst to oversee the Data Normalization and IST testing process, evaluating the quality of the data and content before prior to data load. ➢ Coordinated daily meetings to discuss the outcome of implementation processes, testing efforts, time lines etc. Provided Guidance and Leadership as needed. ➢ Lead the Prepaid Team in IST Testing, Defect Remediation and Solution Delivery. Acted as the SME on all prepaid related matters including the Interface Specification. Operated as prepaid interface product owner and gatekeeper. ➢ Maintained and created Enterprise wide test cases for SME Testing, Oracle Mantas testing and Integrated Systems Testing ➢ Developed test scenarios and implemented test plan. ➢ Performed User Acceptance testing. ➢ Coordinated with QA team to determine and develop Test Plans, Test Cases and methods for Unit Testing, Integration and Functional Testing based on testing requirements. ➢ Participated in User Acceptance Testing (UAT) and developed Training Manuals.

Project Experience Summary	
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Sharadh has over 6 years of experience coordinating with various project resources and incorporating all gathered requirements ensuring that the what was intended to be incorporated actually is. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Participating in identifying the User requirements by working with number of key individuals from business and information technology. ➢ Developing Business Requirements Documents (using MS Office suite) and communicating them to the build team. ➢ Highly skilled in creating, writing, and executing Test Cases, Test Scripts from Business User Requirement documents and Functional Design Documents. ➢ Acted as the Liaison between Line of Businesses (LOBs), Technology Partners (Source Applications) and implementation team. ➢ Participated in BRD review meetings to provide knowledge and Expertise on Anti Money Laundering (AML) Initiatives and AML deliverables. ➢ Collaborated with Subject Matter Experts (SMEs) regularly to update my knowledge on ever-changing regulatory requirements. ➢ Gathered and Coordinated Business requirements and converted them into appropriate functional requirements. ➢ Gathered requirements from Business Line Mangers and SMEs for the redesigned Great West Client Portal, Client Database and to digitize the Transactions. ➢ Created business use case, functional (FRS) and technical specifications for Payment system. ➢ Developed Use Case diagrams, Use case Narratives and User Stories. ➢ Met with users and stakeholders to understand the problem domain, gathered customer requirements through surveys, interviews (group and one-on-one) along with JAD sessions. ➢ Prepared High Level Process Flow Diagrams and Business Process Flow diagrams for Great West Client Portal functionalities in Visio.

Project Experience Summary	
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Sharadh has over 6 years of experience assisting project team staff by applying lessons learned and subject matter expertise gathered from previous project experience to help identify and mitigate, project risks and issues. Provided below is a list of projects demonstrating his experience with this requirement: ➢ **Bank of America (09/2014 – Present)** ➢ **JP Morgan Chase (06/2012 – 08/2013)** ➢ **Great West Financial (12/2010 – 05/2012)** ➢ **Fannie Mae (03/2009 – 11/2010)** ➢ **Sun Financials (03/2006 – 02/2009)** These projects involved the following tasks: ➢ Preparing and tracking project plans from project inception to completion. ➢ Performing ad hoc analysis of business situations, issues and problems. ➢ Maintained and created Enterprise wide test cases for SME Testing, Oracle Mantas testing and Integrated Systems Testing. ➢ Developed, derived and clarified specifications for system related projects to ensure business unit needs are identified and communicated and to ensure technical programmers understand the functional requirements of the business unit.
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	➢ I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

2.6 Preethika Rai – Business Analyst

2.6.1 Resume

Preethika Rai

Qualifications

Preethika is a Business Analyst with over seven years of diverse experience with requirements management, business analysis, data analysis, and project management. She is proficient in developing functional specifications for business process refinement and automation, data modeling, and system architecture and is experienced with conducting feasibility studies and scope. Additionally, she has experience conducting requirements gathering sessions and joint application development sessions. Preethika possesses exceptional written and verbal communication skills and is a skilled technical writer. She has excellent analytical and problem solving skills and possesses the ability to work across multiple vendors and stakeholders.

Experience

- Seven years of diverse requirements management experience
- More than seven years of experience facilitating JAD and RG sessions
- More than eight years of experience with Use Case and Business Process Modeling

Expertise

- Unified Modeling Language
- Facilitating JAD and RG sessions
- Technical writing
- Test strategies, plans, cases, and environments

Professional Summary

2014 – Present	BJ's Wholesale Club
2013 – 2014	Sovereign Bank
2012 – 2013	Avatar Financial Group
2011 – 2012	CMI LLC
2010 – 2011	Tufts Health Plan
2010 – 2010	Pharmacia & Upjohn
2009 – 2010	Ithaka
2007 – 2009	Netsoft Microsystems

BJ's Wholesale Club – Natick, MA ***04/2014 – Present***

Senior Business System Analyst

BJ's Wholesale Club, Inc. commonly referred as BJ's, is a membership-only warehouse club chain operating on the United States East Coast, as well as in the state of Ohio. The project was to enhance the functionalities of POS (Point of Sale) system and its access to inventory management system and membership data management application to increase the effectiveness of target marketing to increase ROI (return on investment).

- Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio and analyzed them to create "As-Is" and "To-Be" scenarios.
- Interacted with department heads to finalize business requirements, functional requirements, and technical requirements and also created a business process model.
- Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving

Preethika Rai

problems on a daily basis.

- Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stakeholders and document analysis; represented them in a Requirements Traceability Matrix (RTM).
- Involved in creation and reviewing of Functional Specifications and created a Functional Requirement Document.
- Led and conducted JAD sessions for requirements gathering, analysis, and design of the system.
- Conducted JAD sessions and created Use Cases, Work Flows, Screen Shots, and Power Point presentations for the Web Applications.
- Provided implementation assessment, strategy, and mentoring services for Rational Rose, UML, and RUP.
- Created and maintained Narrative Use Cases (Business Use Cases and System Use Cases).
- Followed the adaptive RUP framework for the whole Project life cycle (PLC).
- Fine-tuned search engines and pulled data from different databases and migrated data back and forth using SQL.
- Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, OOAD, Visio, and Business Process Modeling.
- Teamed up with both internal and external software development groups to provide functional requirements specifications in the form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements.
- Assisted in Data Mart Design and Prototyping.
- Worked on the following applications: Business Objects, Enterprise Architect, Toad, Plainview (project management), and Microsoft Suite (Word, Excel, PowerPoint, Visio, Access, Project).
- Involved in the creation and execution of manual test cases in Mercury Test Director and automated Test Cases in QTP; analyzed the Test Results.

