

**EDIFECS®**

Customer Leadership Summit '11

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6.625 x 11.25 inches

*Engage, Learn and Celebrate*

Harvest Inn, Napa Valley

May 24 – 26



## Welcome to the 2011 Customer Leadership Summit

On behalf of everyone at Edifecs, I would like to welcome you to beautiful Napa Valley and our 2011 Customer Leadership Summit (CLS).

Now in its third year, the Summit is continuing its tradition of bringing together some of the best minds in healthcare technology to discuss the challenges facing the industry and the ways our customers can use Edifecs solutions to overcome them.

As you leaf through this program guide, you'll see the agenda, speakers' bios and other information to help you navigate each day's activities. We've taken great care to strike a perfect balance among business discussions, technology deep dives and real-world case studies to ensure you get maximum value from this year's Summit.

We've also built ample time into the schedule for networking and relationship building. Wednesday's evening event will be an unforgettable, close-up look at winemaking, with a little fun and competition thrown in. That's all I can say at this point, but you definitely won't want to miss it.

As always, your active participation and feedback is essential to making this year's CLS as valuable and thought-provoking as possible. Consider your time spent over the next two days to be an investment in the relationships, technology and business insight that will contribute to your professional and organizational success.

My goal during this event is to have a personal discussion with each of you about the state of your business, your aspirations for the next few years and how Edifecs can continue to be a trusted partner. There can be no greater measure of our success than an enthusiastic recommendation from an Edifecs customer, so feel free to find me during the Summit for a candid conversation about how we're doing.



Again, welcome!

Sunny Singh  
CEO, Edifecs

# | Agenda

Wednesday, May 25

Meeting room: Fountain View Room (unless otherwise noted)

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**7:00 AM Breakfast**

Location: Wine Country Kitchen

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**8:15 AM Edifecs 2010: Year in Review**

Speaker: Sunny Singh, CEO – Edifecs

See what Edifecs was up to in 2010. Session will include customer, product and revenue summaries, followed by an overview of Edifecs' vision for healthcare solutions.

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**9:00 AM Customer Case Study: Blue Cross Blue Shield of Kansas City**

Speaker: Jim Nichols, EDI Manager – Blue Cross Blue Shield of Kansas City

Hear how Blue Cross Blue Shield of Kansas City leveraged Edifecs products to become the top Missouri Medicaid Managed Care plan for encounter acceptance rates. You'll also learn how the organization is gearing up to face ICD-10 and Healthcare Reform.

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**9:40 AM Break**

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**9:50 AM Customer Case Study: Premera Blue Cross**

Speaker: Martin Strand, Senior Manager of IT Applications – Premera Blue Cross

Hear how Premera Blue Cross is using Edifecs solutions to meet compliance mandates, achieve its organizational goals and meet upcoming industry challenges.

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**10:30 AM Impact of Healthcare Regulations**

Speaker: Herb Larsen, Principal of Healthcare Industry Strategy – Edifecs

An interactive discussion that looks at how the changing regulatory landscape (including Healthcare Reform), medical loss ratio requirements and operating rules are impacting health plans.

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**12:00 PM Lunch Hour Discussion**

Location: Fountain View Terrace

Discuss your unique business challenges and strategic initiatives with your peers in these four areas:

- ICD-10 Testing
  - Healthcare Reform
  - Operating Rules
  - Accountable Care Organizations and the impact of Patient-Centered Medical Homes on payers
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**1:00 PM Healthcare Trends and Challenges**

Speaker: John McCandlish, Principal of Healthcare Solutions – Edifecs

The discussion continues with a focus on key trends and industry developments that pose business and technical challenges for health plans, including new relationships with providers and consumers.

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**2:30 PM Break**

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***BREAKOUT SESSIONS – Choose between:***

**2:45 PM Edifecs Focus Group**

Location: Vineyard View Room

Moderator: Sanjay Puri, Vice President of Product Marketing – Edifecs

Engage with your peers in a focused discussion on best practices for ICD-10, as well as ways Edifecs can help healthcare organizations with their ICD-10 migration.

**2:45 PM Edifecs Product Demonstrations**

To see these Edifecs solutions in action, go to the designated room:

**ICD-10 Solution** – Board Room

**Unified Operations** – Fountain View Room

**Unified Testing** – Fountain View Room

**Unified Visibility** – Fountain View Room

**Unified Compliance** – Fountain View Room

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**3:30 PM Break**

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**3:45 PM Informal Discussion / Open Mic Session**

Share your feedback and engage in an open discussion with the Edifecs team.

