

Susan OConnor

From: Art Wilmes
Sent: Monday, January 16, 2017 5:03 PM
To: Burkholder, Mary; Mark McCurry; David Pierce
Cc: Thomas, Kristin C
Subject: RE: Milliman follow up
Attachments: 41WLS_BAA_1.22.2016.pdf

Mary, this should work.

Art Wilmes, FSA, MAAA | Principal and Consulting Actuary | art.wilmes@milliman.com Milliman | Chase Tower/Circle | 111 Monument Circle, Suite 601 | Indianapolis, IN 46204-5128 | USA Tel +1 317 524 3521 | Fax +1 317 639 1001 | milliman.com

This email and its contents were prepared solely for the internal business use of the Recipient. This email and its contents may not be provided to any third parties without Milliman's prior written consent. Milliman does not intend to benefit any third party recipient of this email and any related work product, even if Milliman consents to the release of its work product to such third party. If you are not the intended recipient, any disclosure, copying, distribution or any action taken or omitted to be taken in reliance on it, is prohibited and may be unlawful. Unless indicated to the contrary: it does not constitute professional advice or opinions upon which reliance may be made by the addressee or any other party, and it should be considered to be a work in progress. Unless otherwise noted in this email or its attachments, this communication does not form a Statement of Actuarial Opinion under American Academy of Actuaries guidelines.

-----Original Message-----

From: Burkholder, Mary [mailto:mburkholder2@wellspan.org]
Sent: Monday, January 16, 2017 3:15 PM
To: Mark McCurry <mark@catalystapartners.com>; David Pierce <david.pierce@milliman.com>; Art Wilmes <art.wilmes@milliman.com>
Cc: Thomas, Kristin C <kthomas6@wellspan.org>
Subject: RE: Milliman follow up

Mark,

Thank you for the prompt reply and yes, we will need to proceed with the BAA, but it will take some time on our end. If you can provide the details for the DUA, we can get that moving along now since it takes CMS up to 4 weeks to process. However, if you require the BAA beforehand, then we will see if we can rush it with our legal team and security officer. We thought we might already have one in place in our health system somewhere but so far, have come up with nothing. Yes, I am in agreement regarding the milestones and will get started on creating that list as well as a timeline of POC to contract.

I'm sorry, but I am unable to find a document to sign that you sent us months ago for the POC and have searched through my saved files and emails. I do have a PRM Analytics License cost proposal though, but there is no reference of the POC in it and nowhere to sign.

Kind Regards,

Mary Burkholder, MBA, Population Health Lead Data Analyst | WellSpan Health | (717)851-3017 | 3421 Concord Road | York, PA 17402 Plant flowers in others' gardens and your life becomes a bouquet

-----Original Message-----

From: Mark McCurry [mailto:mark@catalystapartners.com]

Sent: Monday, January 16, 2017 2:54 PM

To: Burkholder, Mary <mburkholder2@wellspan.org>; David Pierce <david.pierce@milliman.com>; Art Wilmes <art.wilmes@milliman.com>

Cc: Thomas, Kristin C <kthomas6@wellspan.org>

Subject: Re: Milliman follow up

Mary

Thank you for the heads up on the BAA. Assume if we are to enter into a contract we will need to execute the BAA so if it is not too cumbersome on your side we should probably proceed with getting this completed. We also need to get our agreement signed for the POC, so assume you will have someone at Wellspan sign the agreement we submitted to you several months ago? We also should set up a 60-day plan for meeting your expectations, the plan can be milestone based. If you are in agreement can you take cut at providing me with a list of milestones you would like to see accomplished from start to finish of the POC? Also once the POC is completed to your satisfaction then can you provide me guidance on timing for getting triggering a standard agreement in place.

Thank you for your help.

Kind Regards,

Mark

Mark McCurry, General Partner
Catalysta Partners, LLC
919-247-5005
mark@catalystapartners.com
www.catalystapartners.com

On 1/16/17, 2:32 PM, "Burkholder, Mary" <mburkholder2@wellspan.org> wrote:

Hello all -

I just learned that we don't need the BAA for this proof of concept, because the DUA from CMS will suffice.

