

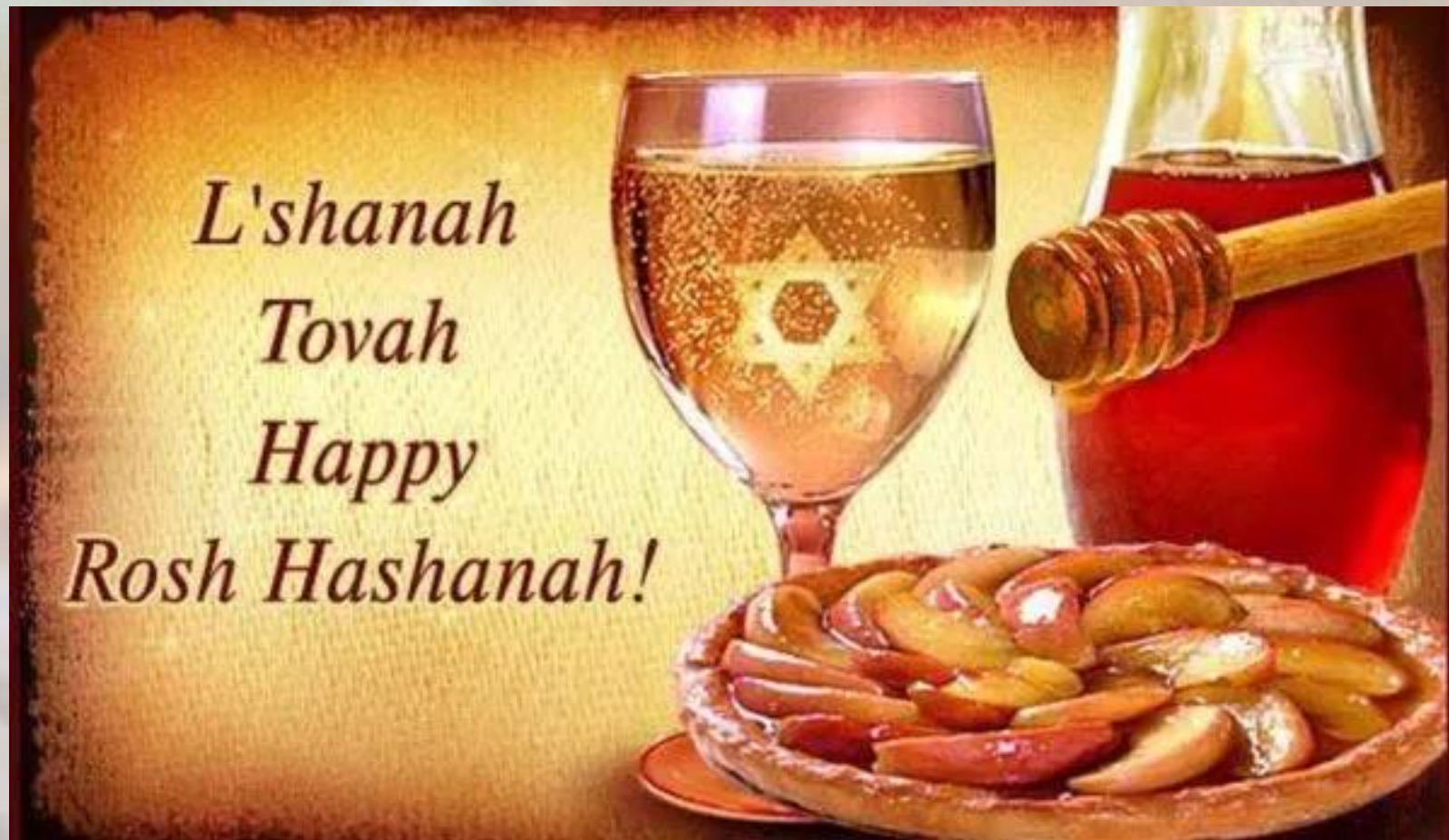
# WELCOME TO THE PMI MONTGOMERY COUNTY CHAPTER'S OCTOBER MONTHLY DINNER & VIRTUAL MEETING





# Happy New Year!

*Our sincerest apologies to all of our Jewish members and guests for not being to move the meeting to an alternate date here at our great location!*





# Chapter News & Notes

**20<sup>TH</sup> ANNIVERSARY**  
**MEMBER**  
**APPRECIATION**  
**SYMPOSIUM.. 4 DAYS**  
**AWAY!**

**2 DAYS... 14 PDUs.**  
**\$0 for Members**  
**(Valid Members Only)**

**\$20 per/day for Non-**  
**Members & Guests**

**Become A  
Member  
for only  
\$20 / yr!!**

**Commemorating 20-year history of excellence**  
**PMI Montgomery County Chapter**  
*is hosting a two-day conference: leveraging AI in project management, advancing sustainable development, innovative renewable energy infrastructure systems and Public-Private Partnership (PPP)*

**SYMPOSIUM**  
AI In Project Management and Sustainable Development

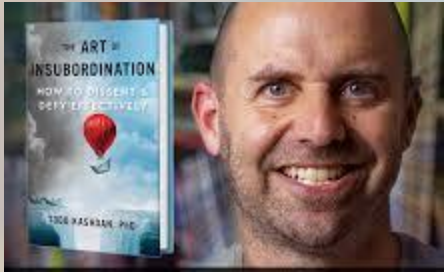
**October 7 & 8, 2024**  
**Civic Building,**  
1 Veterans Place  
Silver Spring, MD 20910

**Project Management Institute, Montgomery County, MD**

Register at: <https://pmimontgomerycountymd.org/>



# Symposium Details



***Featured Day 1 Keynote:***

***Dr. Todd Kashdan (Best Selling Thought Leadership Author, CEO of the Well Being Lab)***

***First 200 Attendees on Monday receive a free hardcover signed copy of 'The Art of Insubordination'***

**Monday: 830am – 4pm  
7.0 PDUs**

**Tuesday: 830am – 4pm \*may end early\*  
7.0 PDUs**

**Finalized agenda being released  
tomorrow (3 Oct)**



Project  
Management  
Institute.  
Montgomery  
County, MD



Todd Kashdan • 1st

Professor, Founder of The Well-Being Laboratory, Best-Selling Author 📖 x 3 in...  
9h • 🌐

For the authors in the room - I hope you can understand my pleasure upon coming home from my daughter's soccer game to find 300 copies of my latest book. Bought with a request for me to sign them all!!!