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**5:45 PM Transportation Departs for Alpha Omega Winery**

Location: Meet in front of Harvest Inn registration building

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**6:00 PM CLS 2011 Celebration Dinner**

Location: Alpha Omega Winery

Testing, tasting and teamwork. What do these three things have in common?  
Experience this fun and interactive evening to find out for yourself.

# | Agenda

Thursday, May 26

Meeting Location: Fountain View Room (unless otherwise noted)

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**7:00 AM Breakfast**

Location: Wine Country Kitchen

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**8:15 AM Edifecs Product Strategy Overview**

Speaker: Vik Sachdev, Vice President of Product Management – Edifecs

Learn how the Edifecs Unified Channel helps healthcare organizations manage business processing, validation and visibility at the front end of the enterprise.

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**8:45 AM Edifecs Product Roadmap - ICD-10 Solution**

Speaker: Ryan McDermitt, Senior Director of Product Management – Edifecs

Learn about and discuss a strategic solution for mitigating ICD-10 risks and accelerating your ICD-10 migration projects.

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**9:25 AM Break**

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**9:35 AM Edifecs Product Roadmap - Unified Testing**

Speaker: Sourabh Sinha, Director of Product Management – Edifecs

Learn about and discuss a comprehensive solution for healthcare transaction testing, particularly for 5010 and ICD-10 projects.

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**10:15 AM Edifecs Product Roadmap - Unified Visibility**

Speaker: Robert Bunch, General Manager of the Blues Sector – Edifecs

Learn about and discuss an ideal solution for gaining real-time visibility into transaction activity across all channels at the front end of the enterprise.

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**10:55 AM Break**

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**11:05 AM Edifecs Product Roadmap - Unified Operations**

Speaker: Robbi McClane, Senior Director of Product Management – Edifecs

Learn about and discuss a critical solution that helps you take control of your healthcare business processes, such as enrollment and claims management.

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**11:45 AM Lunch**

Location: Fountain View Terrace

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**12:45 PM Edifecs Product Roadmap - Unified Compliance**

Speaker: Vik Sachdev, Vice President of Product Management – Edifecs

Learn about and discuss a core solution for improving healthcare transaction workflow and ensuring ongoing compliance of production information with government mandates.