Can you provide the Individual's name to be used on the DUA? For example, is it David Pierce? The phone number for the designated person?

Organization Name - Milliman, Inc.

Street Address

City, State, Zip

Email

We will complete these fields and send to you for signature.

Thank you.

Kind Regards,

Mary Burkholder, MBA, Population Health Lead Data Analyst | WellSpan Health | (717)851-3017 | 3421 Concord Road
| York, PA 17402

Plant flowers in others' gardens and your life becomes a bouquet

-----Original Message-----

From: David Pierce [mailto:david.pierce@milliman.com]

Sent: Thursday, January 12, 2017 4:54 PM

To: Burkholder, Mary <mburkholder2@wellspan.org>; Thomas, Kristin C <kthomas6@wellspan.org>

Cc: Mark McCurry <mark@catalystapartners.com>

Subject: FW: Milliman follow up

Mary and Kristin,

It was great meeting with you today. Attached is a redline of the BAA you sent. If you have any questions, you can reach out to myself or our legal counsel Jay Spencer (jay.spencer@milliman.com, +206 504 5839 Office). Thank you.

David Pierce
Director of Operations, PRM Analytics
Milliman
111 Monument Circle, Suite 601
Indianapolis, IN 46204 USA

+317 524 3578 Office

milliman.com

-----Original Message-----

From: Jay Spencer

Sent: Tuesday, January 10, 2017 6:42 PM

To: David Pierce <david.pierce@milliman.com>

Cc: Art Wilmes <art.wilmes@milliman.com>

Subject: RE: Milliman follow up

David,

Here is my redline of this BAA. Feel free to provide my contact info to South Central if they want to discuss further.

Jay Spencer
Counsel

Milliman
1301 Fifth Avenue, Suite 3800
Seattle, WA 98101

+206 504 5839 Office

+206 795 8907 Mobile

-----Original Message-----

From: David Pierce
Sent: Tuesday, January 10, 2017 7:28 AM
To: Jay Spencer <jay.spencer@milliman.com>
Cc: Mark McCurry <mark@catalystapartners.com>; Art Wilmes <art.wilmes@milliman.com>
Subject: FW: Milliman follow up

Jay,

We received this BAA from a prospect that we are hopefully going to move into a trial soon. Can you review and see if it is acceptable? Thank you and Happy New Year.

David Pierce
Director of Operations, PRM Analytics
Milliman
111 Monument Circle, Suite 601
Indianapolis, IN 46204 USA

+317 524 3578 Office

milliman.com

-----Original Message-----

From: Burkholder, Mary [mailto:mburkholder2@wellspan.org]
Sent: Monday, January 09, 2017 2:24 PM
To: Mark McCurry <mark@catalystapartners.com>
Cc: David Pierce <david.pierce@milliman.com>
Subject: RE: Milliman follow up

Hello Mark and David,

Attached is our BAA (Business Associate Agreement). It is with SCP (South Central Preferred) which is WellSpan's Health Management Solution. Please review, sign and return at your convenience. As a follow-up, do you have time this Thursday at 4:30 EST for a 30 minute call? I've asked Kristin Thomas to join us.

Kind Regards,

Mary Burkholder, MBA, Population Health Lead Data Analyst | WellSpan Health | (717)851-3017 | 3421 Concord Road
| York, PA 17402 Plant flowers in others' gardens and your life becomes a bouquet

-----Original Message-----

From: Mark McCurry [mailto:mark@catalystapartners.com]
Sent: Monday, January 09, 2017 12:01 PM
To: Burkholder, Mary <mburkholder2@wellspan.org>
Cc: david.pierce@milliman.com
Subject: Re: Milliman follow up

Mary

My fault it was showing up at 11 pacific. Are you available at 2pm?

Sorry for the mix up.

Mark

Mark McCurry, General Partner
Catalyst Partners, LLC
919-247-5005
mark@catalystpartners.com
www.catalystpartners.com

On 1/9/17, 11:06 AM, "Burkholder, Mary" <mburkholder2@wellspan.org> wrote:

Hello Mark and David,
Is this call at 11AM eastern time or central time?