My brain is ecstatic

My right wrist loathes me.



# BOOKS HAVE ARRIVED!





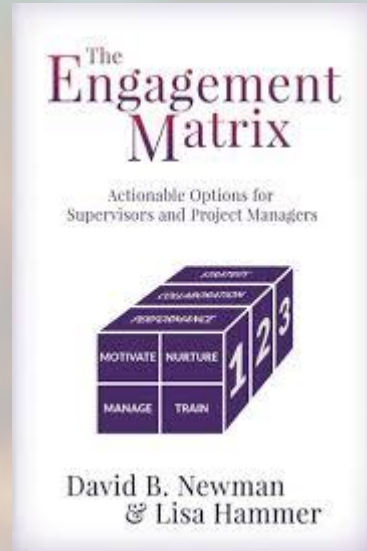
# Speaking of Free!!!

*Featured Presenters:*

*Leadership Techniques  
(Lisa Hammer & David  
Newman)*

**PRESENTING**

*Servant Leadership in the 21<sup>st</sup>  
century Digital Age*



## Our 20<sup>th</sup> Anniversary Member Appreciation Dinner is Wednesday, November 6<sup>th</sup>!

*Free 4-Course Buffet Dinner to  
valid members*





# Virtual Lunch & Learn Notice



**Mr. Jonathan Groff**  
**U.S. Air Force Modernized IT Platform**  
**Executive Sponsor**

***Friday, Oct 18<sup>th</sup>***  
***11:45am – 1:00pm***  
***Free! – 1.2 PDU***

***Project Benchmarking: Reintegrating  
Air Force Warrant Officer Ranks to Enhance  
Force Capability through Strategic Portfolio  
Management (SPM)***



# Finding yourself AI Curious?

**PMI's 2<sup>nd</sup> Free To Members Artificial Intelligence Course (5 PDUs on the table)**



*Build upon your GenAI overview course in how to better incorporate GenAI into our daily efforts*





**Project  
Management  
Institute.**

**Who needs a Job?**

**Who has a Job?**



# Need PDUs??

**Since the start of the Pandemic, 95% of our Chapter Events have been uploaded to our Chapter YouTube Channel**

**Watch/Listen to a meeting you missed and self-report your 1.0 PDU (Claim Code in Video Description)**

The screenshot shows the YouTube channel page for PMI Montgomery County MD. The channel has 86 subscribers and 38 videos. The video grid includes:

- PMI Montgomery County MD - April 2023 Monthly Chapter Event featuring Throughline...** (49 views, 3 weeks ago, 1:19:59)
- PMI Montgomery County MD - March 2023 Chapter Event featuring Ms. Elizabeth Garza...** (38 views, 2 months ago, 54:56)
- PMI Montgomery County MD Chapter February 2023 Monthly Meeting featuring...** (52 views, 3 months ago, 1:21:53)
- PMI Montgomery County MD Chapter December 2022 Monthly Dinner featuring...** (62 views, 4 months ago, 58:15)
- PMI Montgomery County MD Chapter: November Monthly Meeting featuring Ms...** (104 views, 5 months ago, 1:17:24)
- PMI Montgomery County MD Chapter - September 2022 Monthly Meeting feat. Mr...** (32 views, 7 months ago, 1:14:09)
- PMI Montgomery County MD Chapter - June 2022 Monthly Chapter Dinner feat. Ms...** (50 views, 11 months ago, 56:34)
- PMI Montgomery County MD Chapter: June 2020 Monthly Chapter Virtual Meeting feat...** (5 views, 11 months ago, 1:12:47)



# PMI Montgomery County Toastmasters Group



**We meet on the 2nd and 4th Wednesday of the month  
on Zoom,  
and the 3rd Wednesday of the month in person.**

*Potomac Library - In-Person Meetings 3rd Wednesdays 10101 Glenolden  
Drive Potomac, MD*