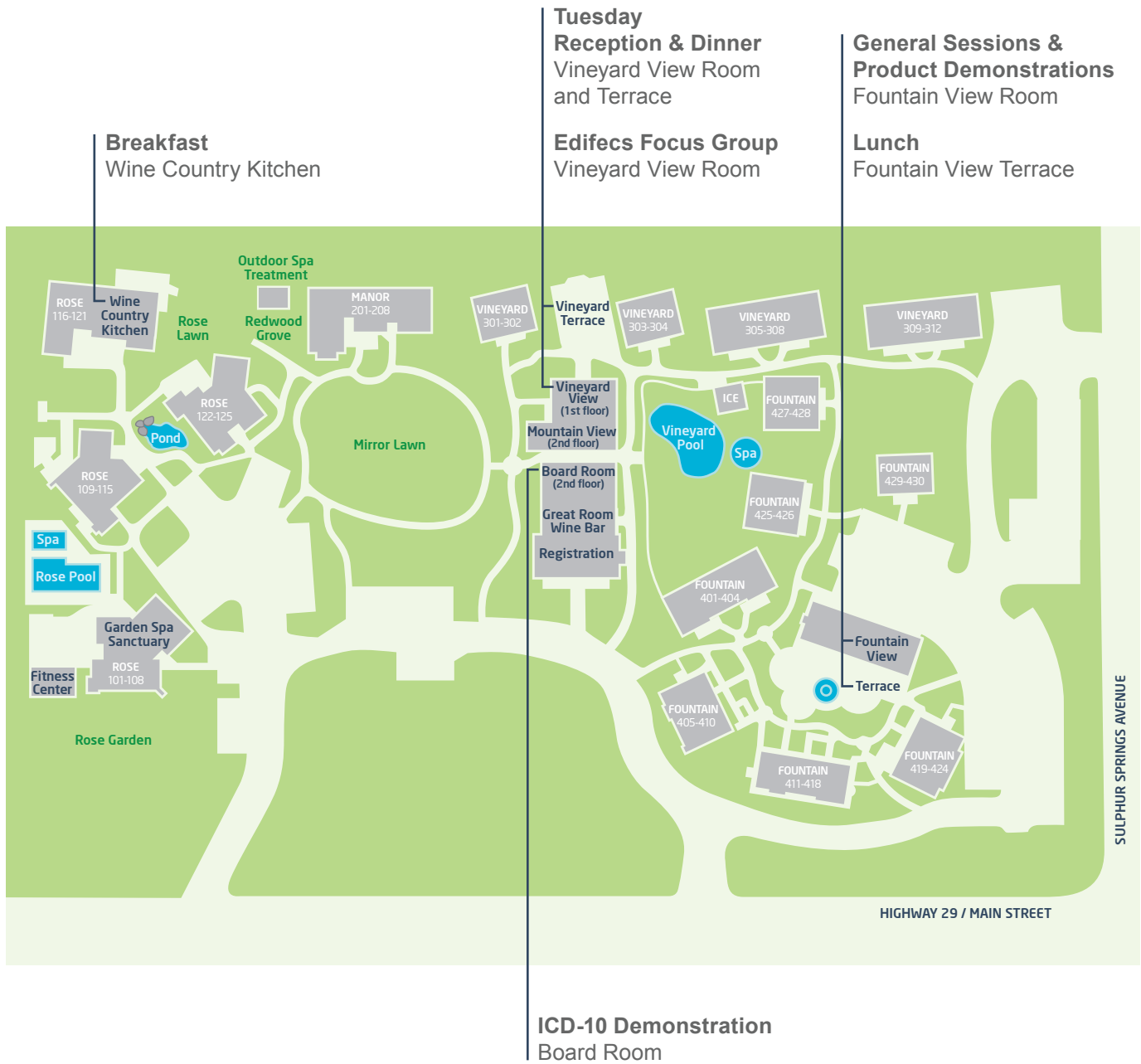
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**1:25 PM Event Wrap-up / Closing**

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**2:00 PM Meeting Adjourns**

# Harvest Inn Map



## | Speaker Biographies



**Jim Nichols**

EDI Manager

Blue Cross and Blue Shield of Kansas City

Jim Nichols manages the teams responsible for all EDI transactions at Blue Cross and Blue Shield of Kansas City. He joined Blue Cross and Blue Shield of Kansas City in 1989 after attending Southwestern University in Georgetown, Texas and the University of Central Missouri, earning an undergraduate degree in Secondary Education and Business Administration. Nichols' past 22 years at Blue Cross and Blue Shield of Kansas City have allowed him to work and serve in the following areas of the organization: operations, customer service, provider relations and IT. Outside of work, Nichols stays busy with his family, church, trout fishing, hunting, and helping out on the family farm.



**Martin Strand**

Senior Manager of IT Applications

Premera Blue Cross of Washington and Premera Blue Cross Blue Shield of Alaska

Martin Strand has 30 years of healthcare experience at Premera, serving in management and non-management positions within Business Operations and IT. Strand currently manages teams accountable for EDI operations, as well as EDI, Blue Card, Blue Exchange and Federal Employee Program Application systems development. He is the project owner for the HIPAA 5010 implementation and is accountable for overall delivery. Strand has been involved in EDI since 1991 in both technical and management roles, including serving as EDI Project Lead for the HIPAA 4010a1 implementation in 2003, where he was accountable for requirements, QA testing, trading partner testing and migration.



## Edifecs Team Biographies



**Sunny Singh**  
President and CEO

As president and CEO of Edifecs, Sunny Singh is responsible for setting the strategic direction of the company and ensuring Edifecs continues to develop innovative solutions to solve the healthcare industry's administrative cost and simplification challenges.

Since founding the company 15 years ago, Singh has grown Edifecs into a profitable, self-funded, employee-owned company with no debt. It is one of the fastest-growing companies in the country.

Prior to founding Edifecs, Singh was a software and industrial engineering expert who spent his early career solving supply chain and enterprise integration problems while working for companies such as Microsoft and Expeditors International. He is a frequent speaker and has testified to the National Committee on Vital and Health Statistics—the advisory body to the Department of Health and Human Services on health data, statistics and national health information policy—regarding the ongoing need for cutting-edge compliance testing in the arena of healthcare EDI and e-Commerce.

