

# Staci Gillespie, PMP

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## Summary of Qualifications

In my over 17 years of health care expertise, I have gained experience working with government health care and regulatory compliance projects which include Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health (HITECH) projects at the county, state and federal levels. I have extensive engagement experience within Medicaid programs and have led and performed regulatory and business process analysis on a multitude of compliance projects that dealt with HIPAA Privacy, HIPAA Security, HIPAA National Provider Identifier, HITECH, and Medicaid Information Technology Architecture (MITA). I have also provided expertise to public and private sector organizations regarding privacy policies for Health Information Exchange (HIE) as well as developing and leading training programs for large health care organizations.

My most recent work includes work with Truven Health Systems on the Testing Experience and Functional Tools (TEFT) in Community-Based Long Term Services and Supports (CB-LTSS) planning and demonstration technical assistance (TA) project. My responsibilities include supplying subject matter expertise and deliverable support to facilitate successful demonstration by grantees of the TEFT components. Specifically, my support focuses on the design and development of Personal Health Records for CB-LTSS recipients and an electronic LTSS standard for exchanging CB-LTSS data among providers, beneficiaries and others serving CB-LTSS beneficiaries.

My previous engagements include MITA State Self-Assessments (SS-A) in California and Hawaii. My work for both engagements included assessment of business processes against the MITA 3.0 framework (including the seven Standards and Conditions) in order to determine current levels of maturity and facilitate the roadmap for future maturity levels.

I am a certified Project Management Professional (PMP) and understand the PMBOK guide and standards, as well as how to engage them during projects. My projects have included both independent work as well as oversight of multiple team members to accomplish tasks. Likewise, I have managed multiple projects simultaneously.

## Professional History

### **September 2014 – Current** **SMG Consulting, LLC (Owner)**

My company, SMG Consulting, LLC, provides health care consulting services to federal, state, county, and private clients as referenced below.

#### **October 2014 – Current**

##### **Centers for Medicare and Medicaid / Truven Health Analytics, TEFT Demonstration Grant Technical Assistance Project**

Working as a consultant with Truven Health Analytics on the Testing Experience and Functional Tools (TEFT) in Community-Based Long Term Services and Supports (CB-LTSS) planning and demonstration technical assistance (TA) project. The TEFT initiative furthers adult quality measurement activities under Section 2701 of the Patient Protection and Affordable Care Act. Responsibilities include supplying subject matter expertise and deliverable support on the following components of the TEFT Demonstration TA contract to assist in meeting the goals of the TEFT Demonstration program:

- The provision of TA to Grantees and CMS related to areas of health information technology (HIT) including health information exchanges, electronic health records, personal health records, interoperability and standards.
- The provision of TA to Grantees to demonstrate use of PHR systems with beneficiaries of CB-LTSS. The PHR is intended to provide CB-LTSS grantees with a range of personal LTSS and health information to facilitate decision making about care. The PHR can encourage a more active role for beneficiary/caregivers in managing care and result in better outcomes through more efficient management of services.
- The provision of TA to Grantees participating in the Office of National Coordinator's (ONC) Standards and Interoperability (S&I) Framework for the development, testing and piloting of a new electronic standard for an eLTSS record.

**March 2015 – Current****Maryland CRISP HIE Policy Subject Matter Expert**

Currently working as a consultant with Health Management Associates (HMA) on a policy framework for health information exchange for Maryland's designated HIE, the Chesapeake Regional Information System for Our Patients (CRISP). Services provided to CRISP include the design of a framework that includes privacy and security policies and technological specifications that provide for safe and secure exchange of individual health information.

**February 2015 – March 2015****Anthem Blue Cross Blue Shield**

Worked as a consultant with HMA on a privacy and security project for Anthem Blue Cross Blue Shield. Created a privacy and security legislation tracker and response profile for use by policy analysts and attorneys at Anthem. The profile was updated with current privacy and security legislation across the country, as well as anticipated legislation in response to the recent breach at Anthem. The profile also included a suggested response by Anthem to each piece of legislation.

**September 2001 – September 2014****Hubbert Systems Consulting, Inc. (HSC)/ Acquired by Public Consulting Group (PCG) in 2014**

Providing health care consulting services to federal, state, and county clients as referenced below.

**October 2013 – April 2014****Solano County Compliance Assessment**

*Project Manager/Project Lead/Analyst*

Worked on compliance project for Solano County where I am the project manager, lead, and analyst. Managed a multi-phased project aimed at measuring Solano County privacy and security compliance, billing compliance, and Electronic Health Record (EHR) Incentive Program compliance. Work included recommendations for policy, business processes, and overall compliance program.