***Next Meeting: Wednesday, October 9<sup>th</sup> (virtual via Zoom) 7pm – 8:30pm***

***Resume your prior Toastmasters work or start a new Journey!***



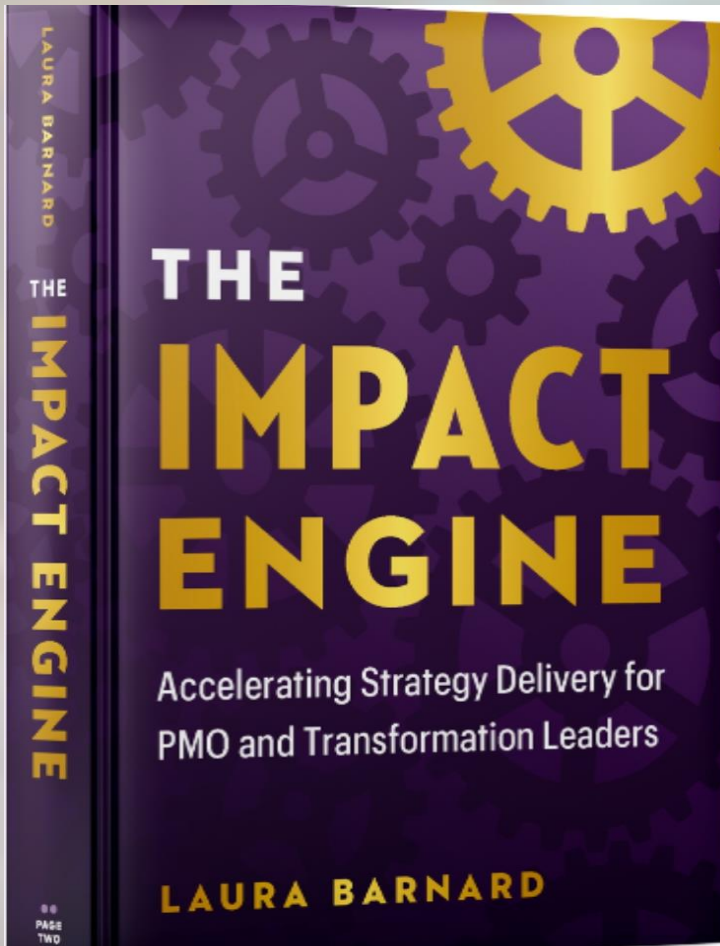
**Project  
Management  
Institute.**

# New Book Alert!

*Industry Leader and former Chapter Board Member Ms. Laura Barnard has recently wrapped up her 1<sup>st</sup> book “The Impact Engine”*

*In Bookstores (Amazon) now for \$29.95*

*\*Let the Raffle Begin!*





# Sister Chapter & PMI Events



PMI  
Baltimore



Project  
Management  
Institute.  
Silver Spring

**Saturday, October 5<sup>th</sup> 2024**

**Winery Social. 11am – 2pm**

*Uncorking Project Excellence: A*

*PMIWDC Winery Social*

*Winery at Bull Run (\$20/35)*

**Wednesday, October 23<sup>rd</sup>**

**Beyond the Task: How to become an  
Emotionally Intelligent Project Manager**

*UMD Outpatient Conf. Center, Baltimore*

*\$40*

**Thursday, Nov 14<sup>th</sup> 9-5**

**Maryland Project Symposium  
(Partnered with Univ. of MD)**

*\$150*

**Tuesday, October 8<sup>th</sup> 2024**

**Monthly Meeting**

**Agile Teams & Business Agility**

*VA Tech EBC, Arlington*

*(\$30/\$40)*

**Wednesday, November 13<sup>th</sup>**

**Project Management: What's Next?**

*Columbia, MD*

*\$30/\$40*

# Our Education Partners are still in business and doing Amazing Things!





# Our Featured Speaker for this evening is Mr. Robert Weiner (AWS-CCP)



- *Senior Solutions Architect, Serco Inc.*
- *Various Leadership Roles across the private sector during 40+ year career*
- *Member of Montgomery Blair High School Alumni Association*
- *Certified Cloud Practitioner – Amazon Web Services*
- *World Renowned Drummer.... Now Retired!*



**Project  
Management  
Institute.  
Montgomery  
County, MD**

*Statements or claims made during this presentation are those of the presenter and do not reflect or represent those of the Project Management Institute (PMI) or the Montgomery County PMI Chapter.*



AFFORDABLE CARE ACT



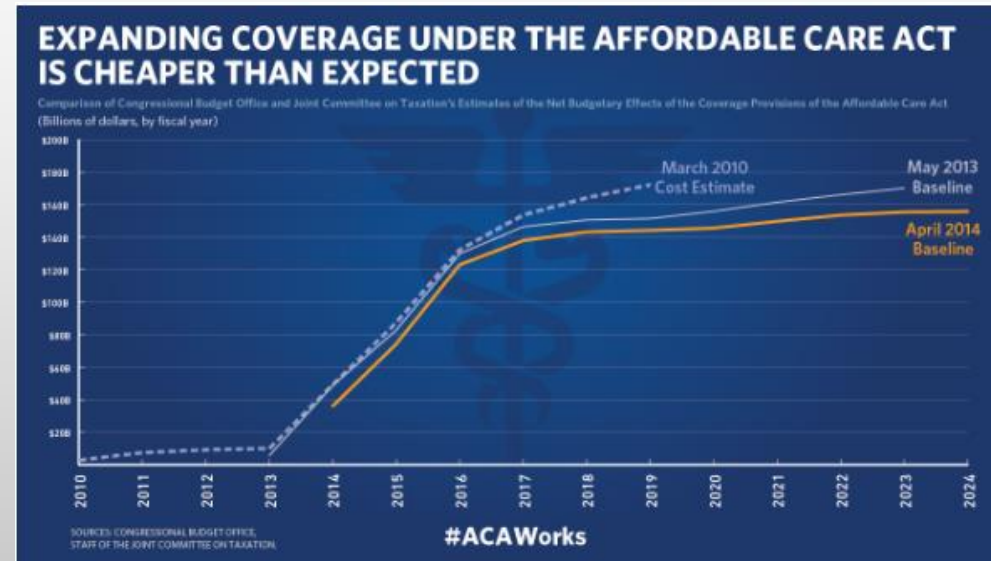
# *AUTOMATING CONSUMER ELIGIBILITY FOR THE AFFORDABLE CARE ACT*

- ROBERT WEINER
- BUSINESS PROCESS SOLUTIONS ARCHITECT
- SERCO, INC.
  