Singh has been honored with multiple awards, including the 40-under-40 award for outstanding leadership and entrepreneurship in the Puget Sound area, the 2010 WEDI Leadership in Technology award, as a finalist for the 2011 Leader in Healthcare award from Seattle Business magazine, and as a finalist for the 2011 Ernst & Young Entrepreneur of the Year award for the Pacific Northwest.

Singh earned his bachelor's degree from IIT-Delhi and holds dual master's degrees in Computer Science and Industrial Engineering from Montana State University. Outside the office, he enjoys traveling, photography, reading and golfing.



**Manish Kedia**  
Senior Vice President of Business Development & Strategic Customers

Manish Kedia is responsible for managing key relationships with Edifecs' strategic customers and building effective customer engagement programs.

Prior to Edifecs, Kedia was the managing partner and president of Industry Verticals at Nexvisionix (a Managed Gold-certified Microsoft Partner), where he was responsible for the product and services business across multiple industries, including healthcare.

Before Nexvisionix, Kedia was director of Global Partners Strategy at Microsoft, where he focused on channel development for the Microsoft SQL Server product. He also led Microsoft's CRM and BI initiative, engaging more than 35 million IT professionals, and established the consulting services strategy.

Kedia earned his bachelor's degree in Computer Engineering from the University of Bombay in India and studied business management at the Wharton School of the University of Pennsylvania. Kedia enjoys several outdoor activities in the Pacific Northwest and loves to travel with his family.

## Edifecs Team Biographies



**Sajal Mukherjee**

Senior Vice President of Product Engineering & Marketing

Sajal Mukherjee is an experienced business leader with more than 25 years of experience in the software industry. At Edifecs, he is responsible for ensuring the company's products and services evolve based on market needs and then achieving product line profitability across the entire portfolio.

Throughout his career, Mukherjee has played a wide variety of product management, operations, sales, and solution delivery roles. Most recently, he was senior vice president of Product Development at Oracle, leading development of its financial services software and next-generation banking products. He successfully established market presence for i-flex Solutions in North America, prior to its acquisition by Oracle.

Mukherjee earned his bachelor's degree in Electrical and Electronics Engineering from Nagpur University in India. He received a Certificate in Executive Leadership from Cornell University and graduated from the Executive Program at Harvard Business School. Mukherjee lives with his family on the East Coast, where he is an active promoter of (and occasional participant in) South Asian theater. His other passions are music and literature.



**Jamie Gier**

Vice President of Corporate Marketing

Jamie Gier leads Corporate Marketing at Edifecs and is responsible for brand strategy, public relations, analyst relations, corporate events, and online communities. She has built a 15-year career marketing healthcare technologies, including enterprise EMRs, data aggregation solutions and decision support software. She has extensive experience working with healthcare organizations, ranging from physician practices to large health systems, as well as other industry stakeholders across the healthcare spectrum.

Prior to joining Edifecs, Gier held executive-level positions building and managing brands at Microsoft, GE Healthcare, IDX Systems Corporation and several private healthcare and medical device companies. She also served as co-lead on marketing integration for two major industry acquisitions: GE/IDX and Microsoft/Sentillion.

Gier graduated Summa Cum Laude from Washington State University with a bachelor's degree in Communication.



**Sanjay Puri**

Vice President of Product Marketing

Sanjay Puri leads the Product Marketing team at Edifecs, where he is a key architect of Edifecs product positioning and messaging to the market. During his nearly 20-year career, he has developed significant expertise in enabling sales organizations to sell enterprise software solutions.

Prior to joining Edifecs, Puri was director of Product Marketing at Hewlett-Packard, where he drove content strategy, community engagement and overall product marketing activities. Puri joined HP as part of its acquisition of iConclude, a Bellevue, Washington startup. Prior to iConclude, Puri served as a group marketing manager at Microsoft and led the engineering team for Oracle's Health & Safety product line.

Puri holds a bachelor's degree in Electronics Engineering from the Indian Institute of Technology in India, as well as an MBA from the Kellogg School of Business at Northwestern University. Outside of work, Puri loves to spend time with his family, enjoys golf and is a martial-arts movie buff.