Environment: MS-Project, MS-Office Suite, MS Visio, HPQC, Windows XP, Oracle, Mainframes, .NET Java, J2EE.

Sovereign Bank – Boston, MA *02/2013 – 04/2014*

Business Analyst

Sovereign Bank offers a broad array of financial services, including retail, business and corporate banking, cash management, capital markets, private wealth management, and insurance. Sovereign Bank joined the Santander group in 2009, and there is a major transformation project happening to migrate from Sovereign's legacy banking system to the Santander proprietary banking system. The project involves redesigning the checks department and analyzing the GAPs in the to-be system and the as-is system. It also involved enhancing and upgrading the system according to the needs of the Bank users increasing its usability and portability.

- Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues, and come to an agreement quickly.
- Involved in requirements gathering using Rational Requisite Pro, which included interviews, brainstorms, and meetings with stakeholders.
- Identified the current business process, documented the work flow, and improved the efficiency of the current business process.
- Provided understanding of Posting, Check payment, ACH, Mortgage, Lockbox, Fraud, and Exceptions.
- Extensively involved in Accounts migration and Data migration from the core Sovereign system to proprietary Santander system.
- Identified and created all necessary Business Use Cases from requirements and created UML Diagrams

Preethika Rai

including Use Cases Diagrams, Activity Diagrams, Sequence Diagrams, and Class Diagrams using Microsoft Visio 2007.

- Involved in the creation and maintenance of the Workflow plans and artifacts for all the waves.
- Involved as a SME in the designing of the Posting file and the Database used to verify the posting process.
- Involved in the writing the SQL queries and managing the Oracle database for the Posting process.
- Maintained and kept track of stakeholders' requests for enhancements and changes using Rational Clear Quest.
- Provided expertise in Performance Management, Asset Management, and Credit Management.
- Understood the business logic, User requirements, and test-objectives to develop test plans, test cases, and test case execution using Test Director.
- Tested the application manually by executing Test Cases prior to Automation.
- Involved in automating test cases using QTP and Load Runner.
- Performed various testing including regression, system, integration, end to end, smoke, functional, and back end and front end testing.
- Participated in Bug-Review meetings with software developers, QA engineers, managers, and suggested enhancements to the existed application from business perspectives; provided solutions to existing bugs.
- Conducted UAT (User Acceptance Testing) to ensure all user requirements were catered by the application.
- Involved in preparing a simple and detailed User manual for the application for the intended users.
- Provided training to the Users and explained the Business as well as the Technical side of the Proprietary Santander system.

Environment: Agile, SDLC, Erwin, Microsoft Office 2007 (Word, PowerPoint, Access, Excel Macros and Pivot, Outlook, Project, Visio), Rational Requisite pro, Rational Clear Quest, QTP, Load Runner, Mercury Quality Centre, SQL, Oracle 10g Java, SQL Server Reporting Services SSRS.

Avatar Financial Group – Orlando, FL *03/2012 – 01/2013*

Business Analyst

Avatar Financial Group funds real estate loans that don't meet bank standards and for borrowers who don't have time to wait. Avatar is a unique type of hard money lending company that's institutionally funded. The project involved streamlining the paper based mortgage process and giving quick updates to the loan officers and customers. The goal was to enhance the customer experience.

- Implemented a structured system development methodology with emphasis on RUP Methodology that dramatically improved productivity and reduced errors.
- Created Business Requirement Specifications using Rational Requisite Pro.
- Conducted walkthrough sessions of Business Requirement Documents (BRD) and Technical Specifications (FSD) with the technical team.
- Analyzed data to generate information about clients and their attributes like institution, site, and buildings. This data was structured and pushed into tables.
- Responsible for meetings with users and stakeholders to identify problems, resolve issues, and improve the process to ensure a stable and accurate solution.
- Created an exceptions report which was submitted to the Project Lead and stakeholders on a regular basis.
- Worked with end users to identify business requirements.
- Actively involved in Data Modeling, ensuring all data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream and maintained documentation of the process.
- Conducted workflow and Process diagram and GAP analysis to derive requirements for existing systems

Preethika Rai

enhancements.

- Performed testing using Mercury products (Win runner and test director).
- Worked extensively with the QA team for designing Test Plan and Test Cases for the User Acceptance testing.
- Involved in analysis of Requirement Specifications and planning by formulating Test Strategies and Test Cases in Test Director 8.0 for the Functional, Integration, Security, and smoke testing.

Environment: Quality Centre, Rational Rose, HTML, UML, XML, RUP, MS Office, MS Visio, MS Project, Dot Net, Java, Oracle, DWH, SQL, RDBMS, Win Runner, Test Director.

CMI LLC – San Jose, CA ***04/2011 – 02/2012***

Business Analyst

The assignment was a major up gradation project. It involved retirement of a host of legacy applications with a third-party Policy Administration system and was planned for implementation in two phases, Release 1 & 2. Release 2 was divided into three categories: Product Requirements, Non-Product Requirements, and Integration. Non-product needs are those that support business architecture changes. As a Business Analyst, was involved with four modules within the Non-product requirements namely Workflow Enhancements, Name Clearance, and Automated Policy Numbering.