- OCTOBER 2, 2024



# AFFORDABLE CARE ACT STATISTICS

- AS OF FEBRUARY 2024, MORE THAN 45 MILLION PEOPLE WERE ENROLLED
- IN 2023, THE UNINSURED RATE IN THE UNITED STATES DROPPED TO 7.2%, WHICH IS AN ALL-TIME LOW.
- AS OF JUNE 2023, 24.5 MILLION ADULTS WERE ENROLLED IN THE ACA MEDICAID EXPANSION GROUP
- IN 2023, THERE WAS A HIGH MID-YEAR GROWTH IN MARKETPLACE ENROLLMENT, WHICH IS LIKELY DUE TO PEOPLE TRANSITIONING FROM MEDICAID TO MARKETPLACE COVERAGE



# CONSUMER ELIGIBILITY

- CONSUMERS CAN HAVE ELIGIBILITY ISSUES
  - NEED FOR FINANCIAL SUPPORT
  - IDENTIFY VERIFICATION – OUT OF THE COUNTRY CITIZENS
  - INCOME VERIFICATION
  - DATA MATCHING ISSUES – NAME, SS#, ETC.
  - OTHER CONVERGES - MEDICAID
  - MANY OTHER TYPES OF VERIFICATION ISSUES
- ELIGIBILITY MUST BE VERIFIED!
- SERCO PROVIDES ELIGIBILITY VERIFICATION
- HEALTHCARE.GOV STARTS THE PROCESS
- VERIFICATION CASE ELECTRONICALLY PASSED TO SERCO FROM HEALTHCARE.GOV
- SERCO SEND LETTER TO CONSUMER REQUESTING VARIOUS DOCUMENTS
- CONSUMER DOCUMENTS DRIVE THE VERIFICATION

