



SOURAV BHATTACHARYA

EXPERIENCE SUMMARY

- 20 years of expertise and experience in managing customer relations and delivery of business operations. A proven track record of creating a high performing team and excellence in service delivery.
 - Expertise in leading operations in healthcare domain including Commercial Health Plan Operations, Medicaid, Medicare and Blue Cross and Blue Shield association. State Health agencies
 - Successful track record of establishing, delivery and operational excellence in Services including
 - Customer Service – Service Desk, Member Services, Provider Services
 - Enrollment, Eligibility Billing Operations
 - Claims and Encounter Operations
 - Provider Data Management Operations
 - Coding and Billing Operations
 - IT Operations
 - Over the 20+ years of Servicing the US Health Care market I have Set Up, Build Capability, Transitioned and Managed Delivery of a Portfolio Including a team of 800+ Associates Globally – Covering Consulting, Production Support & IT Ops. Service Operations for Health Plan and Providers. Fostering an environment of Excellence, Innovation, Continuous Improvement, Automation and Delivering Business Value Profitably.
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EXPERIENCE HIGHLIGHTS

- Customer Relationship Management
 - P&L Management and Budgeting
 - Healthcare Operations
 - Global Ops: US, India, Mexico, Manila
 - Operational Excellence – six sigma
 - Program Governance
 - Organization & Institution Building
 - Design Thinking
 - Robotic Process Automation
 - Contract & Vendor Management
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PROFESSIONAL EXPERIENCE

JULY 2018- PRESENT

Director of Service Operations, **UST HEALTHPROOF**

Responsible for creating and institutionalizing an operating model to rapidly implement business operations on Health Rule Payor and associated platforms in the eco-system. Create repeatable components to service multiple clients across the spectrum health plans from commercial to government programs across global locations in US and India

Services Operations Covers : Core Platform Operations (Enrollment and Claims), UM and G&A Intake, Mailroom & Scanning, Call Center (Member and Provider Services), Reporting, Platform Configuration and IT Operations Training.

JULY 2015 – AUGUST 2018

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Market Leader, **LEADING TECHNOLOGY CONSULTING COMPANY**

Cognitive Business Operations, North America Healthcare. Responsible for leading a start-up practice and drive revenue growth and margin. Portfolios consist of existing and New Logo prospects in North America Geography covering payers, providers and intermediaries. **FY '18 target includes 15M TCV booked and 3M revenue.**

Responsible for leading sales effort including **Analyst engagement, Prospecting, Deal Qualification, Mobilize Solution Team for RFX Process, Sales Strategy Development and Customer Engagement, Sales negotiation** and Deal closure

Created a practice pipeline from grounds up from 0-300+M TCV active pipeline in 18 months. Grew Revenue by 180% during the same 18 months. Some, key deals closed include

1. **Cambia Small Group Enrollment - Digital Quote to Card** for BCBS of OR, ID and WA
2. **BCBS NJ Provider Data Management Transformation** - Directory Management
3. **Humana Small Group Billing Transformation** – Customer Experience
4. **Cigna Group Underwriting ad F&A Consulting** – Blue Print for Digital UW, RPA
5. **Walgreens Specialty Pharmacy Call Center** - BPO Outsourcing

2006-2015

TOP BUSINESS CONSULTING COMPANY

Over the almost 10 years working at Cognizant, I had multiple roles leading to a well-rounded experience in running P&L level responsibilities culminating in managing a Portfolio of BPS relationships – Healthcare Payer and Provider with total book value of 100+M TCV Portfolio included existing clients and New Logo Clients. Profiles included accounts like **Ingenix, Anthem Blue Cross Blue Shield, Molina Healthcare, Cigna, Assurant Health, Zimmer-Biomet, Med-Data, Breg, LabCorp, Walgreens**

Delivered a portfolio revenue CAGR of **over 50% over 5 yrs. at over 42% gross margin**

In 2010-2011 recognized for '**Outstanding Contribution**' to Healthcare Vertical at Cognizant.