- Documented the artifacts in required formats, namely: Business Requirement Document, Functional Requirement Document, and Business Scenario Document.
- Responsible for gathering requirements through interviews and status meetings with Business Users and SMEs from the Operations, Underwriting [Property & Casualty], BPO, and the MGA fronts.
- Conducted JAD sessions to discuss requirements and resolve conflicts between stakeholders.
- Captured requirements in informal and formal sessions while maintaining scope and change control to provide the best quality in all of the assigned jobs. Received mutual satisfaction of the business partners/sponsors.
- Responsible for Product Management, Business Process flow, Business Process Modeling, and Business Analysis with Document and Records Management.
- Analyzed and translated user-level requirements into a logical design, using UML diagrams, Use Cases, and Activity diagrams.
- Performed data mapping and logical data modeling and created class diagrams and ER diagrams.
- Created screen mock ups based on the requirements put forth by the SMEs.
- Participated in working sessions with the Project Manager and SMEs, which involved white boarding the scenario flows for gaining better clarity on the requirements.
- Bridged the difference between the end user's non-technical point of view and the developer's technical point of view to clarify uncertain requirements.
- Held elicitation workshops and attended demo sessions along with Business Analysts to do the feasibility study and understand the existing capabilities of the Policy Administration system before customization.
- Performed Gap Analysis to check the compatibility of the existing system infrastructure with the new business requirements.
- Involved in creating the targeted questionnaire for SMEs and Business Users for elaborating and getting clarity on requirements.
- Participated in interactions with the SME, Project Manager, Developers, and the End-Users.

Environment: RUP Methodology, Microsoft Word, Microsoft Excel, Microsoft Access and Microsoft PowerPoint, and Windows 7, SQL server.

Preethika Rai

Tufts Health Plan – Springfield, MA — *08/2010 – 03/2011*

Business Analyst

Tufts Health Plan offers a range of health care coverage options to individuals and through employer groups. The project involved building an Enterprise SOA (service-oriented architecture) based system that was to be developed on the Microsoft .NET Platform. The new Claims Processing MMIS (Medicaid Management Information System) replaced the old legacy system thereby automating all the business areas with minimum human intervention.

- Involved with drafting the migration plan for the Claims Processing data which needed to be migrated from the Mainframe to the SQL Server environment.
- Conducted requirement gathering sessions with the Information Technology team.
- Attended JAD sessions for Requirement Validation to gather requirements for the new MMIS.
- Developed Use Cases, Activity diagrams, and Sequence diagrams from the requirements based on the UML methodologies using MS-Visio.
- Involved in the design and development of User Interfaces (UI) using HTML, JavaScript and JSP.
- Held periodical meetings with the development team to gather information on the progress and resolve project issues.
- Used Microsoft SharePoint as the version tracking tool for managing the requirements documentation.
- Helped the testing team in carrying out manual testing and assisted in writing test cases and a Test Plan.
- Tested the final application for usability testing to verify whether all the User Requirements were catered by the application.
  - ✓ Bugs that would enhance the usability of the application were logged using Rational ClearQuest.
- Interacted with the developers on resolving the reported bugs and various technical issues.
- Tested the features and functions based on priority using Rational Quality Manager.
- Involved in preparing a simple and detailed User manual for the application for an intended novice user.

Environment: Rational RequisitePro, Rational Rose, UML, MS-Project, MS Visio, Java, MS Office, Windows XP, Microsoft SharePoint, RQ

Pharmacia & Upjohn – Kalamazoo, MI — *02/2010 – 07/2010*

Business Analyst

Pharmacia and Upjohn is one of the largest pharmacy companies in the United States. The company has a number of divisions, each of which produce different products pertaining to medical supplies for use within the United States and different parts of the world. In order to keep track of the huge amounts of data generated in clinical trials and with respect to sales and expenses, a data warehouse was developed. Based on the warehouse, the management was able to take sound decisions regarding budgets to forecast the company business decisions. Also, a separate accounting system was created with general ledger accounting, budget tools, and Chart-Security Maintenance Application (CSMA).

- Interfaced with the client as part of the requirements engineering team to finalize the project scope.
- Assisted the Project Manager in developing Use Cases and project plans and managed changes to the scope of the project.
- Owned the entire reporting process. Interacted with the ETL team, developer(s), management, and account holders to get the requirements, document them, design templates, and write specifications.
- Involved in analysis for a wide range of Six Sigma and Web-based initiatives, including user requirements.
- Conducted interviews with end-users to collect requirements and business process information.

Preethika Rai

- Implemented data access and storage and validation routines on the database server using Procedural Language/Structured Query Language (PL/SQL).
- Developed business process models in RUP to document existing and future business processes.
- Created Process Flow diagrams, Use Case Diagrams, Class Diagrams, and Interaction Diagrams using Microsoft Visio and Rational Rose.
- Performed extensive Requirement Analysis, including data analysis and gap analysis.
- Designed and developed project document templates based on SDLC methodology.
- Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, and OOD using UML.
- Assumed ownership of Use Case Diagrams, Use Case narratives, and other various artifacts.
- Participated in the logical and physical design sessions and assisted and developed high and low level design documents.
- Assisted the Project Manager in setting realistic project expectations and in evaluating the impact of changes on the project plans accordingly.
- Conducted project related presentations.
- Assisted with user testing of systems, developing and maintaining quality procedures, and ensuring that appropriate documentation was in place.
- Conducted User Acceptance Testing (UAT).
- Functioned as the primary liaison between the business line, operations, and the technical areas throughout the project life cycle.
- Performed task decomposition, delegated tasks, and monitored project milestones using MS Project.

Environment: Microsoft Office Suite, Microsoft Visio, Documentum, UML, J2EE, Windows NT/XP, Oracle, SQL, SQL Server, Six Sigma, PL/SQL, UNIX, VBScript, C#. NET, ASP.NET, Business Objects, TestDirector, LoadRunner

Ithaka – Ann Arbor, MI ***07/2009 – 01/2010***

Senior Business Analyst

ITHAKA is a not-for-profit organization that helps the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways. The organization has invested in developing a highly functional and cutting edge platform for its core products and to consolidate all its services onto a single platform and architecture.