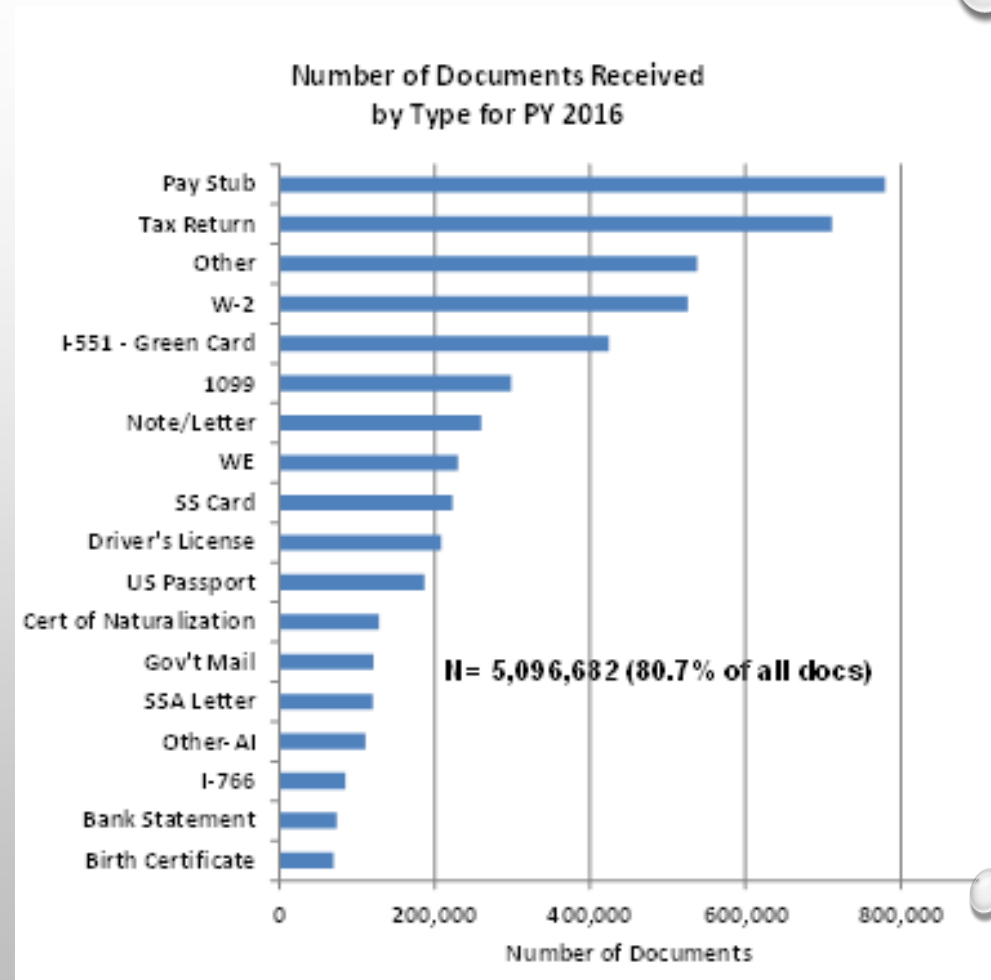


# DMI SUPPORTING DOCUMENTS

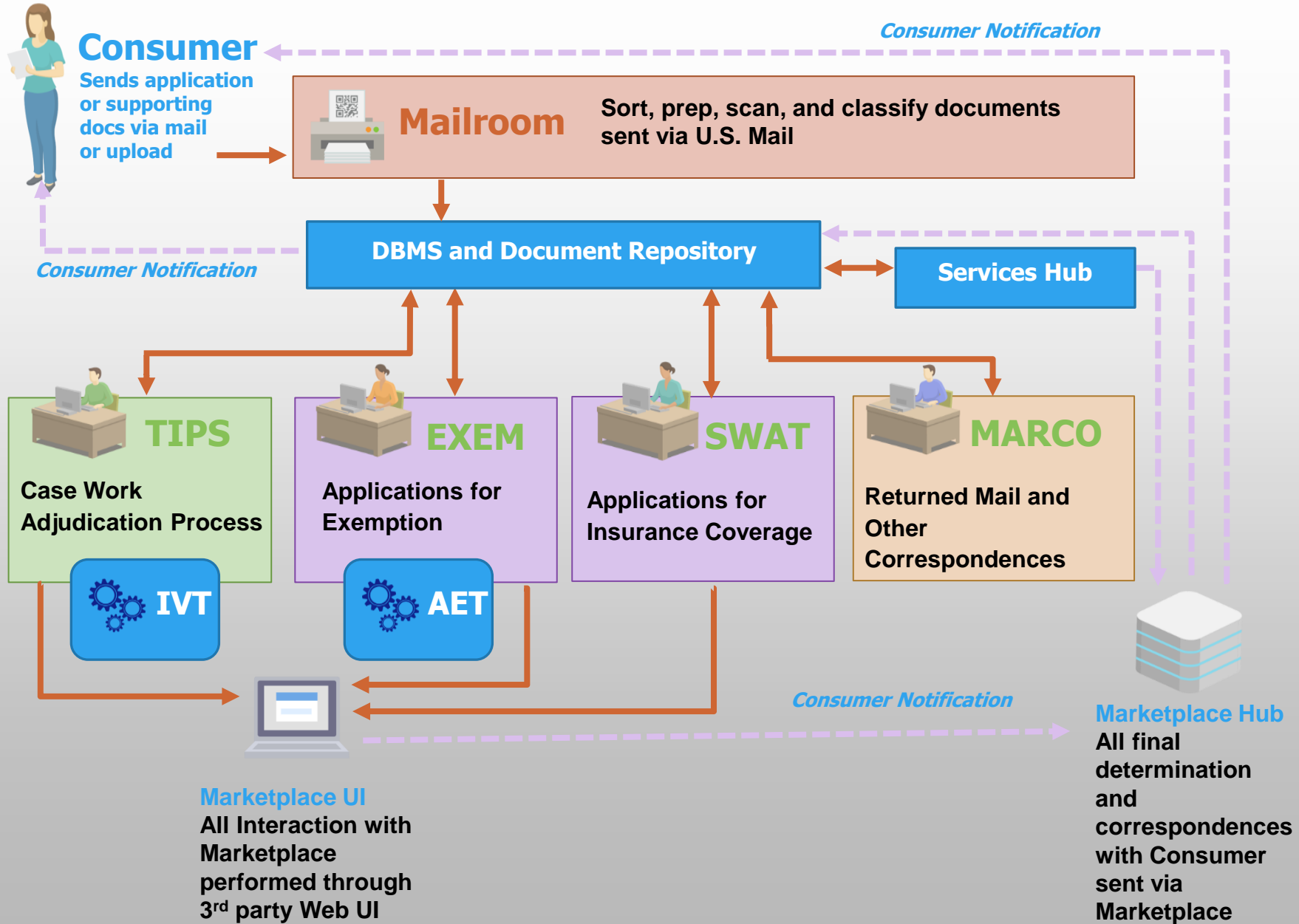
- **SYSTEM WILL BE CONFIGURED TO RECOGNIZE AND EXTRACT DATA FROM 150+ DOCUMENT TYPES AND 100+ METADATA FIELDS:**

- PAY STUBS X 5 (ADP AND OTHER MOST FREQUENT)
- TAX RETURNS X 4 (1040A, 1040EZ, )
- W2S
- 1-551 GREEN CARD
- 1099S X 6 (1099-MISC, -DIV, -INT, -G, -R, -C)
- SS CARD
- DRIVERS LICENSE
- US PASSPORT
- CERTIFICATE OF NATURALIZATION
- SSA LETTER
- I-766
- BANK STATEMENTS
- BIRTH CERTIFICATES