**February 2013 – October 2013****State of Hawaii MITA State Self-Assessment (SS-A)**

*Senior Business Analyst*

Worked on the Hawaii MITA SS-A project where I am assisting in the evaluation of each business process against the MITA Version 3.0 Framework (Business Capability Matrices) to establish the current maturity of Hawaii's Medicaid program.

**January 2013 – June 2013****State of Indiana Medicaid HIT IAPD and SMHP Update**

*Senior Business Analyst*

Worked with the State of Indiana to update both the Medicaid Health Information Technology and Exchange Implementation Advance Planning Document (HIT IAPD) and the State Medicaid HIT Plan (SMHP) as required by the Centers for Medicare and Medicaid (CMS) as it relates to the Electronic Health Record (EHR) Incentive Program and the Health Information Exchange (HIE) initiative.

**November 2012 – January 2013****State of Tennessee Medicaid HIT IAPD and SMHP Update**

*Project Analyst*

Worked with the State of Tennessee Health Care Finance and Administration (HCFA), Division of Information Services to update both the Medicaid Health Information Technology and Exchange Implementation Advance Planning Document (HIT IAPD) and the State Medicaid HIT Plan (SMHP) as required by the Centers for Medicare and Medicaid (CMS) as it relates to the Electronic Health Record (EHR) Incentive Program and the Health Information Exchange (HIE) initiative.

**August 2012 – December 2012****Infocrossing MMIS Assessment and MMIS Roadmap**

*Senior Business Analyst*

Team member tasked with developing and documenting a Medicaid Management Information System (MMIS) Roadmap: a blueprint for enhancing the capabilities of the existing MMIS, in keeping with recent CMS guidance— including version 3.0 of MITA and the seven standards and conditions for information system development.

Responsibilities included:

- Conducting documentation review in support of the assessment of existing MMIS capabilities against capability maturity targets set forth in version 3.0 of MITA

- Evaluating each business process against the MITA Framework to establish the current maturity of Infocrossing's MMIS;
- Interviewing and surveying representatives of the business processes covered to gather information as necessary to complete the deliverable document;
- Participating in strategizing/visioning sessions with MMIS staff to complete the development of an MMIS Roadmap

#### **September 2011 – June 2013**

##### **US Centers for Medicare and Medicaid (CMS)**

##### **HITECH Evaluation Project – Electronic Health Records (EHR) Incentive Program**

###### *Project Analyst*

Acted as a team member who was providing project management, business process, and subject matter expertise to develop and deliver the CMS HITECH Evaluation for the EHR Incentive Program. Responsibilities included identifying and documenting State Medicaid EHR business processes, systems and technology platforms, quality management activities, stakeholders and exchange partners, and current and future initiatives in order to measure the current maturity of the state's EHR Incentive Program.

This project also included a separate study on the participation of Federally Qualified Health Centers (FQHC) in the EHR Incentive Program. Working with CMS and the National Association of Community Health Centers (NACHC), responsibilities of this study included:

- Gathering and documenting existing information regarding the early adoption of EHR systems by FQHC's
- Identifying promising practices that both CMS and NACHC can utilize in the promotion of this program
- Conducting interviews with the following participants: State Medicaid Agencies, Regional Extension Centers (REC) and Primary Care Associations (PCA).

#### **January 2011 – February 2012**

##### **Hubbert Systems Consulting, Inc. (HSC) / State of California, Office of Health Information Integrity (CalOHII), Health Information Exchange (HIE) Demonstration Projects**

###### *Project Manager / HIE Subject Matter Expert*

Responsibilities included:

- Assisting the eHealth Branch in the design and development of privacy and security regulations and/or policies for the implementation of electronic health information exchanges (HIE) for the health care industry and the demonstration projects for the electronic exchange of health information to be carried out by public and/or private entities as identified by CalOHII;
- Providing expertise on federal and state rules as they apply to the electronic exchange of health information;
- Analyzing areas of major risk or other issues/concerns as identified by CalOHII, developing scope sheets and/or issue papers; and
- Managing all phases of demonstration projects for the electronic exchange of health information to ensure compliance with goals and requirements of AB 278.