## Edifecs Team Biographies



**Piyush Pushkar**

Vice President of Solution Consulting & Strategic Alliances

Piyush Pushkar leads the Solution and Business Consulting teams at Edifecs and is also responsible for strategic alliances. He is tasked with helping Edifecs customers design the specific solution architecture to meet their business needs and developing key partnerships to drive market acceptance of Edifecs products and services.

Prior to joining Edifecs, Pushkar spent more than 15 years with companies such as Wipro Technologies, Gap Inc., and Genesys, leading strategic architecture teams in designing and building products and solutions. His experience includes providing IT solutions in the healthcare, insurance, banking and retail industries.

Pushkar earned a bachelor's degree in Electronics and Telecommunications Engineering and received his MBA from the Wharton School of the University of Pennsylvania. Outside of the office, Pushkar has a love of photography and is a voracious reader.



**Vik Sachdev**

Vice President of Product Management

Vik Sachdev is responsible for ongoing management and development of the Unified Compliance product line at Edifecs. He joined the company in 1998 as a program manager on the SpecBuilder team and has leveraged his expertise in understanding customer needs to define product vision and scope.

Prior to joining Edifecs, Sachdev worked for companies such as Microsoft and Conway Transportation, where he created, implemented and managed large systems that handled millions of diverse transactions on a daily basis.

Sachdev holds dual bachelor's degrees in Information Technology and Finance from Portland State University, as well as an MBA from the University of Portland. He enjoys reading a wide range of books, particularly science fiction, and is a foreign and independent film buff.



**Robbi McClane**

Senior Director of Product Management

Robbi McClane is responsible for the Unified Operations applications within the Edifecs solution portfolio. In this role, she defines the vision and scope for business process applications and oversees the business requirements, modeling and follow-through during technical design, development and testing.

McClane's healthcare technology experience includes full-scale HIPAA and EDI implementations at more than ten national payers and providing assistance at countless others. Prior to Edifecs, McClane served in product management roles at Vitria Technology and spent several years working on retail banking software at EDS and Ampersand, a startup acquired by EDS. She also spent many years teaching computer science and business administration classes at Pennsylvania-area schools, while working as an independent software and hardware consultant.

McClane earned her bachelor's degree from Penn State in Vocational Education and Computer Science. She enjoys spending time with her family and a wide array of pets. When time permits, she also works on various landscaping projects and interior wall murals.

## Edifecs Team Biographies



**Ryan McDermitt**

Senior Director of Product Management

Ryan McDermitt is responsible for overall product direction for the Edifecs ICD-10 Solution. He has leveraged his experience in consulting while at Deloitte and product/program development for WellPoint to develop and deliver health insurance products that are used by millions of people.

McDermitt's primary career focus has been on health care analytics, data mining and applying aspects of machine learning to healthcare transactions. He spent the last two years developing tools for assessing risk and modeling data for the impending transition to ICD-10.

In addition to his role at Edifecs, McDermitt serves as a senior research analyst at Carnegie Mellon University's Auton Lab, a post-doctoral lab dedicated to machine learning and applied statistics.

McDermitt holds a master's degree in Health Policy and Information Systems Management from Carnegie Mellon University.



**Robert Bunch**

General Manager of the Blues Sector

As General Manager of the Blues Sector at Edifecs, Robert Bunch's responsibilities straddle the product development, marketing and sales functions. He is tasked with expanding Edifecs' presence among all Blue Cross and Blue Shield plans.

Bunch has more than 15 years of experience with healthcare payers, of which the last 10 were spent at WellPoint Health Networks. At WellPoint, he held various leadership positions, including product development, government and regulatory compliance; systems integration; business migration activity and various systems and application programming teams. While in the product organization, Bunch led the launch and ongoing development of WellPoint's Consumer Driven Health product line—WellPoint's fastest-growing product.

Prior to WellPoint, Bunch worked as a consultant in the public sector with specific responsibility for Centers for Medicare and Medicaid Services (CMS) programs. In this role, he had responsibility for the successful delivery of a multi-state Medicare Part A claims system migration, and business process reengineering tasks for multiple State Medicaid agencies.

Bunch earned his bachelor's degree from Columbus University and a Certificate in Business Management from the Kelley School of Business at Indiana University. He also holds a Project Management Professional certification and is Six Sigma Champion-certified. Bunch enjoys spending time with his family, running and playing golf.

