

Attachment B.11.m
The Myers Group

Myers Group

1. Indicate your organization's legal name, trade name, dba, acronym, and any other name under which you do business; the physical address, mailing address, and telephone number of your headquarters office. Provide the legal name for your organization's ultimate parent (e.g. publicly traded corporation).

Legal Name: Patient Satisfaction Plus, LLC

D/B/A: The Myers Group

Acronym/Other Name: TMG

Physical Address:

**1965 Evergreen Boulevard
Suite 100
Duluth, Georgia 30096**

Mailing Address:

**P.O. Box 526
Duluth, Georgia 30096**

Telephone Number: 770-978-3173

2. Describe your organization's form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and detail the names, mailing address, and telephone numbers of its officers and directors and any partners (if applicable).

The Myers Group operates as a limited liability organization. Listed below are the Executive Officers and Board of Directors Members of The Myers Group. Each individual plays a key role in the leadership and strategic direction for Corporate Development, Client Account Services, Operations, and Finance. All officers are located in our headquarters office in Duluth, Georgia.

Name	Title	Telephone Numbers
AC Myers, III	Chief Executive Officer	770-978-3173 ext. 1302
Debbie Vereb	Chief Operating Officer	770-978-3173 ext. 1308
Bob Moore	Vice President, Sales and Marketing	770-978-3173 ext. 1307
Michael Mitchell	Executive Director of Operations	770-978-3173 ext. 1309
Midge Coker	Director, Client Services	770-978-3173 ext. 1354

Name	Title	Telephone Numbers
David Bahlinger	Director, Research and Analytics	770-978-3173 ext. 1367
Janice Karkula	Director, Production Services	770-978-3173 ext. 1403

3. Provide the name and address of any health professional that has at least a five percent (5%) financial interest in your organization, and the type of financial interest.

Not Applicable

4. Provide your federal taxpayer identification number and Louisiana taxpayer identification number.

Federal Tax ID – 58-2234921. The Myers Group is incorporated in the State of Georgia and currently does not hold a Louisiana taxpayer identification number.

5. Provide the name of the state in which you are incorporated and the state in which you are commercially domiciled. If out-of-state, provide the name and address of the local representative; if none, so state.

The Myers Group is incorporated in the State of Georgia.

6. If you have been engaged by DHH within the past twenty-four (24) months, indicate the contract number and/or any other information available to identify the engagement; if not, so state.

Not Applicable

7. Provide a statement of whether there have been any mergers, acquisitions, or sales of your organization within the last ten years, and if so, an explanation providing relevant details. If any change of ownership is anticipated during the 12 months following the Proposal Due Date of 6/24/2011, describe the circumstances of such change and indicate when the change is likely to occur. Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group has not been involved in any mergers and acquisitions within the last ten (10) years.

8. Provide a statement of whether you or any of your employees, agents, independent contractors, or subcontractors have ever been convicted of, pled guilty to, or pled nolo contendere to any felony and/or any Medicaid or health care related offense or have ever been debarred or suspended by any federal or state governmental body. Include an explanation providing relevant details and the corrective action plan implemented to prevent such future offenses. Include your organization's parent organization, affiliates, and subsidiaries.

No employee of The Myers Group has been convicted of, pled guilty to, or pled nolo contendere to any felony and/or Medicaid or health care related offense. No employee has ever been debarred or suspended by any federal or state governmental body.

9. Provide a statement of whether there is any pending or recent (within the past five years) litigation against your organization. This shall include but not be limited to litigation involving failure to provide timely, adequate or quality physical or behavioral health services. You do not need to report workers' compensation cases. If there is pending or recent litigation against you, describe the damages being sought or awarded and the extent to which adverse judgment is/would be covered by insurance or reserves set aside for this purpose. Include a name and contact number of legal counsel to discuss pending litigation or recent litigation. Also include any SEC filings discussing any pending or recent litigation. Include your organization's parent organization, affiliates, and subsidiaries.

There is no litigation pending against The Myers Group.

10. Provide a statement of whether, in the last ten years, you or a predecessor company has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors. If so, provide an explanation providing relevant details including the date in which the company emerged from bankruptcy or expects to emerge. If still in bankruptcy, provide a summary of the court-approved reorganization plan. Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group has never filed for bankruptcy or insolvencies, nor has the company undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors.