Global Services Company: Six-Sigma Black-Belt (2005-2006)

Responsible for training Corporate Function Leaders in Green Belt Programs

Delivered 160 Hrs. of GB program in 3 months with 4.7 Facilitator Ratings

Capital Services Company 2001-2005

Associate with Insurance Vertical: Reinsurance US and UK Non-Life, Marine and P&C

Career Rewards & Recognition

“Professional Excellence Award” at GE ERC in 2002 | **“Outstanding Contribution to Healthcare Vertical”** at Cognizant in 2013

Education & Professional Qualification:

Diploma in Engineering – Instrument Technology, CSIO, India – 2000

Certified, Six Sigma Black Belt – 2006 | Certified, Six Sigma Green Belt – 2004



JAIME VALVERDE

EXPERIENCE SUMMARY

- Experienced Technician with a demonstrated history of working in the healthcare industry. Skilled in Retina disease, Nonprofit Organizations, Analytical Skills, Microsoft Word, Coaching, and Government. Strong professional graduated from Wichita High School West. Founder of Clínica Valverde a free health care clinic open for one week out of the year providing free quality healthcare.
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EXPERIENCE HIGHLIGHTS

SEPTEMBER 2021 – PRESENT

TEAM LEAD / **XPANXION**

UNDERSTAND THE PROJECT LIFECYCLE AND ROLES

- KNOW HOW TO DELIVER A PROJECT INCLUDING: MANAGING RESOURCES, IDENTIFYING RISKS AND ISSUES, USING RELEVANT PROJECT MANAGEMENT TOOLS.
- APPROVE/DENY TIMECARDS.
- BUILD A HIGH-PERFORMING TEAM BY SUPPORTING AND DEVELOPING INDIVIDUALS AND MOTIVATING THEM TO ACHIEVE.

JUNE 2021 – SEPTEMBER 2021

QUALITY ASSOCIATE / **UST GLOBAL**

- Perform call monitoring and provide feedback to both agents and management Use quality data systems to compile and track performance
- Provide feedback to call center leaders and managers
- Audit applications making sure information is accurate and with no errors.
- Assist team leads with other duties
- Manage meeting for coaching with team members
- Keep up to date on updated information for Medicaid programs.

JULY 2020 – JUNE 2021

ECONOMIC ASSISTANCE/NEBRASKA MEDICAID CSR, **UST GLOBAL**

- Inbound call center answering questions about Nebraska benefits including snap, ADC childcare and Medicaid.
- Completing application for benefits.
- Respond to questions about benefits.
- Consistently improve customer satisfaction through expert resolution of conflicts, issues, and concerns.
- Keep up to date on updated information for Medicaid programs.

AUGUST 2018 – OCTOBER 2019

MEDICAL TECHNICIAN, **RETINA ASSOCIATES P.A.**

- Preparation of patients for exam including obtaining medical history.
- Accurate recording of medications and specific ophthalmic work up.
- Assist physician during exam as needed.
- Scribing and assisting with procedures.

MAY 2017 – JULY 2018

MEDICAID CSR, **DST MASTER COMPLEXITY**

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- Answer customer telephone calls regarding Medicaid health Insurance coverage.
- Make the requested policy and account changes.
- Respond to questions and concerns about service and escalate calls appropriately.
- Consult with customers to evaluate needs and determine the best options.
- Counsel customers on options for service and coverage.
- Consult both medical facilities and Medicaid members.
- Consistently improve customer satisfaction through expert resolution of conflicts, issues, and concerns.
- Keep up to date on updated information for Medicaid programs.

MAY 2016- MAY 2017

SOCIAL MEDIA/EXECUTIVE ESCALATIONS, **H&R BLOCK**

- Promptly responded to general inquiries from clients via telephone, mail, e-mail, and fax and social media.
- Resolved service issues and shared benefits of additional services.
- Maintained up-to-date knowledge of IRS policies, government changes, and company new services.
- Developed highly empathetic client relationships and earned a reputation for delivering exceptional customer service.
- Cross-trained and provided back-up for other customer service representatives when
- Kept up with complaints so the company could maintain in good standards with BBB

JANUARY 2014 – MAY 2016

TAX IDENTITY SHIELD AGENT/FRAUD SPECIALIST, **H&R BLOCK**

- Evaluate each case that had been filed as a identity fraud case
- Fill out IRS paperwork for member to file a tax identity fraud
- Keep up to date on new IRS rules
- Developed highly empathetic client relationships and earned a reputation for delivering exceptional customer service.