- Documented business, functional, and technical requirements for the new delivery platform.
- Provided requirement elicitation through discussions and interviews with business and technical staff, both on and off site (New York).
- Incorporated these requirements into a variety of artifacts, including prioritized feature lists (product backlog), functional specifications, business requirement documents, use cases, organizational and business process diagrams, and information architecture diagrams.
- Organized and conducted financial vendor evaluation.

Netsoft Microsystems - India ***05/2007 – 06/2009***

Jr. Business Analyst

Netsoft Microsystems is an IT Solutions and Service Provider which offers guidance, know-how, and a comprehensive portfolio of services to help customers realize measurable business value from their IT investments.

Preethika Rai

Automated Bill Pay System Project: The aim of the project was to implement a system which could be used by the customers to pay their bills online. This product could be integrated with existing banking systems. Some of the main features of the system were managing payee information, scheduling payments, determining estimated delivery dates, etc. The system also generated a variety of reports regarding the history of payments, payee information, etc.

- Interacted closely with SMEs for the functional requirements gathering.
- Facilitated JAD sessions.
- Conducted interviews and question and answer sessions with business users to solicit business requirements relative to proposed functionality.
- Created Functional and Non-functional requirements.
- Worked closely with the development team to clarify and understand functionality and resolve issues and provided feedback from the UML diagrams.
- Created Use Cases and Business Use Cases model after accessing the scope and status of the project and understanding the business processes form USER perspective.
- Analyzed, collected, and prepared user requirements, definitions, scope, and expectations for deliverable plans and delivered system documents, processes, and diagrams.
- Defined business processes, identified GAPs, evaluated requirements and change requests, managed scope, and transferred knowledge.
- Developed and managed all the work plans, acted as the key client contact, handled all kinds of scheduling, ran all status meetings, and compiled various reports.

Environment: UML, Use Case Analysis, MS Visio, Enterprise Architect, MS Office

Education and Certifications

University of Madras, Bachelor's degree in Business Administration

Relevant Skills

- **Operating Systems:** Windows, UNIX, LINUX, Mac
- **Languages:** SQL, C, C++, Java, XML, C#, VB, ASP, .Net, Assembly, VHDL
- **Databases:** Oracle, MS SQL server, MS Access, IBM DB2
- **Tools:** MS Office, MS Project, MS Visio, Front Office, Rational Rose, SoDA, Software Modeler, Team Test, Doors, PROLOG, Clearcase, Clear Quest, WebSphere, Business Modeler, HP Quality Centre, Ultra Edit, TOAD
- **Industry Standards:** HIPPA, SOX, ISO, Six Sigma, CMM, HL7

2.6.2 References

Reference #1	
Start Date: 04/2014	**End Date**: Present
Client Name: BJ's Whole Sale Club **Contact Name**: Vamsi Gummalla **Title**: Lead **Phone**: (616) 777 - 6996 **Email**: fiberguru@gmail.com	
Description of Work Performed: Served as a Senior Business System Analyst on a project intended to enhance the functionalities of a Point of Sale system and its access to an inventory management system and a membership data management application to increase the effectiveness of target marketing and return on investment. Responsibilities included, but were not limited to: development of diagrams, Work Flows, and Process Flows; interaction with department heads to finalize business requirements, functional requirements, and technical requirements; facilitation of JRP sessions between technical and regulatory teams; and involvement in the creation and review of Functional Specifications and creation a Functional Requirement Document.	

Reference #2	
Start Date: : 04/2014	**End Date**: Present
Client Name: BJ's Whole Sale Club **Contact Name**: Anil Perumandla **Title**: Team Member **Phone**: (331) 422 - 9463 **Email**: anil.perumandla@centurylink.com	
Description of Work Performed: Served as a Senior Business System Analyst on a project intended to enhance the functionalities of a Point of Sale system and its access to an inventory management system and a membership data management application to increase the effectiveness of target marketing and return on investment. Responsibilities included, but were not limited to: development of diagrams, Work Flows, and Process Flows; interaction with department heads to finalize business requirements, functional requirements, and technical requirements; facilitation of JRP sessions between technical and regulatory teams; and involvement in the creation and review of Functional Specifications and creation a Functional Requirement Document.	

2.6.3 Experience Packet

Project Experience Summary	
Mandatory Requirement	**Experience**
4.1.1.1 Analyze and define business objectives and strategies utilizing business process reengineering workflow development and analysis, and other related methodologies.	Preethika has over seven years of experience analyzing and defining business objectives and strategies utilizing business process reengineering and workflow development and analysis. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create "As-Is" and "To-Be" scenarios. ➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM). ➢ Conducted JAD sessions, created Use Cases, Work Flows, Screen Shots and Power Point presentations for the Web Applications. ➢ Followed the adaptive RUP framework for the whole project life cycle. ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Involved in the creation and maintenance of the Workflow plans and artifacts for all the waves. ➢ Implemented a structured system development methodology with emphasis on RUP Methodology that dramatically improved productivity and reduced errors. ➢ Conducted workflow, process diagram and GAP analysis to derive requirements for existing systems enhancements.