11. If your organization is a publicly-traded (stock-exchange-listed) corporation, submit the most recent United States Securities and Exchange Commission (SEC) Form 10K Annual Report, and the most-recent 10-Q Quarterly report.

The Myers Group is not a publicly traded corporation.

12. Provide a statement whether there have been any Securities Exchange Commission (SEC) investigations, civil or criminal, involving your organization in the last ten (10) years. If there have been any such investigations, provide an explanation with relevant details and outcome. If the outcome is against the organization, provide the corrective action plan implemented to prevent such future offenses. Also provide a statement of whether there are any current or pending Securities Exchange Commission investigations, civil or criminal, involving the Organization, and, if such investigations are pending or in progress, provide an explanation providing relevant details and provide an opinion of counsel as to whether the pending investigation(s) will impair the Organization's performance in a contract/Agreement under this RFP. Include your organization's parent organization, affiliates, and subsidiaries.

Not applicable. Please see above statement.

13. If another corporation or entity either substantially or wholly owns your organization, submit the most recent detailed financial reports for the parent organization. If there are one (1) or more intermediate owners between your organization and the ultimate owner, this additional requirement is applicable only to the ultimate owner.
- a. Include a statement signed by the authorized representative of the parent organization that the parent organization will unconditionally guarantee performance by the proposing organization of each and every obligation, warranty, covenant, term and condition of the Contract.

The Myers Group is not substantially or wholly owned by any other organization.

14. Attach a personnel roster and resumes of key people who shall be assigned to perform duties or services under the Contract, highlighting the key people who shall be assigned to accomplish the work required by this RFP and illustrate the lines of authority.

- a. Submit current resumes of key personnel documenting their educational and career history up to the current time. Include information on how long the personnel have been in these positions and whether the position included Medicaid managed care experience.
- b. If any of your personnel named is a current or former Louisiana state employee, indicate the Agency where employed, position, title, termination date, and last four digits of the Social Security Number.
- c. For key positions/employees which are not full time provide justification as to why the position is not full time. Include a description of their other duties and the amount of time allocated to each.

Listed below are the key personnel specializing in the survey administration and analytics for healthcare survey research projects. This team is made up of highly dedicated and knowledgeable professionals who work with each client to provide guidance and technical support throughout the process. All members of the project team are hold a full-time employment status and have several years experience and extensive knowledge in conducting surveys for Medicaid managed care organizations. The Myers Group currently does not employ any individuals that are named a current or former Louisiana state employee.

Name/Title	Project Roles and Background
Danielle Ferguson-Edgecombe <i>Account Executive</i>	<p>PROJECT ROLE:</p> <ul style="list-style-type: none"> ✓ Coordinates contracting, logistics and project initiation for survey administration ✓ Provides client perspective and project objectives ✓ Monitors all phases of client projects and serves as resource for any scope changes ✓ Consults with clients during the presentation and interpretation of Final Report results ✓ Advises client of result interrelationships across surveys <p>RELEVANT EXPERIENCE: Employed with The Myers Group since 2009, Ms. Ferguson-Edgecombe brings over six years of project management and customer service experience in both clinical and B2B environments. She works with many multi-state health plans on both standard and custom survey projects. Danielle currently holds the position representing The Myers Group as a Business Partner with WellCare Health Plans. She has also served as a Project Manager managing several types of healthcare survey projects from start-up</p>