APRIL 2007 – MARCH 2016

BOH/FOH RESTAURANT, **ANAHUAC TORTILLERIA RESTAURANT (FAMILY BUSINESS)**

- Family restaurant owned by my family.
 - Processed cash withdrawals and deposits
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- Adhered to safe working environment following food regulations.
 - Balanced daily cash deposits with a zero-error rate.
 - Manage more than 30 staff and maintain a smooth-running shift.
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EDUCATION

- **MAY 2016**
BACHELORS IN PSICOLOGY
UNIVERSITY OF KANSAS



Laura Montero

EXPERIENCE SUMMARY

- I am a detail oriented, dependable, and ambitious individual with extensive office experience and native linguistic skills. My goal is to obtain a position where I can apply my 7-year experience and greater challenges to grow within a company.
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SKILL SUMMARY

- Microsoft office experience
 - Insurance billing platforms-Kareo, Change healthcare, Texas Medicaid Healthcare Partnership, Optum health, Molina Healthcare, Beacon
 - EHR- Practice Fusion
 - Basic knowledge of using 3D modeling and Texturing using Blender
 - PureCloud experience
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EXPERIENCE HIGHLIGHTS

Xpanxion, LLC, Work from Home

02/2022-Present

Quality Assurance

- Verify accuracy of applications submitted
- Auditing phone calls
- Constructive coaching for performance improvement
- Help agents with any questions during the application process
- Consistent use of Kronos

Transitional Life Counseling, Texas City, TX

07/2016 – 12/2021

Office Manager

- Thorough Insurance Verifications
- Accurate insurance billing
- Patiently handled client complaints
- Collaboratively supervised behavioral technicians
- Timely creation of invoices, contracts, and important office documents
- Executed release of medical records with appropriate patient consent
- Performed translations in Therapy sessions for therapists

Everhealth, Houston, TX

11/2014 – 06/2016

Medical Assistant

- Accurately obtained patient vital signs
- Spanish Translations for Psychiatrist
- Accurately processed medical billing
- Timely processing of Prior authorizations
- Entered and updated patient information in EHR system
- Attained insurance verifications

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- Systemically scheduled appointments

Law Office of Manuel Solis, Houston, TX

08/2014 – 05/2015

Legal Assistant

- Accurate data entry of client information for applications to USCIS for legal status
- Thoroughly revised all outgoing applications for errors and missing documents
- Contacted client to provide missing information or vital documents
- Developed daily and weekly reports on processed applications

EDUCATION

- 03/2020-present
Post University, Waterbury, CT
Bachelor of Arts in Psychology
Cumulative GPA of 3.85
- 05/2001-04/2002
Texas School of Business, Friendswood, TX
Medical Assistant Diploma
Cumulative GPA of 4.0



Maria Elena Forster

SKILL SUMMARY

- OUTLOOK WORD
- Data Entry
- Administrative Support
- Microsoft Word
- Customer Service
- Spanish
- Clerical Experience
- Computer Skills
- Typing 35wpm

EXPERIENCE HIGHLIGHTS

XPANXION/QA

2022-Present/Remote

- AUDIT AGENTS CALL
- Give feedback regarding Quality
- Training new agents English and Spanish
- Maintain record through Excel of designated Agents
- Assist Agents in daily inquires

UST GLOBAL -XPANXION/BILINGUAL CALL CENTER

07/2020-2022 Remote

- Answer Spanish and English calls while using provided by team leads to assist customer filling up Economic Assistance and Medicaid Applications
- Responsible for taking indound calls from the queue and directing them to the correct resource to answer their questions
- Make sure all demographic information is correctly entered in the application, repeating all information back to customer.
- BILINGUAL CUSTOMER SERVICE/ FRONTIER WASTE SOLUTIONS
- 10/2018 to 03/2020 Hillsboro TX
- Entered customer interaction details in TrashFlow to track requests, document problems and record solutions offered.
- Answered customer telephone calls promptly to avoid on-hold wait times.
- Offered advice and assistance to customers, paying attention to special needs or wants.
- Managed customer accounts
- Responded to inquiries and issues regarding disposal pick up.

ADMINISTRATIVE ASSISTANT/AUMAN FUNERAL HOMES READING, PA

07/2015 to 03/2018

- Provided administrative support to funeral home staff.
- Performed administrative duties by obtaining burial permits and doctors' signatures on death certificates and registering a death.
- Devoted special emphasis to punctuality and worked to maintain an outstanding attendance record, consistently arriving to work ready to start immediately.
- Supported the funeral director with all facets of funeral service coordination.
- Used MEM and PUBLISHER to create and print tribute cards, guest books, and prayer cards.