Project Experience Summary	
	➢ Captured requirements in informal and formal sessions while maintaining scope and change control to provide the best quality in all of the assigned jobs and get mutual satisfaction of the business partners/sponsors. ➢ Responsible for Product Management, Business Process flow, Business Process Modeling and Business Analysis with Document and Records Management. ➢ Analyzed and translated user-level requirements into a logical design, using UML diagrams, Use Cases and Activity diagrams. ➢ Performed Gap Analysis to check the compatibility of the existing system infrastructure with the new business requirements. ➢ Involved in analysis for wide range of Six Sigma and Web-based initiatives, including user requirements. ➢ Developed business process models in RUP to document existing and future business processes. ➢ Created Process Flow diagrams, Use Case Diagrams, Class Diagrams and Interaction Diagrams using Microsoft Visio and Rational Rose. ➢ Designed and developed project document templates based on SDLC methodology. ➢ Performed extensive Requirement Analysis including data analysis and gap analysis. ➢ Incorporated these requirements into a variety of artifacts including prioritized feature lists (Product backlog), functional specifications, business requirement documents, use cases, organizational and business process diagrams, and information architecture diagrams. ➢ Defined business processes, identified GAPs, evaluated requirements and change requests, managed scope and transferred knowledge.
4.1.1.2 Review existing documentation, procedures, processes, so that the Business Analyst can be conversant in the assigned subject matter. This may also entail working alongside Agency subject matter experts to learn the details of certain workflows.	Preethika has over seven years of experience reviewing documentation, procedures, and processes leveraging the knowledge from that analysis to drive project work. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks:

Project Experience Summary	
	➢ Interacted with department heads to finalize business requirements, functional requirements and technical requirements and also created Business process model. ➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM). ➢ Involved in creation and reviewing of Functional Specifications and created a Functional Requirement Document. ➢ Led and conducted JAD sessions for requirements gathering, analysis and design of the system. ➢ Conducted JAD sessions, created Use Cases, Work Flows, Screen Shots and Power Point presentations for the Web Applications. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Responsible for meetings with users and stakeholders to identify problems, resolve issues and to improve the process to ensure a stable and accurate solution. ➢ Held elicitation workshops and attended demo sessions along with Business Analysts to do the Feasibility study and understand the existing capabilities of the Policy Administration system before customization. ➢ Participated in working sessions with the PM and SMEs which involved white boarding the scenario flows for gaining better clarity on the requirements.
4.1.1.3 Identify and document new business requirements derived from any change to project scope and/or legislative changes (state and federal).	Preethika has over seven years of experience identifying and documenting new business requirements related to any project specific changes or changes in state or federal legislation. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Actively involved in Data Modeling thereby making sure all the data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream, and maintained documentation of the process.

Project Experience Summary	
	➢ Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving problems on a daily basis. ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Extensively involved in Accounts migration and Data migration from the core Sovereign system to proprietary Santander system. ➢ Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs. ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create "As-Is" and "To-Be" scenarios.
4.1.1.4 Evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into process details, generalize low-level information to form an overall subject matter understanding, and interpret business user requests to distinguish between actual business needs and user wishes.	Preethika has over seven years of experience evaluating information from multiple sources and communicating and resolving any conflicts or inconsistencies in the information. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Interacted with department heads to finalize business requirements, functional requirements and technical requirements and also created Business process model. ➢ Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving problems on a daily basis. ➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM).

Project Experience Summary	
	➢ Involved in creation and reviewing of Functional Specifications and created a Functional Requirement Document. ➢ Led and conducted JAD sessions for requirements gathering, analysis and design of the system. ➢ Conducted JAD sessions, created Use Cases, Work Flows, Screen Shots and Power Point presentations for the Web Applications. ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly. ➢ Involved in requirement gathering using Rational Requisite Pro, which included interviews, brainstorms and meetings with stakeholders. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Maintained and kept track of stakeholders' requests for enhancements and changes using Rational Clear Quest. ➢ Conducted a walkthrough session of Business Requirement Documents (BRD) and Technical Specifications (FSD) with the technical team. ➢ Responsible for meetings with users and stakeholders to identify problems, resolve issues and to improve the process to ensure a stable and accurate solution. ➢ Responsible for gathering requirements through interviews and status meetings with Business users and SMEs from the Operations, Underwriting [Property & Casualty], BPO and the MGA fronts. ➢ Conducted JAD sessions to discuss requirements and resolve conflicts between stakeholders ➢ Captured requirements in informal and formal sessions while maintaining scope and change control to provide the best quality in all of the assigned jobs and get mutual satisfaction of the business partners/sponsors. ➢ Analyzed and translated user-level requirements into a logical design, using UML diagrams, Use Cases and Activity diagrams. ➢ Conducted requirement gathering sessions with the Information Technology team. ➢ Attended JAD sessions for Requirement Validation to gather requirements for the new MMIS. ➢ Developed Use Cases, Activity diagrams and Sequence diagrams from the requirements based on the UML methodologies using MS-Visio.
4.1.1.5 Proactively communicate and collaborate with external and internal customers to analyze information needs and functional	Preethika has over seven years of experience communicating and collaborating with internal and external teams, stakeholders, and customers in order to gather and deliver necessary project information and documentation.

Project Experience Summary	
requirements and deliver documentation including, but not limited to, functional requirements, use cases, design specifications, etc.	Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Understood the business logic, User requirements, and test-objectives to develop test plans, test cases, and test case execution using Test Director. ➢ Created Business Requirement Specifications using Rational Requisite Pro. ➢ Conducted walkthrough session of Business Requirement Documents (BRD) and Technical Specifications (FSD) with technical team. ➢ Documented the artifacts in required formats namely Business Requirement Document, Functional Requirement Document and Business Scenario Document. ➢ Responsible for gathering requirements through interviews and status meetings with Business users and SMEs from the Operations, Underwriting [Property & Casualty], BPO and the MGA fronts. ➢ Held elicitation workshops and attended demo sessions along with Business Analysts to do the Feasibility study and understand the existing capabilities of the Policy Administration system before customization. ➢ Participated in interactions with the Subject Matter Expert, Project Manager, Developers, and the End-Users. ➢ Conducted requirement gathering sessions with the Information Technology team. ➢ Developed Use Cases, Activity diagrams and Sequence diagrams from the requirements based on the UML methodologies using MS-Visio. ➢ Interacted with the developers on resolving the reported bugs and various technical issues. ➢ Functioned as the primary liaison between the business line, operations, and the technical areas throughout the project life cycle. ➢ Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, and OOD using UML.