#### **November 2008 - December 2010**

##### **Hubbert Systems Consulting, Inc. (HSC) / State of California, Office of Health Information Integrity (CalOHII), HIPAA and Health Information Exchange (HIE) Consulting Support Services**

###### *Health Policy Analyst / Privacy Policy Analyst*

Responsibilities included:

- Assisting CalOHII in the design and development of a privacy and security standards framework for California's implementation of electronic HIE;
- Researching and analyzing national and state privacy policy issues and trends;
- Tracking and monitoring the progress of California's HIE efforts;
- Providing assistance to the CalOHII staff Counsel including research on federal and California state laws;
- Researching and providing analysis of health information exchange operations and issues;
- Facilitating the California Privacy and Security Advisory Board (CalPSAB) Task Groups in their assignment of reviewing specific scenarios related to California health information exchanges;
- Leading CalPSAB Task Groups in weekly meetings including solicitation of private and public industry members, preliminary research and documentation, meeting preparation, issue tracking, and final documentation preparation;
- Preparing analytical documentation which defines an issue or question (including background) and the analysis methodology, and includes full analyses of the issue/problem;

- Providing assistance with education and outreach activities including preparation of handouts, PowerPoint presentations, and supporting documentation;
- Editing final draft products (work products, tools, and templates) and policies for accuracy, readability and structure;
- Managing HIE demonstration projects;
- Developing website content for patient and provider education webpages including frequently asked questions, video links, news links, and state and federal law resources; and
- Preparing requests for proposals and memorandums of understanding for the demonstration projects.

#### **June 2007 - March 2008**

##### **HSC / State of California, Department of Health Care Services (DHCS) MITA Self-Assessment Project**

*Senior Business Analyst*

Responsibilities included:

- Identification and confirmation of organizational inventory and contacts, allocating business processes, building preliminary and future views, interviewing state business owners and subject matter experts, and document key planning influences;
- Developing a State Self-Assessment tool, using the MITA Framework provided by US Centers for Medicare and Medicaid Services (CMS), to evaluate the maturity of California's Medicaid program;
- Identify and document state Medicaid business processes, systems and technology platforms, stakeholders and exchange partners, current and future initiatives;
- Mapping Medi-Cal business processes to the MITA framework, determining current MITA maturity levels;
- Creating a 5-year and 10-year view of the maturation of California's Medicaid program;
- Interviewing and surveying representatives of the business processes covered to gather information as necessary to complete the deliverable document;
- Conducting interviews to inventory each business process and map to the MITA Framework (Business Process Models); and
- Evaluating each business process against the MITA Framework (Business Capability Matrices) to establish the current maturity of California's Medicaid program.

#### **June 2006 – June 2007**

##### **HSC / State of California, Department of Health Services (DHS) HIPAA Projects**

*HIPAA Privacy Training Officer & HIPAA Subject Matter Expert*

Responsibilities included:

- Developing HIPAA Privacy training materials, incorporating other state and federal law, for all DHS staff covered by HIPAA;
- Performing audits of business areas prior to training to address area-specific issues directly in training sessions;
- Delivering statewide HIPAA Privacy training to each HIPAA covered business area; and
- Evaluating materials and retention.

#### **December 2003 – June 2006**

##### **HSC / State of California Health and Human Services Agency and Labor and Workforce Development Agency**

*HIPAA Privacy & Security Business Analysts & HIPAA Subject Matter Expert*

- Providing HIPAA expertise as it relates to the HIPAA Privacy & Security Rules in order to perform a gap analysis for Alcohol and Drug Program, Department of Aging, Department of Health Care Services, Department of Development Services, Department of Social Services, Managed Risk Medical Insurance Board, and Employment Development Department;
- Organizing and conducting interviews of impacted areas to uncover detailed information in regards to areas of HIPAA compliance and non-compliance; and
- Providing documentation of findings that identifies risks and assists clients in remediation decisions.

#### **July 2002 – January 2004**

##### **HSC / Multiple California Counties**

*HIPAA Privacy Subject Matter Expert*

Responsibilities included:

- Providing Privacy expertise as it relates to the HIPAA Privacy Rule for multiple CA counties including Madera, Alameda, Calaveras, and Solano;

- Perform gap analysis for county departments and programs;
- Configure and implement privacy policies and procedures in the health care components;
- Creating a HIPAA Privacy Manual that documents each part of the regulation and the policies, procedures and forms that are required for each of the health care components.
- Providing documentation of findings that identifies risks and assists counties in remediation decisions; and
- Organizing weekly team meetings to develop policies, procedures and forms required for HIPAA compliance of impacted areas;
- Providing sample documentation at weekly meetings to review and edit for county approval; and
- Organizing interviews of impacted areas to uncover detailed information in regards to areas of HIPAA compliance and non-compliance; and
- Researching industry interpretations of the HIPAA Privacy Rule as it applies to the counties' impacted areas.