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S T

EDUCATION

- **2009**
ASA COLLEGE
Medical Assistant
New York, NY
- **1988**
COLEGIO DIVINA PASTORA
Dominican Republic
Art & Literature



Nathan Philippi

EXPERIENCE SUMMARY

- Software professional with over 18 years of experience. Career experience in Technical Account Management, Project Delivery management, QA Leadership, and Change/Release management with a demonstrated history of working in the information technology and services industry. Skilled in Team Management, Project Management, IT Administration, and Call Center services. Duties included Test Planning, Test Execution, Project Metrics, and direct leadership of large Software Development teams. Experience implementing projects from business requirements and developing test cases/test plans for Xpanxion clients such as EarthLink, Cardlytics, and Intercontinental Hotels Group, Sony, MagMutual, Elavon, Nebraska Department of Health and Human Services.

EXPERIENCE HIGHLIGHTS

1/19 - Present Xpanxion, LLC - Kearney, NE

Technical Account Manager

- Oversee and consult on accounts for Xpanxion's premier clients ensuring delivery of positive experience and delivery support.
- Manage solutions and recommend service delivery plans for alignment with client business needs and expectations.
- Manage client relationship and develop true partnership for client needs
- Develop and foster career path for Xpanxion employees

Delivery Management

- Track project status for any growth, milestones, breakthroughs, blockers, or issues
- Provide resources for any project needs, like resourcing, transitions, onboarding and more
- Report delivery status items to senior management on a weekly basis

12/16 – 12/19 Xpanxion, LLC - Kearney, NE

Change/Release Management - Sony

- Leading a cross-sourced team in Change Management activities and processes on a daily basis
- Developing and enhancing processes and procedures using ITIL best practices for Change Management
- Analysis and reporting on change trends and volume
- Maintenance and war room coordination of engineering resources
- Development of tool requirements for change ticketing process through several migrations

10/12 – 11/16 Xpanxion, LLC - Kearney, NE

Director – Mobile Applications

- Identify and lead practice- and organization-level initiatives as Rural based Director
- Identify and maintain Mobile device lab for rural based resources
- Facilitate and engage on Mobile engagements

10/10 – 10/12 Xpanxion, LLC - Kearney, NE

Quality Assurance Manager

- Identify and lead practice- and organization-level initiatives as chair of the 8-member Nebraska-based management team, consulting with CEO and VP-level management for strategic direction
- Support evolutionary process improvement and training programs for 70+ member organization
- Serve as organizational manager for 7 direct reports, conduct performance appraisals

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- Assess internal QA practices and adherence to established QA processes among project teams

2/12 – Present Xpanxion, LLC - Kearney, NE

Quality Assurance Project Lead - Cardlytics

- Serve as Project lead for 8 person QA team supporting industry leading transactional marketing firm.
- Plan test coverage, manage deliverables, schedule and estimation for as many as 3 simultaneous releases
- Engage in project planning and test execution in an agile development environment
- Responsible for performing functional, integration, end-to-end, and regression testing activities, including defect tracking, triage and resolution

10/10 – 2/12

Quality Assurance Project Lead – Earthlink, Inc.

- Serve as Project Lead for 10+ person QA team supporting over \$1m in annual revenue
- Plan test coverage, manage deliverables, schedule and estimation for as many as 3 simultaneous releases (1800+ person-hours, 5-10 releases per year)
- Types of systems/applications tested include: web-based order entry, CRM, call center/support tools, order provisioning & fulfillment, invoicing, financial reporting, payment processing, XML-based web service middleware, web-based email.
- Responsible for performing functional, integration, end-to-end, and regression testing activities, including defect tracking, triage and resolution
- Plan test coverage and execute tests on a variety of Unix and Windows-based systems
- Collaborated with developers, designers and testers in USA and India offices. Travelled to Atlanta and Pasadena locations to acquire domain knowledge.
- Sample Test Plan artifact available upon request.

5/10 – 10/10

Quality Assurance Lead – InterContinental Hotels Group

- QA Lead for three offshore test team resources
- Enterprise application system including UI, Database, and Mainframe testing
- Test Case management and reporting using Quality Center 10

5/09 – 5/10

Quality Assurance Lead – Market Velocity Inc.