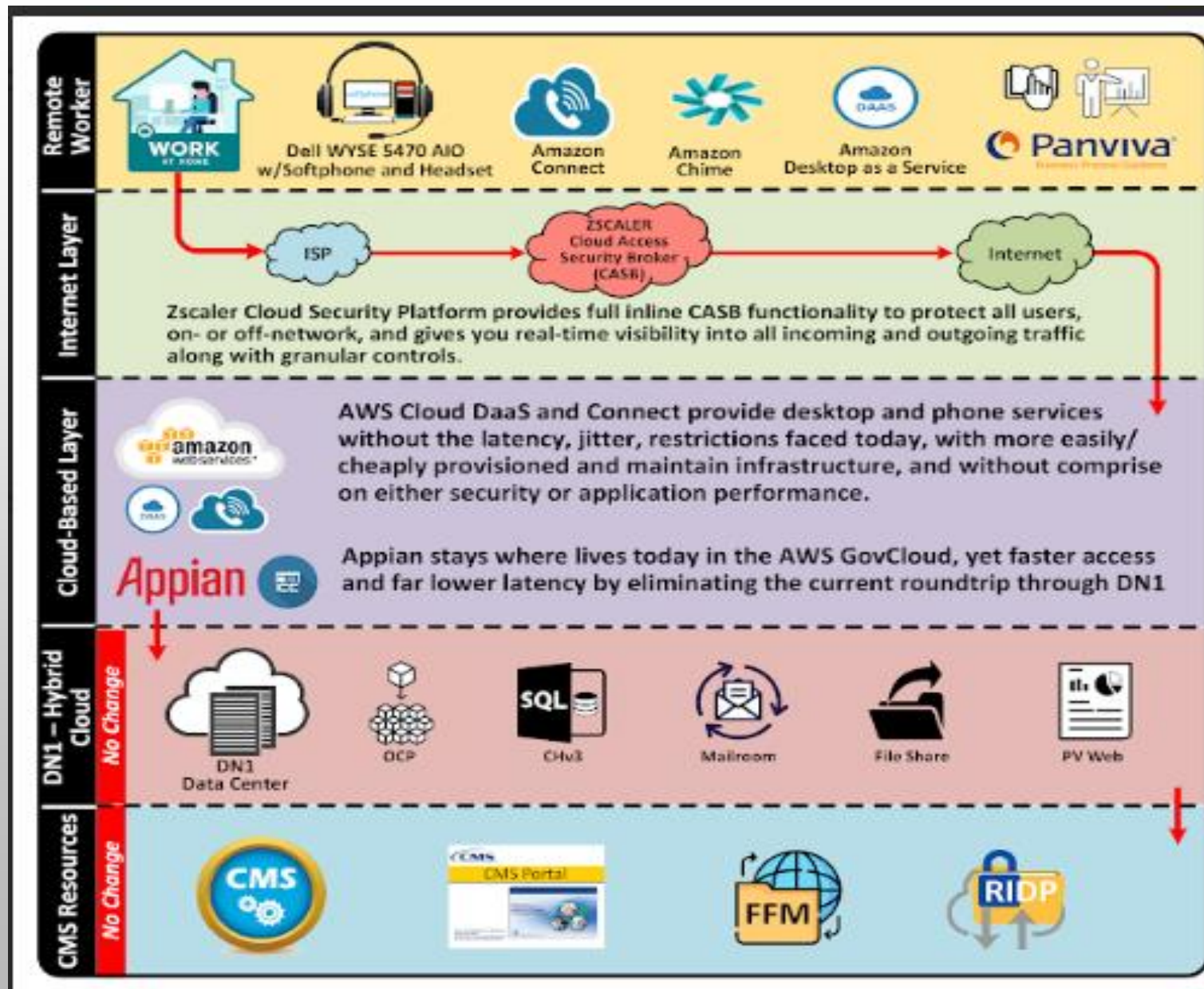
- AI / MACHINE LEARNING WILL BE USED FOR ADAPTIVE RECOGNITION OF DOCUMENT TYPES OUTSIDE OF PREDEFINED CATEGORIES



# SERCO'S CMS ELIGIBILITY SUPPORT PROCESS-AT-A-GLANCE



# SERCO'S CMS ELIGIBILITY SUPPORT PROCESS-AT-A-GLANCE





# AUTOMATION TOOLS

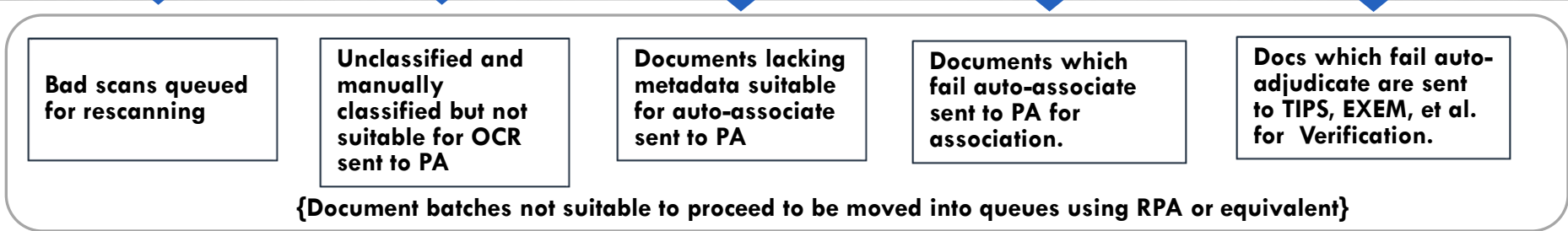
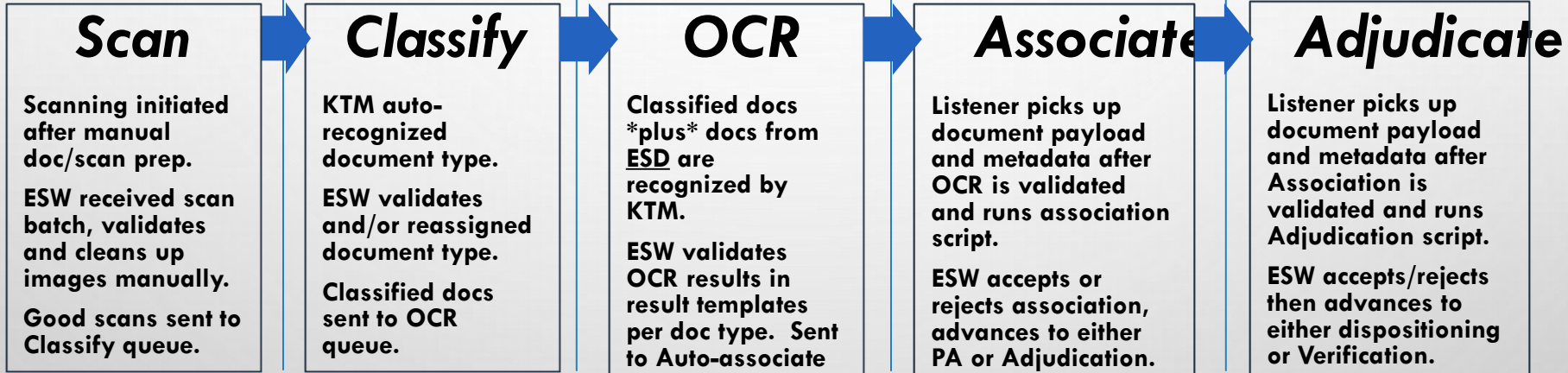
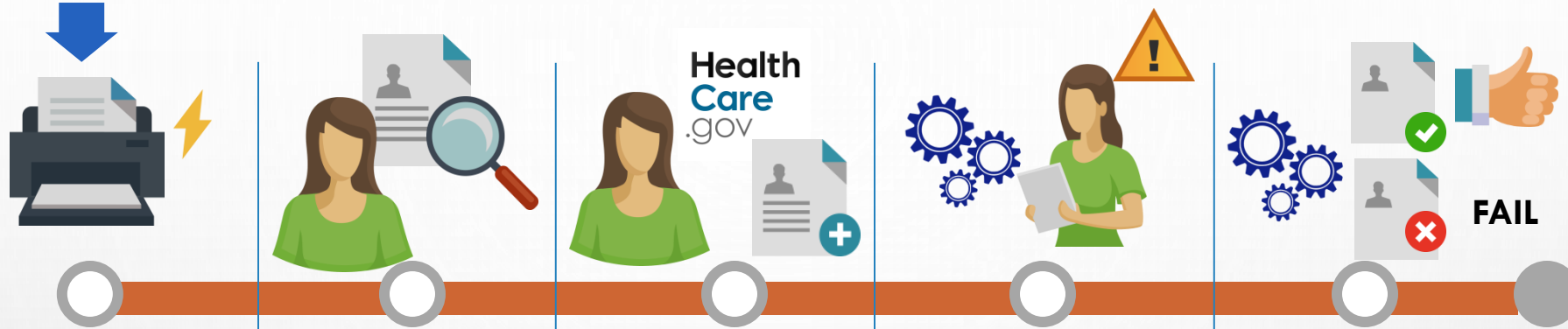
# AUTOMATION TOOLS