Project Experience Summary	
4.1.1.6 Work in multiple functional business areas simultaneously (“multi-task”)	Preethika has over seven years of experience simultaneously working in multiple functional business areas. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ’s Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM). ➢ Identified and created all necessary Business Use Cases from requirements, created UML Diagrams including Use Cases Diagrams, Activity Diagrams, Sequence Diagrams, and Class Diagrams using Microsoft Visio 2007. ➢ Analyzed data to generate information about clients and their attributes like institution, site, and buildings. This data was structured and were pushed into tables. ➢ Actively involved in Data Modeling thereby making sure all the data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream, and maintained documentation of the process. ➢ Responsible for Product Management, Business Process flow, Business Process Modeling and Business Analysis with Document and Records Management. ➢ Owned the entire reporting process. Interacted with the ETL team, developer(s), management, and account holders to get the requirements, document them, design templates, and write specifications. ➢ Created Process Flow diagrams, Use Case Diagrams, Class Diagrams and Interaction Diagrams using Microsoft Visio and Rational Rose. ➢ Analyzed, collected, and prepared user requirements, definitions, scope and expectations for deliverable plans and delivered system documents, processes, diagrams. ➢ Created Use Cases and Business Use Cases model after accessing the scope and status of the project and understanding the business processes form USER perspective.

Project Experience Summary	
4.1.1.7 Drive and challenge business units on their assumptions by determining the reasons for requested process changes and evaluate whether the proposed changes can be implemented and at what cost relative to the perceived benefit.	Preethika has over seven years of experience determining reasoning for process change requests and evaluating if requests should be implemented and the financial impact of the request. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create "As-Is" and "To-Be" scenarios. ➢ Interacted with department heads to finalize business requirements, functional requirements and technical requirements and also created Business process model. ➢ Involved in creation and reviewing of Functional Specifications and created a Functional Requirement Document. ➢ Provided implementation assessment, strategy, and mentoring services for Rational Rose, UML and RUP. ➢ Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, OOAD, Visio and Business Process Modeling. ➢ Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly. ➢ Involved in requirement gathering using Rational Requisite Pro, which included interviews, brainstorms and meetings with stakeholders. ➢ Maintained and kept track of stakeholders' requests for enhancements and changes using Rational Clear Quest. ➢ Responsible for meetings with users and stakeholders to identify problems, resolve issues and to improve the process to ensure a stable and accurate solution. ➢ Actively involved in Data Modeling thereby making sure all the data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream, and maintained documentation of the process. ➢ Analyzed and translated user-level requirements into a logical design, using UML diagrams, Use Cases and Activity diagrams.

Project Experience Summary	
	➢ Captured requirements in informal and formal sessions while maintaining scope and change control to provide the best quality in all of the assigned jobs and get mutual satisfaction of the business partners/sponsors.
4.1.1.8 Serve as the liaison between the customer community (internal and external customers), business units, technical staff, and the Project Team.	Preethika has over seven years of experience serving as a liaison between internal and external customers, business units, and other project team members facilitating the appropriate information pertaining to the project at hand. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Interacted with department heads to finalize business requirements, functional requirements and technical requirements and also created Business process model. ➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM). ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs. ➢ Worked with end users to identify business requirements. ➢ Worked extensively with the QA team for designing Test Plan and Test Cases for the User Acceptance testing (UAT). ➢ Assisted the PM in setting realistic project expectations and in evaluating the impact of changes on the project plans accordingly and conducted project related presentations. ➢ Worked closely with the development team to clarify and understand functionality, resolve issues and provided feedback from the UML diagrams.

Project Experience Summary	
4.1.1.9 Collaborate with the Project Team to analyze tradeoffs between usability and performance needs	Preethika has over seven years of experience working with project teams to analyze tradeoffs between usability and performance needs. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create "As-Is" and "To-Be" scenarios. ➢ Involved in creation and reviewing of Functional Specifications and created a Functional Requirement Document. ➢ Designed and developed, Use Cases, Activity Diagrams, Sequence Diagrams, OOAD, Visio and Business Process Modeling. ➢ Expertise in Performance Management, Asset Management, Credit Management and implementing its benefits. ➢ Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs. ➢ Captured requirements in informal and formal sessions while maintaining scope and change control to provide the best quality in all of the assigned jobs and get mutual satisfaction of the business partners/sponsors. ➢ Participated in working sessions with the PM and SMEs which involved white boarding the scenario flows for gaining better clarity on the requirements. ➢ Held periodic meetings with the Development team to gather information on the progress and resolve project issues.
4.1.1.10 Analyze laws and regulations that govern business or technical areas and ascertain the significance to business or technical units. This would include understanding how proposed regulatory changes may positively or negatively impact these units.	Preethika has over seven years of experience analyzing laws and regulations that may affect or change significant project scope. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)**

Project Experience Summary	
	➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Actively involved in Data Modeling thereby making sure all the data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream, and maintained documentation of the process. ➢ Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving problems on a daily basis. ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Extensively involved in Accounts migration and Data migration from the core Sovereign system to proprietary Santander system. ➢ Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs. ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create “As-Is” and “To-Be” scenarios.
4.1.1.11 Assist in the creation of test plans and training materials, and execution of testing and training relevant to the Agency’s needs.	Preethika has over seven years of experience assisting in the creation of test plans and training materials as well as the execution of those things as relevant to the project. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ’s Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)**

Project Experience Summary	
	These projects involved the following tasks: ➢ Helped the testing team in carrying out manual testing and also assisted in writing test cases and a Test Plan. ➢ Understood the business logic, User requirements, and test-objectives to develop test plans, test cases, and test case execution using Test Director. ➢ Involved in preparing a simple and detailed User manual for the application, for the intended users. ➢ Provided training to the Users and explaining them the Business as well as the Technical side of the Proprietary Santander system. ➢ Worked extensively with the QA team for designing Test Plan and Test Cases for the User Acceptance testing (UAT). ➢ Involved in preparing a simple and detailed User manual for the application, for an intended novice user. ➢ Involved in creation and execution of manual test cases in Mercury Test Director and automated Test Cases in QTP and analyzed the Test Results.
4.1.1.12 Coordinate with various project resources to ensure all requirements are incorporated into the project and implemented as intended.	Preethika has over seven years of experience coordinating with project resources, ensuring all requirements are incorporated into the project and implemented as intended. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Interacted with department heads to finalize business requirements, functional requirements and technical requirements and also created Business process model. ➢ Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving problems on a daily basis. ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Led and conducted JAD sessions for requirements gathering, analysis and design of the system.

