

## Susan OConnor

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**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

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

From: Burkholder, Mary [mailto:[mburkholder2@wellspan.org](mailto:mburkholder2@wellspan.org)]  
Sent: Monday, January 16, 2017 3:15 PM  
To: Mark McCurry <[mark@catalystapartners.com](mailto:mark@catalystapartners.com)>; David Pierce <[david.pierce@milliman.com](mailto:david.pierce@milliman.com)>; Art Wilmes <[art.wilmes@milliman.com](mailto:art.wilmes@milliman.com)>  
Cc: Thomas, Kristin C <[kthomas6@wellspan.org](mailto: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](mailto:mark@catalystapartners.com)]  
Sent: Monday, January 16, 2017 2:54 PM  
To: Burkholder, Mary <[mburkholder2@wellspan.org](mailto:mburkholder2@wellspan.org)>; David Pierce <[david.pierce@milliman.com](mailto:david.pierce@milliman.com)>; Art Wilmes <[art.wilmes@milliman.com](mailto:art.wilmes@milliman.com)>  
Cc: Thomas, Kristin C <[kthomas6@wellspan.org](mailto: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](mailto:mark@catalystapartners.com)  
[www.catalystapartners.com](http://www.catalystapartners.com)

On 1/16/17, 2:32 PM, "Burkholder, Mary" <[mburkholder2@wellspan.org](mailto: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

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-----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](http://milliman.com)

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

From: Burkholder, Mary [mailto:[mburkholder2@wellspan.org](mailto:mburkholder2@wellspan.org)]  
Sent: Monday, January 09, 2017 2:24 PM  
To: Mark McCurry <[mark@catalystapartners.com](mailto:mark@catalystapartners.com)>  
Cc: David Pierce <[david.pierce@milliman.com](mailto: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](mailto:mark@catalystapartners.com)]  
Sent: Monday, January 09, 2017 12:01 PM  
To: Burkholder, Mary <[mburkholder2@wellspan.org](mailto:mburkholder2@wellspan.org)>  
Cc: [david.pierce@milliman.com](mailto: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  
Catalysta Partners, LLC  
919-247-5005  
mark@catalystapartners.com  
www.catalystapartners.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  
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-----Original Message-----

From: Mark McCurry [mailto:[mark@catalystapartners.com](mailto:mark@catalystapartners.com)]  
Sent: Friday, January 06, 2017 1:13 PM  
To: Burkholder, Mary <[mburkholder2@wellspan.org](mailto:mburkholder2@wellspan.org)>  
Cc: [david.pierce@milliman.com](mailto: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](mailto: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

>>

>> -----

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>> Message string: KqxfH=TU

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