- TUNGSTEN DOCUMENT AUTOMATION
- TUNGSTEN ROBOTIC PROCESS AUTOMATION
  - DATA INPUT
  - WORKER TASK RESOLUTION
- APPIAN WORKFLOW
  - CASE MANAGEMENT APPLICATION
- SAPIENS DECISION
  - 1000'S OF DECISIONS IN SECONDS (BUSINESS RULES)
- COMING SOON.....
  - GENERATIVE AI
  - AI BASED ENTITY EXTRACTION



# AUTOMATED DOCUMENT MANAGEMENT

- Application-level data ingested via audit files
- Documents received and scanned in Serco Mailroom





# ROBOTIC PROCESS AUTOMATION

- WHAT IS IT?
- A SOFTWARE TECHNOLOGY THAT AUTOMATES REPETITIVE TASKS BY MIMICKING HUMAN ACTIONS. RPA CAN BE USED TO:
  - PERFORM DATA ENTRY: RPA CAN PERFORM DATA ENTRY, DATA RECONCILIATION, AND DATA MIGRATIONS
  - MANIPULATE SPREADSHEETS: RPA CAN MANIPULATE SPREADSHEETS AND ACCESS DATA FROM MULTIPLE SOURCES
  - INTEGRATE SYSTEMS: RPA CAN INTEGRATE SYSTEMS AND ACCESS DIFFERENT APPLICATIONS
  - GENERATE REPORTS: RPA CAN GENERATE AUTOMATED DATA REPORTS
  - PERFORM ANALYTICS: RPA CAN PERFORM ANALYTICS
  - REACH OUT TO CUSTOMERS: RPA CAN PERFORM CUSTOMER OUTREACH AND COMMUNICATIONS
  - RPA CAN MIMIC USER KEYSTROKES AND MOUSE MOVEMENTS
- How do we use it?
  - Data Input and reformatting
  - Perform the work of an Eligibility Service Worker
    - As an online user
    - As a background batch process



- Dropped seasonal worker count
  - 2000/season in 2018 -> 800 in 2024
  - Huge financial savings!

# APPIAN AUTOMATED WORKFLOW



## What is it?

Workflow automation software automates business processes and tasks



## Benefits

Saves time and money by reducing the need for manual labor

Improves productivity and efficiency

Reduces the risk of human error

Identifies areas for process improvement

Maintains consistency across all activities

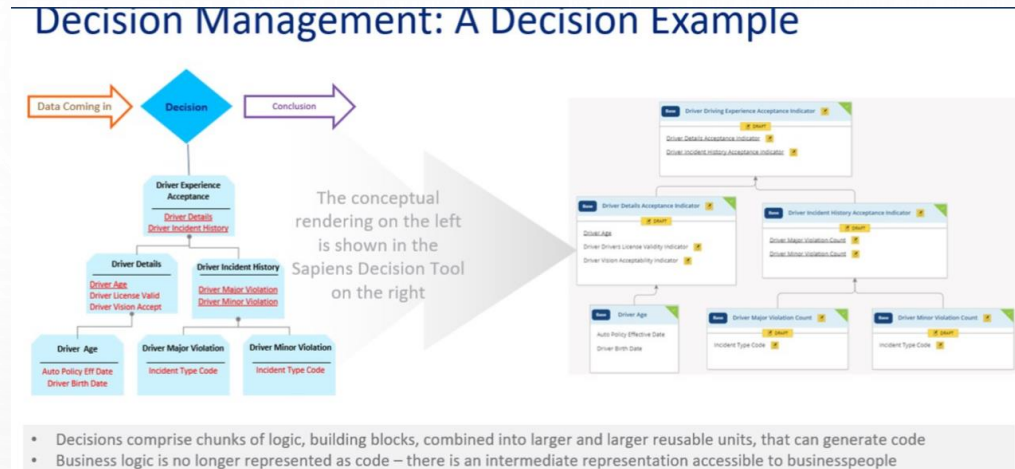


- How do we use it?
  - Work Tasks routed electronically to worker or RPA queues
  - Ensures SLAs are met!
  - Tracks ESW worker performance
  - Timers and event handlers fire when needed
  - Allows operations to manage queues and work
  - Saved many worker labor hours