Project Experience Summary	
	➢ Performed Requirement Analysis by gathering both functional and non-functional requirements based on interactions with the process owners & stake holders and document analysis, represented them in Requirements Traceability Matrix (RTM).
4.1.1.13 Assist Agency technical staff by using acquired subject matter knowledge to identify potential issues that may affect data migration.	Preethika has over seven years of experience assisting staff by using subject matter knowledge to identify potential issues that could potentially affect data migration. Provided below is a list of projects demonstrating her experience with this requirement: ➢ **BJ's Wholesale Club (04/2014 – Present)** ➢ **Sovereign Bank (02/2013 – 04/2014)** ➢ **Avatar Financial Group (03/2012 – 01/2013)** ➢ **CMI LLC (04/2011 – 02/2012)** ➢ **Tufts Health Plan (08/2010 – 03/2011)** ➢ **Pharmacia & Upjohn (02/2010 – 07/2010)** ➢ **Ithaka (07/2009 – 01/2010)** ➢ **Netsoft Microsystems (05/2007 – 06/2009)** These projects involved the following tasks: ➢ Actively involved in Data Modeling thereby making sure all the data elements were covered that would be required in future reporting. Ensured accuracy of data sent down-stream, and maintained documentation of the process. ➢ Facilitated JRP sessions between technical and regulatory teams for meeting requirements as well as solving problems on a daily basis. ➢ Teamed up with both internal and external software development groups to provide functional requirements specifications in form of Use Cases, Business Process Flows, and Prototypes and management reporting requirements. ➢ Identified the current business process, documented the work flow and improved the efficiency of the current business process. ➢ Extensively involved in Accounts migration and Data migration from the core Sovereign system to proprietary Santander system. ➢ Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs. ➢ Developed Data Flow Diagrams, Work Flows, Process Flows, and Entity Relationship Diagrams in MS Visio, and analyzed them to create "As-Is" and "To-Be" scenarios.
4.1.1.14 Complete monthly time sheets following Agency protocol and as directed by the Project Manager	➢ I affirm and understand the need to follow Agency protocol and complete monthly time sheets as directed by the Project Manager

APPENDIX A – ADDENDUM ACKNOWLEDGEMENT AND REQUIRED FORMS

CSG acknowledges receipt of all addenda for Solicitation Number WWV1500000017 to provide Business Analyst Professional Services. The signed addenda and required forms listed below are provided on the following pages.

1. Purchasing Affidavit
2. Vendor Preference Certificate
3. Certification and Signature Page
4. Request for Quotation Cover Page
5. Addendum Acknowledgement Form Solicitation No. WWV1500000017
   - ✓ Addendum Number 1 Cover Page
   - ✓ Addendum Number 2 Cover Page

RFQ No. WWV1500000017

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

MANDATE: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code* §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: CSG Government Solutions, Inc.

Authorized Signature: [signature] Date: 4/28/2015

State of Illinois

County of Cook, to-wit:

Taken, subscribed, and sworn to before me this 28 day of April, 2015.

My Commission expires 7/12/2015, 2015.

AFFIX SEAL HERE

NOTARY PUBLIC Christina M Diaz

OFFICIAL SEAL NOTARY PUBLIC STATE OF ILLINOIS
CHRISTINA M DIAZ
MY COMMISSION EXPIRES
JULY 12, 2015

Purchasing Affidavit (Revised 07/01/2012)

Rev. 04/14

State of West Virginia
VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with ***West Virginia Code***, §5A-3-37. (Does not apply to construction contracts). ***West Virginia Code***, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the ***West Virginia Code***. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

1. **Application is made for 2.5% vendor preference for the reason checked:**

____ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

____ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

____ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or,**

2. **Application is made for 2.5% vendor preference for the reason checked:**

____ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

3. **Application is made for 2.5% vendor preference for the reason checked:**

____ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

4. **Application is made for 5% vendor preference for the reason checked:**

____ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or,**

5. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**

____ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or,**

6. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**

____ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with *West Virginia Code* §5A-3-59 and *West Virginia Code of State Rules*.**

____ Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: CSG Government Solutions, Inc. Signed: ____________

Date: 4/28/15 Title: Exectuive Vice President

CERTIFICATIONAND SIGNATURE PAGE

By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

CSG Government Solutions, Inc.

(Company)

Tim Lenning, Executive Vice President

(Authorized Signature) (Representative Name, Title)

(312) 423 - 2111 (312) 938 - 2191 4/28/2015

(Phone Number) (Fax Number) (Date)

Purchasing Divison
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Request for Quotation
—

Proc Folder: 78201

Doc Description: Business Analyst Professional Services

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2015-04-09	2015-04-28 13:30:00	CRFQ 0323 WWV1500000017	1

BID RECEIVING LOCATION

EXECUTIVE SECRETARY
SECRETARYS OFFICE
BLDG 1 RM E119
1900 KANAWHA BLVD E
CHARLESTON WV 25305
US

VENDOR

Vendor Name, Address and Telephone Number: CSG Government Solutions, Inc.
180 N. Stetson Ave, Suite 3200
(312) 444 - 2760

FOR INFORMATION CONTACT THE BUYER

Melissa Pettrey
(304) 558-0094
melissa.k.pettrey@wv.gov

Signature X **FEIN #** 36-4150867 **DATE** 4/28/2015

All offers subject to all terms and conditions contained in this solicitation

INVOICE TO	SHIP TO
WORKFORCE WEST VIRGINIA FISCAL & ADMINISTRATIVE MANAGEMENT- 5301 112 CALIFORNIA AVE CHARLESTON WV25305-0112 US	WORKFORCE WEST VIRGINIA OFFICE OF ADMIN. SUPPORT - 5302 112 CALIFORNIA AVENUE CHARLESTON WV 25305-0112 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Business Analysts to review existing business process	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80000000			

Extended Description :

Individuals will be responsilbe for reviewing existing process documentation, suggest process improvments, update documentation as needed, review federal and state law changes for inclusion in business process re-engineering, and ultimately assist in a multi-agency initiative that may significantly impact multiple units within the Agency.