	<p>to completion. Previously employed as a Project Coordinator for NeuroTrials Research and Atlanta School of Sleep, Danielle has supported clinical research efforts by providing project coordination, budgetary planning, employee training and web site implementation. Danielle holds a Bachelor of Health Sciences, Business Administration and Advertising/Marketing from Armstrong Atlantic State University. She also obtains a professional certificate in Project Management.</p>
<p>Debbie Vereb <i>Chief Operating Officer</i></p>	<p>PROJECT ROLE:</p> <ul style="list-style-type: none"> ✓ Directs the activities of all operational departments including Project Management, Information Systems and the Call Center ✓ Responsible for the design, operation, and improvement of the systems that create and deliver error-free and meaningful products/services to our clients. ✓ Oversees the operational details, planning and execution ✓ Develops and implements strategies for process improvements and future growth <p>RELEVANT EXPERIENCE: Employed with The Myers Group since 1997, Ms. Vereb brings more than 14 years of experience in healthcare research, strategic planning and organizational development. She leads and manages all operational departments with a focus on strategic, tactical, short and long term operations management. In addition, Ms. Vereb oversees the operational details and day-to-day execution necessary for success. Ms. Vereb has extensive leadership and management experience, including direct supervision of employees, staff recruiting, training, budgetary planning, and office management.</p> <p>She works closely with clients to develop long-term relationships and has personally managed multiple complex research projects to successful completion. Under her leadership and training, TMG's operations staff successfully managed timelines and outcomes for more than 500 various research projects during the past 12 months. Debbie has completed studies in Business Administration at Kennesaw State University.</p>
<p>Midge Coker <i>Director, Client Services</i></p>	<p>PROJECT ROLE:</p> <ul style="list-style-type: none"> ✓ Manages Project Managers and survey operations ✓ Coordinates logistics and resource allocation for survey operations ✓ Supports analysis, results interpretation, and reporting of study findings <p>RELEVANT EXPERIENCE: Employed with The Myers Group since 2001, Ms. Coker brings over 18 years of business management and consultative sales experience from various industries including survey research, print and television advertising. Prior to joining The Myers Group, Ms. Coker was an Account Executive for Perception Solutions, a survey research firm. She provided survey consultation, survey design assistance, and interpretation in the areas of educational program and faculty evaluation, conference and membership surveys for professional societies and trade associations. Midge is a graduate of The American Academy of Dramatic Arts.</p>

<p>Michael Mitchell <i>Executive Director of Operations</i></p>	<p>PROJECT ROLE:</p> <ul style="list-style-type: none"> ✓ Responsible for oversight of all operational processes and quality audits ✓ Monitors compliance with all federal and state requirements for data collection and submission ✓ Ensures adherence to all NCQA requirements outlined in Quality Assurance Plan ✓ Reviews internal systems, including transitions to new audit software <p>RELEVANT EXPERIENCE: Employed with The Myers Group since 1999, Mr. Mitchell brings over 15 years of project management and administrative leadership experience, including direct supervision of employees, staff recruiting, training, cost analysis, and office management. In addition, he has worked extensively within the insurance industry handling medical claims, claims cost containment, and workers' compensation medical and indemnity claims for multiple jurisdictions. Michael completed studies in Architecture at Georgia Institute of Technology.</p>
<p>Janice Karkula, <i>Director of Production Services</i></p>	<p>PROJECT ROLE:</p> <ul style="list-style-type: none"> ✓ Leads and directs Call Center Operations ✓ Responsible for providing leadership and oversight for Survey Administration Operations ✓ Works with Product Development team to develop and enhance TMG's Call Center Support Services ✓ Responsible for managing Call Center support projects to ensure superior customer service ✓ Manages production and reporting for Call Center and Survey Administration Operations <p>RELEVANT EXPERIENCE: Employed with The Myers Group since 2010, Ms. Karkula brings over 25 years of experience in senior operations and business development leadership in the healthcare industry, focusing on call center operations. She leads TMG's Call Center and Survey Administration operations as part of the company's continued growth, expansion of the Call Center facility, and increased Call Center support services. She works closely with the executive management team to develop strategic plans for growth with an emphasis on Call Center and Survey Administration operations. Janice holds a Master of Business Administration and Bachelor of Science in Accounting. She is also a member of the Medical Group Management Association (MGMA) and the Financial Management Association of MGMA.</p>

15. Identify (IN THE ATTACHED EXCEL DOCUMENT), all of your organization's publicly-funded managed care contracts for Medicaid/CHIP and/or other low-income individuals within the last five (5) years. In addition, identify, in Excel format your organization's ten largest (as measured by number of enrollees) managed care contracts for populations other than Medicaid/CHIP and/or other low-income individuals within the last five (5) years. For each prior experience identified, provide the trade name, a brief description of the scope of work, the duration of the contract, the contact name and phone number, the number of members and the population types (e.g., TANF, ABD, duals, CHIP), the annual contract payments, whether payment was capitated or other, and the role of subcontractors, if any. If your organization has not had any publicly-funded managed care contracts for Medicaid/SCHIP individuals within the last five (5) years, identify the Organization's ten largest (as measured by number of enrollees) managed care contracts for populations other than Medicaid/CHIP individuals within the last five (5) years and provide the information requested in the previous sentence. Include your organization's parent organization, affiliates, and subsidiaries.

PLEASE COMPLETE THIS QUESTION IN THE ATTACHED EXCEL DOCUMENT.