- QA Analyst for MVI Client domain websites
- Maintenance/Enhancement testing for electronics trade-in application
- Automation testing using Selenium IDE/RC

2/10 – 5/10

Quality Assurance Analyst – IPG

- Setup QA Team for new customer portal application
- Test case design using functional requirements for new application using SharePoint 2010 framework

11/09 – 2/10

Quality Assurance Analyst - eCredable

- Test execution of alternative credit scoring web-startup
- Test case design and execution utilizing Excel

U ■ S T

- Third party vendor integration testing – flat file import/export

1/09 – 5/09

Quality Assurance Analyst - InterContinental Hotels Group

- Execution of QA test plans through development life cycle including: regression, verification, and integration testing.
- Test case writing in HP Quality Center 9.2
- Test case execution in HP Quality Center 9.2

9/05 – 1/09

Information Technology, Inc – Lincoln, NE

Project Specialist

- Testing customized software modules to integrate with existing software.
- Screening/testing software to make sure the software meets business requirements.
- Assist with project planning.
- Compliance testing to ensure adherence to financial regulations.
- Implementing and maintaining software packages via remote management using Bomgar, Webex.
- PC/Helpdesk support via remote management to clients.

EDUCATION

- Bachelors of Science from the University of Nebraska



Tammy Redden

EXPERIENCE SUMMARY

- I am loyal employee, dedicated to training all the employees to the best of my ability to be able to perform the functions of the job to the best of their abilities. By facilitating instruction that everyone can learn from and have at their disposal at all times during their job performance. No matter what part of this project is being worked on.
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EXPERIENCE HIGHLIGHTS

DHHS Call Center- Trainer

10/2021 to Present

Xpanxion / DHHS Call Center agent

Kearney NE

- Helps support people in times of need when applying for financial assistance throughout the state of Nebraska.
- I have taken applications, shown empathy and compassion with each and every call.
- I give 110% to every call and make sure my applications are done timely and accurately I have taken the lead on projects, done QA, performed several trainings with individuals as well as groups.
- I help in chat and answer questions through email, phone calls as well as on team video. I have recently (October 2022) became the trainer for new hires and anyone that is needing help with applications.
- I just finished with a class of 16 people who are now on que and doing really well. Will start my new class of 15 in December 2022.

Call center agent

01/2020 to 10/2020

Xpanxion / Cotiviti

Kearney NE

- Called medical offices for medical records on behalf of BCBS and Aetna



Temple D. Juelfs

EXPERIENCE SUMMARY

- Dedicated customer service professional with 3 years experience in a fast-paced environment seeking an opportunity in a team-orientated company. Adept at handling a wide range of contact methods while accurately documenting customer issues and providing first class service with every interaction.
- Track record of quickly acquiring competency in all products and transactions while readily and positively adapting to change.

SKILL SUMMARY

- Strong customer service skills
- Speak clearly and fluently
- Shows compassion and empathy
- Multitasker
- Always will to take on a new challenge and try something new

EXPERIENCE HIGHLIGHTS

May 2020 - Current

Custom Service Representative, UST GLOBAL/DHHS NEBRASKA

- Help support people in times of crisis when applying for financial assistance through the State of Nebraska. I show empathy and compassion to each and every caller. I let them spill their problems to me if needed and try to bring a smile to their face by the end of the call. Quality on the applications is a must, not the quantity of applications completed in a day.

February 2018 – May 2020

Auction Support Specialist, SANDHILLS GLOBAL

- Help customers get their bidding rights, be reviewing their submitted applications and direct them to the proper place on the website that they need to be at.

EDUCATION

May 1996

- Diploma, LEYTON HIGH SCHOOL



Target Profile for Call Center Agents

EXPERIENCE SUMMARY

- Over 10+ years of customer service experience. No scheduling conflicts. others and keeping accurate documentation.
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EXPERIENCE HIGHLIGHTS

Dec 2008 - Oct 2019

Target - Receiving Clerk / Many Positions

- Inventoried and managed all shipments, keeping accurate records of each entering store and leaving store.
- Assisted customers daily in-between duties.
- Managed multiple filing systems and records, including hazardous waste reports, product displays, and communication histories.

Oct 2019 - May 2020

Concentrix - Medical Records Agent

- Helped customers understand the intricacies of complicated health insurance policies.
- Updated customer profiles and kept detailed histories of conversations and changes.
- Followed up with third-party offices and programs as needed on behalf of customers.

May 2021 - Sep 2021

MCI - Personal Phone Banker

- Walked customers through filing loan applications.
- Handled high call volumes on a daily basis, helping resolve technical issues, payment discrepancies, and general questions.

Sep 2021 - Current

RFGI - Debt Collections Agent

- Worked through a high volume of calls, offering payment options and arrangements for customers.
- Researched customer's backgrounds to add information about them to a central database when difficult to track down.
- Kept up to date on constantly shifting regulation in order to accurately

EDUCATION

H. V. Jenkins High School