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: WWV1500000017

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:
(Check the box next to each addendum received)

[X]	Addendum No. 1	[ ]	Addendum No. 6
[X]	Addendum No. 2	[ ]	Addendum No. 7
[ ]	Addendum No. 3	[ ]	Addendum No. 8
[ ]	Addendum No. 4	[ ]	Addendum No. 9
[ ]	Addendum No. 5	[ ]	Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

CSG Government Solutions, Inc.
Company

Authorized Signature

4/28/15
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

Purchasing Divison
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Request for Quotation
—

Proc Folder: 78201

Doc Description: Addendum No. 1:To correct the Bid Receiving Location.

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2015-04-09	2015-04-28 13:30:00	CRFQ 0323 WWV1500000017	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Name, Address and Telephone Number: CSG Government Solutions, Inc.
180 N. Stetson Ave, Suite 3200
(312) 444 - 2760

FOR INFORMATION CONTACT THE BUYER

Melissa Pettrey
(304) 558-0094
melissa.k.pettrey@wv.gov

Signature X **FEIN #** 36-4150867 **DATE** 4/28/15

All offers subject to all terms and conditions contained in this solicitation

INVOICE TO	SHIP TO
WORKFORCE WEST VIRGINIA FISCAL & ADMINISTRATIVE MANAGEMENT- 5301 112 CALIFORNIA AVE CHARLESTON WV25305-0112 US	WORKFORCE WEST VIRGINIA OFFICE OF ADMIN. SUPPORT - 5302 112 CALIFORNIA AVENUE CHARLESTON WV 25305-0112 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Business Analysts to review existing business process	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80000000			

Extended Description :

Individuals will be responsilbe for reviewing existing process documentation, suggest process improvments, update documentation as needed, review federal and state law changes for inclusion in business process re-engineering, and ultimately assist in a multi-agency initiative that may significantly impact multiple units within the Agency.

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

SOLICITATION NUMBER: WWV1500000017
Addendum Number: 1

The purpose of this addendum is to modify the solicitation identified as BMS14028 ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

[ ] Modify bid opening date and time

[ ] Modify specifications of product or service being sought

[ ] Attachment of vendor questions and responses

[ ] Attachment of pre-bid sign-in sheet

[X] Correction of error

[ ] Other

Description of Modification to Solicitation:

1. **To correct the Bid Receiving Location published on the original CRFQ.**
2. **The bid opening date remains the same.**

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Purchasing Divison 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	**State of West Virginia** **Request for Quotation** —

Proc Folder: 78201

Doc Description: Addendum No. 2: To publish responses to vendor questions.

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2015-04-22	2015-04-28 13:30:00	CRFQ 0323 WWV1500000017	3

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Name, Address and Telephone Number: CSG Government Solutions, Inc.
180 N. Stetson Ave, Suite 3200
(312) 444 - 2760

FOR INFORMATION CONTACT THE BUYER

Melissa Pettrey
(304) 558-0094
melissa.k.pettrey@wv.gov

Signature X **FEIN #** 36-4150867 **DATE** 4/28/2015

All offers subject to all terms and conditions contained in this solicitation

INVOICE TO	SHIP TO
WORKFORCE WEST VIRGINIA FISCAL & ADMINISTRATIVE MANAGEMENT- 5301 112 CALIFORNIA AVE CHARLESTON WV25305-0112 US	WORKFORCE WEST VIRGINIA OFFICE OF ADMIN. SUPPORT - 5302 112 CALIFORNIA AVENUE CHARLESTON WV 25305-0112 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Business Analysts to review existing business process	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80000000			

Extended Description :

Individuals will be responsilbe for reviewing existing process documentation, suggest process improvments, update documentation as needed, review federal and state law changes for inclusion in business process re-engineering, and ultimately assist in a multi-agency initiative that may significantly impact multiple units within the Agency.

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

SOLICITATION NUMBER:WWV1500000017
Addendum Number: 2

The purpose of this addendum is to modify the solicitation identified as WWV1500000017("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

[ ] Modify bid opening date and time

[ ] Modify specifications of product or service being sought

[X] Attachment of vendor questions and responses

[ ] Attachment of pre-bid sign-in sheet

[ ] Correction of error

[ ] Other

Description of Modification to Solicitation: See attached

1. To publish agency responses to vendor questions.

2. The bid opening remains 04/28/2015 @ 1:30 P.M.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.

2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Workforce West Virginia
Purchasing Division

Business Analyst Professional Services

WWV1500000017

Cost Proposal
April 28, 2015

CSG Government Solutions

180 N. Stetson
Suite 3200
Chicago, IL 60601

Phone: (312) 444-2760
Fax: (312) 938-2191
www.csgdelivers.com

EXHIBIT A Pricing Page for WorkForce West Virginia
Business Analysts

Year	# of Analysts	Regular Hourly Rate	Hours Per Year	Total Cost
Year 1	6	$120.00	2,000	$1,440,000.00
Year 2	6	$120.00	2,000	$1,440,000.00
Year 3	6	$120.00	2,000	$1,440,000.00
Year 4	6	$120.00	2,000	$1,440,000.00
Year	**# of Analysts**	**Overtime Hourly Rate**	**Hours Per Year**	**Total Cost**
Year 1	6	$120.00	50	$36,000.00
Year 2	6	$120.00	50	$36,000.00
Year 3	6	$120.00	50	$36,000.00
Year 4	6	$120.00	50	$36,000.00
			GRAND TOTAL	$5,904,000.00