16. Identify whether your organization has had any contract terminated or not renewed within the past five (5) years. If so, describe the reason(s) for the termination/non-renewal, the parties involved, and provide the address and telephone number of the client. Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group works directly with many large MCOs across the United States and its territories. In our 18 year history, we have not had contracts terminated during the term of service. As with any company we have had contracts not renewed, due to competitive bids placed by other survey vendors.

- a. If the contract was terminated/non-renewed, based on your organization's performance, describe any corrective action taken to prevent any future occurrence of the problem leading to the termination/non-renewal. Include your organization's parent organization, affiliates, and subsidiaries.

No corrective actions were necessary as The Myers Group offers competitive pricing.

17. As applicable, provide (in table format) the Organization's current ratings as well as ratings for each of the past three years from each of the following:

- a. AM Best Company (financial strengths ratings);
- b. TheStreet.com, Inc. (safety ratings); and
- c. Standard & Poor's (long-term insurer financial strength).

As a limited liability corporation providing healthcare research survey services, TMG does not attain safety and/or financial strength ratings from the above mentioned rating organizations. However, we are a participating vendor of Dunn & Bradstreet, a commercial business credibility rating organization that provides insightful reports on companies' financial stability and credit rating. The Myers Group is listed under the Dunn & Bradstreet's following account number: 06-680-4142.

Please refer to attached report to review a comprehensive D&B report listing of The Myers Group's Credit Score and Financial Stress Class for the past three (3) years.

18. For any of your organization's contracts to provide physical health services within the past five years, has the other contracting party notified the Proposer that it has found your organization to be in breach of the contract? If yes:

- a. Provide a description of the events concerning the breach, specifically addressing the issue of whether or not the breach was due to factors beyond the Proposer's control.
- b. Was a corrective action plan (CAP) imposed? If so, describe the steps and timeframes in the CAP and whether the CAP was completed.
- c. Was a sanction imposed? If so, describe the sanction, including the amount of any monetary sanction (e.g., penalty or liquidated damage).
- d. Was the breach the subject of an administrative proceeding or litigation? If so, what was the result of the proceeding/litigation? Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group is a nationally recognized leader in healthcare survey research and does not provide physical health services.

19. Indicate whether your organization has ever sought, or is currently seeking, National Committee for Quality Assurance (NCQA) or American Accreditation HealthCare Commission (URAC) accreditation status. If it has or is, indicate current NCQA or URAC accreditation status and accreditation term effective dates if applicable.

The Myers Group is an NCQA accredited vendor for the administration of the Consumer Assessment of Healthcare Providers and Systems (CAHPS), Health Outcomes Survey (HOS), and Medicare-Consumer Assessment of Healthcare Providers and Systems (M-CAHPS).

20. Have you ever had your accreditation status (e.g., NCQA, URAC,) in any state for any product line adjusted down, suspended, or revoked? If so, identify the state and product line and provide an explanation. Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group has maintained its accreditation status without issue, suspension or revoke.

21. If you are NCQA accredited in any state for any product line, include a copy of the applicable NCQA health plan report cards for your organization. Include your organization's parent organization, affiliates, and subsidiaries.

The Myers Group is a certified HEDIS vendor. Therefore, The Myers Group provides a service to our healthcare clients who are seeking or have accreditation for product lines in various states. The level of work we provide to our clients does not require that we have accreditation for any product lines in any states.

22. Provide (as an attachment) a copy of the most recent external quality review report (pursuant to Section 1932(c)(2) of the Social Security Act) for the Medicaid contract identified in response to item #15 above that had the largest number of enrollees as of January 1, 2011. Provide the entire report. In addition, provide a copy of any corrective action plan(s) requested of your organization (including your organization's parent organization, affiliates, and subsidiaries) in response to the report.

The Myers Group has had external quality reviews conducted as part of our certification to conduct specific surveys. NCQA and CMS performed site visits reviewing our operations and oversight activities for CAHPS, MCAHPS, and HOS administration. Reports of their site visits cannot be provided as these agencies have restrictions on distributing any communications between our organization and NCQA and CMS.

In addition, TMG has had external site visits conducted by our clients to review our operations. For example, WellCare's Delegation Oversight Committee recently conducted a desk audit on the services provided by TMG for WellCare. TMG is awaiting the feedback from this desk audit

conducted on May 10th, 2011. TMG also has had a Global Oversight Audit conducted by WellCare in January 2011.