#### **January 2002 - June 2002**

#### **HSC / State of California, Department of Health Services, Office of HIPAA Compliance (OHC)**

##### *Privacy Support*

Responsibilities included:

- Providing Privacy expertise and support as it related to the HIPAA Privacy Rule;
- Assisting in DHS policy creation related to the HIPAA Privacy Rule and its impact on the different DHS program areas; and
- Analyzing the impact of the Privacy rule on DHS and the fundamental requirements to implement policies.

#### **August 2001 - December 2001**

#### **HSC / State of California, Department of Health Services, Office of HIPAA Compliance (OHC)**

##### *Issues Coordinator*

Responsibilities included:

- Redesigning the OHC HIPAA Issues Tracking System (HITS) which included inputting data, reviewing issues for consistency and completeness, running reports for OHC staff, ensuring that responsibility for each issue had been assigned to the appropriate person, and determining that each issue has a resolution path;
- Coordinating with program areas liaisons (PALs), state and other HIPAA workgroups, HIPAA steering committee, and State executive staff to review issues and document resolution paths; and
- Organizing, scheduling and conducting workshops to train users on the Issues Database.

#### **August 1999 - August 2001**

#### **Sutter Medical Foundation**

##### *Programmer/Analyst*

Responsibilities included:

- Report writing as requested by Sutter Medical Foundation directors, managers, supervisors, and physicians using primarily SQL Server 7.0, IDX, Access, and Excel;
- Aid in the implementation of a data warehouse as designed by Sutter Medical Foundation directors and IT staff;
- Creation and documentation of applications in Seagate 7.0 for use by employees of Sutter Medical Foundation;
- Ensuring data integrity, identifying issues and errors, and documenting findings/corrective action plans for management;
- Performing all tasks (create tables, queries, problem solve) required to convert system reports to the data warehouse; and
- Creating, implementing, and documenting project plans to correct system issues as correlated to reporting needs.

#### **April 1999 - August 1999**

#### **Sutter Connect**

##### *Capitation and Enrollment Accountant and Analyst*

Responsibilities included:

- Developing and maintaining all databases associated with enrollment and capitation for managed care, including all Sutter affiliations (Sutter West, Sutter Medical Group, Sutter Santa Rosa, Sutter Gould, Sutter Independent Physicians, Sutter Redwoods);
- Managing all capitation dollars, while investigating and documenting all discrepancies of substantial value for upper management;
- Creating all databases for capitation reconciliation with each of the contracted health plans; and
- Researching contractual obligations for each of the contracted health plans and audited payments and deductions to assure correctness and accuracy.

**November 1998 - April 1999**

**CHW Medical Foundation**

*Programmer*

Responsibilities included:

- Programming reports in SAS, SQL, Select/IQ, and Access for all departments in CHW, including Utilization Review, Eligibility, Claims, Provider Management, Quality Review, and all management as requested;
- Creating production reports for administrative managers and upper management on a monthly basis and automated where possible;
- Aid in the data warehouse development for Eligibility and Capitation; and
- Leading the HEDIS project for reporting clinical data by MedClinic of Sacramento.

**March 1997 - November 1998**

**CHW Medical Foundation**

*Supervisor of Patient Benefit Administration Department*

Responsibilities included:

- Supervising a staff of eleven on all eligibility input, electronic and manual, and all lines of business, HMO, PPO, POS, EPO, Medicare, Medical, and Fee for Service;
- Managing weekly output, backlog, and timeliness on registrations for sixteen clinic sites;
- Managing database tables for benefits, carrier information, employer group information, provider information, and supplemental insurance;
- Devising better tools to manage the accuracy of three databases, HSII, Cycare, and Stolas, to ensure correct billing process; and
- Working with coordinated communications with multiple directors, managers, and supervisors as a member of the Core Process Redesign Team to build a better flow for the front office and billing processes.

**September 1995 - March 1997**

**CHW Medical Foundation - Sacramento, CA**

*EDI Specialist*

Responsibilities included:

- Creating of EDI enrollment process for multiple Health Plans on the HSII system;
- Overseeing IT staff at multiple Health Plans to create, improve, and secure EDI process of loading enrollment data and returning encounter data; and
- Creating programs to update patient demographics and insurance information.

## **Education / Industry Involvement / Training**

### **Education**

University of California, Davis

*Bachelor of Science, Human Development*

St. Mary's College

*Major Course of Study: Biological Sciences*

### **Industry Involvement**

Member of the Healthcare Information and Management Systems Society (HIMSS)

Participant in the Workgroup for Electronic Data Interchange

Participant in the California State Associate of Counties

Project Management Institute (PMI) Member

### **Certifications/Training**

Project Management Institute – Project Management Professional