Kind Regards,

Mary Burkholder, MBA, Population Health Lead Data Analyst | WellSpan Health | (717)851-3017 | 3421 Concord Road | York, PA 17402
Plant flowers in others' gardens and your life becomes a bouquet

-----Original Message-----

From: Mark McCurry [mailto:mark@catalystpartners.com]
Sent: Friday, January 06, 2017 1:13 PM
To: Burkholder, Mary <mburkholder2@wellspan.org>
Cc: david.pierce@milliman.com
Subject: Re: Milliman follow up

Mary

I look forward to speaking with you on Monday at 11am . Call should last about 30 minutes. David Pierce will also be joining the call .

Have a great weekend

Mark

Sent from my iPhone

> On Jan 6, 2017, at 8:58 AM, Burkholder, Mary <mburkholder2@wellspan.org> wrote:

>

> I am available between 11AM and 1PM.

> Thank you.

>

> Kind Regards,

>

> Mary Burkholder, MBA, Population Health Lead Data Analyst | WellSpan

> Health | (717)851-3017 | 3421 Concord Road | York, PA 17402 Plant

> flowers in others' gardens and your life becomes a bouquet

>

>

> -----Original Message-----

> From: Mark McCurry [mailto:mark@catalystapartners.com]

> Sent: Friday, January 06, 2017 11:31 AM

> To: Burkholder, Mary <mburkholder2@wellspan.org>

> Cc: david.pierce@milliman.com

> Subject: Re: Milliman follow up

>

> Mary

> Can you suggest a time on Monday for us to talk directly?

> I look forward to speaking with you.

>

> Kind regards

>

> Mark

>

> Sent from my iPhone

>

>> On Jan 5, 2017, at 5:20 AM, Burkholder, Mary <mburkholder2@wellspan.org> wrote:

>>

>> Hello Mark,

>> I assume that Paul McRae forwarded my email to you and yes, I can speak with you on Monday. I see that you are with Catalysta Partners? Can you explain your business relationship with Milliman?

>>

>> Kind Regards,

>>

>> Mary Burkholder,MBA, Population Health Lead Data Analyst | WellSpan

>> Health | (717)851-3017 | 3421 Concord Road | York, PA 17402 Plant

>> flowers in others' gardens and your life becomes a bouquet

>>

>>

>> -----Original Message-----

>> From: Mark McCurry [mailto:mark@catalystapartners.com]

>> Sent: Wednesday, January 04, 2017 3:56 PM

>> To: Burkholder, Mary <mburkholder2@wellspan.org>

>> Cc: Art Wilmes <art.wilmes@milliman.com>; david.pierce@milliman.com

>> Subject: Milliman follow up

>>

>> Happy New Year Mary,

>>

>> I am introducing myself via email as I am helping Milliman PRM with sales and marketing.

>> We are excited about your continued interest in PRM.

>> Do you have time for a call on Monday so that I might align and prioritize your objectives for the proposed MSSP trial ?

>>

>> I look forward to your reply

>>

>> Kind regards

>>

>> Mark

>>

>> Sent from my iPhone

>>

>> -----

>> - The information contained in this communication, including all

>> attachments, is legally protected information, confidential or proprietary information, or a trade secret intended solely for the use of the intended recipient or otherwise exempt from disclosure under applicable state and federal law, including, but not limited to, privacy standards imposed pursuant to the federal Health Insurance Portability and Accountability Act of 1996 ("HIPAA"). The information may also be subject to legal privilege. If you are not the intended recipient, you are hereby notified that any use, disclosure, dissemination, distribution, forwarding, or copying of this communication is strictly prohibited. If you have received this communication in error, please notify the sender by reply Fax or e-mail stating the communication was "received in error" and delete or destroy all copies of this communication, including all attachments.

>>

>> Message string: KqxfH=TU

>

This communication is intended solely for the addressee and is confidential. If you are not the intended recipient, any disclosure, copying, distribution or any action taken or omitted to be taken in reliance on it, is prohibited and may be unlawful. Unless indicated to the contrary: it does not constitute professional advice or opinions upon which reliance may be made by the addressee or any other party, and it should be considered to be a work in progress.