## | Edifecs Team Biographies



**Sourabh Sinha**

Director of Product Management

Sourabh Sinha brings more than 15 years of software product development experience to Edifecs, of which the last ten were spent at Microsoft. While at Microsoft, Sinha served in multiple roles, including group program manager for the Online Services Division. In this role, he was responsible for leading development of multiple products related to supply chain optimization and consumption-based billing models.

Prior to that, Sinha worked in Microsoft's Xbox Division as a development manager and was responsible for the supply chain implementation for the initial release of the Xbox console. Before joining Microsoft, he worked as a software consultant in various industries across the United States, Europe and India.

Sinha holds a degree from the Indian Institute of Technology and is currently pursuing an MBA from Foster School of Business at the University of Washington. Outside of work, he enjoys spending time with his family and playing golf.



**Herb Larsen**

Principal of Healthcare Industry Strategy

Herb Larsen is Principal of Healthcare Industry Strategy at Edifecs, with more than 25 years of experience in the healthcare payer and provider markets. He specializes in developing comprehensive solutions for payers and provider organizations to solve their toughest business problems, extend their capabilities and build competitive advantage.

Larsen has worked as a consultant to a wide variety of healthcare organizations. He has helped payer organizations improve their operations, assisted providers with their payer-focused administrative operations, and helped technology and service vendors by leading functions such as sales, alliances, marketing and operations.

Prior to Edifecs, Larsen held executive positions at companies of all sizes, including Arthur Andersen LLP, Quovadx, Inc. (now Lawson), Blue Cross and Blue Shield of Georgia and CIGNA.

Larsen received his bachelor's degree from Harvard University. He is a frequent speaker at healthcare industry conferences on the subjects of interoperability and health data exchange. He has also served on the board of the Managed Care Executive Group.



**John McCandlish**

Principal of Healthcare Solutions

John McCandlish is Principal of Healthcare Solutions at Edifecs, bringing more than 20 years of healthcare IT expertise in architecture, business development and project management roles. His background includes serving as the lead architect for numerous Medicaid Systems and large healthcare payer IT projects.

Prior to joining Edifecs, McCandlish was director of Technology at CSC for its State and Local Solutions Division, where he led development of the technology solutions addressing Medicaid, data warehouse, and HIE/HIT business needs. Prior to CSC, McCandlish worked for Deloitte Consulting in the healthcare payer market and at ACS for State Healthcare.

McCandlish earned his bachelor's degree in Computer Science from Delta State University and his MBA from Millsaps College.

# Attendees

## Blue Cross and Blue Shield of Kansas City

**Ray Panfil**  
Director, Member Centric TSG

**Jim Nichols**  
EDI Manager

## Blue Cross and Blue Shield of Louisiana

**Bob Drelick**  
Vice President, IT Application Services

**Toni Lee**  
Manager, ECI

## Blue Cross Blue Shield of Massachusetts

**Kim Karbott**  
Director, Claims Administration & Support

## Blue Cross and Blue Shield of North Carolina

**Jo Abernathy**  
Vice President, Application Development

**Cindy Troxler**  
Vice President, Claim Operations

**Janet Jackson**  
Director, Document Operations & Electronic Solutions

**Ralph Mazza**  
Director, Application Development & Integration

## BlueCross BlueShield of Tennessee

**Maggie Fox**  
Director, Commercial Systems

**Scott Hightower**  
Director, eHealth

## Blue Cross and Blue Shield of Vermont

**Dan Galdenzi**  
Corporate Director of IT

## Blue Shield of California

**Anurang Revri**  
Vice President

**Alice Raia**  
Director, EDI Applications & Operations

**Lauri Satterthwaite**  
Director of Claims

## Centene Corporation

**Glendon Schuster**  
Senior Vice President & Chief Technology Officer

## Harvard Pilgrim Health Care

**David Querusio**  
Director eBusiness Architecture

## MultiPlan, Inc.

**Keith Bush**  
Senior Vice President & Chief Information Officer

## Premera Blue Cross

**Martin Strand**  
Senior Manager of IT Applications

## Regence

**Robert Yox**  
Director of Infrastructure & Enterprise Platform

**Pat Waller**  
Director

## Tufts Health Plan

**Joseph Imbimbo**  
Vice President

**Patrice Devoe**  
Director of ICD-10 Implementation

## WellCare Health Plans

**Mark Lantzy**  
Chief Information Officer



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