# SAPIENS DECISION™

- End-to-end business logic management capabilities from legacy code extraction to decision modeling with no code tools, and deployment through decision-as-a-service

- Automates business rules
- Extracts logic from code -> decision model
- API available
- We use DAAS (decision as a service)



- How do we use it?
- As a service
- Task delivery to the right entity via Appian Workflow
  - RPA or queue
  - Skill set of the worker
  - Training certifications of the user
  - Re-routing logic
  - ACA has complex rules

# AI/ML

- Artificial intelligence (AI) and machine learning (ML) are related technologies that are used to create intelligent machines that can mimic human intelligence:
- AI
  - Machines that can mimic human intelligence. AI uses math and logic to simulate human reasoning to learn from new information and make decisions.
- ML
  - A subset of AI software systems that can learn and improve based on the data they consume.
  - ML uses mathematical models of data to help computers learn without direct instruction. ML algorithms process large amounts of historical data to identify patterns and make predictions.
- While every machine learning solution is an AI solution, not all AI solutions are machine learning solutions.
- AI and ML are often used interchangeably, but the distinction between the two can help businesses and organizations better equip their teams with the right tools.



# AI/ML CONT'D

- GENERATIVE AI

- Produces content from data using ML, pattern matching, recognition, and heavy math

- ENTITY EXTRACTION

- Extracting words and phrases and determining the context of how they are being used

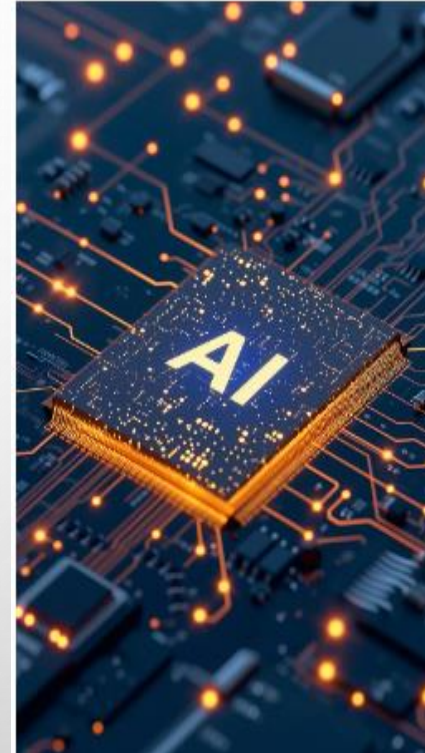
- LARGE LANGUAGE MODELS

- Massive Vocabularies Built By Leading Software Companies
  - A Large Language Model (LLM) Is a Type of Artificial Intelligence (AI) That Uses Deep Learning To Process Natural Language And Perform Various Tasks



Many LLM's....

- Anthropic's Claude
- ChatGPT
- Cohere Command
- Crowdworks
- Databricks
- Google Genesis
- IBM Watson
- Lightning AI
- Meta Llama 2
- MindsDB
- MosaicML
- WhyLabs



# AI/ML – APPLICATION TO ACA ELIGIBILITY

- Generative AI
  - Consumer call transcripts
    - English
    - Foreign languages
  - Assess transcript content versus call QC guidelines
  - Highlight transcript areas out of compliance
  - Calculate consumer sentiment
  - Generate call observations
  - All huge labor savings for our QA process
- Entity Extraction
  - Consumer Written Explanations
  - Explain income and other complex issues
  - Extract words and phrases and determine context and usage to drive further automation

# WRITTEN EXPLANATIONS – INCOME VERIFICATION

“Last year, I made \$24,520 and an additional 35,000 from a part time job. My wife only works half time and makes 10,000 a year.

This year I expect to make 35,200 but my wife will only make 9,200 this year.”

Text	Classification	Value
“Last Year”	Date	2023
“\$24,250”	Income	\$24,250
“35,000”	Income	\$35,000
N/A	Calculation – Income 2023	\$59,250
“This year”	Date	2024 based on the phrase “Last Year”
“35,200”	Income	35,000 - 2024 income
“wife will only make 9,200” this year.”	Income	\$9,200
N/A	Calculation	\$44,400 total income in 2024

# PROJECT MANAGEMENT



# PROJECT ORGANIZATION

- PMO ORGANIZATION
  - VP/DIRECTOR
  - PRODUCT LINE MANAGERS – ONE FOR EACH FUNCTIONAL AREA
  - PROJECT MANAGERS - POOL
  - ANALYSTS – BUSINESS, OPERATIONS, PROCESS, AND FINANCIAL
  - MARKET PLACE – INTERACTS WITH CMS ON ACA POLICY
  - SAFE AGILE PROGRAM MANAGEMENT AND ITERATION PLANNING
- IT ORGANIZATION
  - VP
  - DIRECTOR
  - MULTIPLE TECHNICAL AREAS
    - APPDEV, IT OPERATIONS, NETWORKING, CLOUD, AND DATABASE
  - SOFTWARE QUALITY ASSURANCE
- OPERATIONS
  - TWO FACILITIES
  - ESW'S – MOST WORK FROM HOME
  - OPS MANAGERS

# QUESTIONS/DISCUSSION

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