Results from this audit have been attached for your convenience.

- 23. Identify and describe any regulatory action, or sanction, including both monetary and non-monetary sanctions imposed by any federal or state regulatory entity against your organization within the last five (5) years. In addition, identify and describe any letter of deficiency issued by as well as any corrective actions requested or required by any federal or state regulatory entity within the last five (5) years that relate to Medicaid or CHIP contracts. Include your organization's parent organization, affiliates, and subsidiaries.**

Not applicable.

- 24. Provide a statement of whether your organization is currently the subject or has recently (within the past five (5) years) been the subject of a criminal or civil investigation by a state or federal agency other than investigations described in response to item #12 above. If your organization has recently been the subject of such an investigation, provide an explanation with relevant details and the outcome. If the outcome is against your organization, provide the corrective action plan implemented to prevent such future offenses. Include your organization's parent company, affiliates and subsidiaries.**

Not applicable.

June 16, 2011

Wade Davenport
Director, Strategic Sourcing
WellCare Health Plans, Inc.
8735 Henderson Road
Renaissance Two
Tampa, FL 33634

Dear Mr. Davenport:

We understand that the Louisiana Department of Health and Hospitals (“DHH”) is soliciting competitive proposals for managed care services through Medicaid Coordinated Care Network Request for Proposals (RFP # 305PUR-DHHRFP-CCN-P-MVA) (the “RFP”), and that WellCare Health Plans, Inc., through certain affiliates (“WellCare”), intends to respond to the RFP.

We also understand that, pursuant to the RFP Proposal Submission and Evaluation Requirements, Part II, Item B.7, WellCare is required to submit from the parent organization of each major subcontractor a statement that the parent organization will guarantee performance by the subcontractor.

Please accept this correspondence as the required statement that The Myers Group, a proposed subcontractor for WellCare’s Medicaid managed care business in the State of Louisiana, will unconditionally guarantee performance by The Myers Group of each and every obligation, warranty, covenant, term and condition of the contract.

Sincerely,



Danielle Ferguson-Edgecombe
Account Executive
Patient Satisfaction Plus, LLC

Below please list all of your organization's publicly funded managed care contracts for Medicaid/CHIP and/or other low income individuals within the last five (5) years.

Type of Publicly Funded Managed Care Contract (ex; Medicare, Medicaid, CHIP, SCHIP, and/or other low income individuals)	Trade Name	Description of Scope of Work	Duration of Contract	Contact Name	Contact Phone Number	Number of Members	Population Types (ex: TANF, ABD, Duals, CHIP)	Annual Contract Payments	Type of Payment (ex: Capitated or Other)	Role of any additional subcontractor (if any)
Medicare, Medicaid	Humana Health Plans	TMG conduct the regulatory surveys which are CAHPS, HOS and MCAHPS.	5 years	Darlene Holzbach	502-580-5840	8,334,800	Duals	Unknown	Unknown	N/A
Medicare, Medicaid	WellCare Health Plans, Inc.	TMG conduct the regulatory surveys which are CAHPS, HOS and MCAHPS. TMG also conducts several customized surveys.	3 years - CAHPS, HOS, M-CAHPS	Tom Clegg	800-960-2530	1,630,846	Duals	Unknown	Unknown	N/A
Medicaid	MDwise	TMG conducts the regulatory CAHPS survey.	Varies	Barbara Wilder	317-822-7115	316,771	Duals	Unknown	Unknown	N/A
Medicaid	Michigan Department of Community Health	TMG conducts the regulatory CAHPS survey.	Varies	Joyce Hight	517-335-5246	Unknown	Duals	Unknown	Unknown	N/A
Medicaid, Medicare	UPMC Health Plan	TMG conducts the regulatory CAHPS survey.	3 years - CAHPS, HOS, M-CAHPS	Laura Kessler	412-454-8550	577,463	Duals, CHIP	Unknown	Unknown	N/A
Medicaid	APS-Healthcare, Inc.	TMG conducts the regulatory CAHPS survey.	Varies	Ruthanne Landsness	608-283-3683	Unknown	Duals	Unknown	Unknown	N/A
Medicare	AULTCARE CORPORATION	TMG conducts the HOS survey.	3 year-HOS	Lindsay Shearer	330-363-2425	106,484		Unknown	Unknown	N/A
Medicare	Regence BlueShield	TMG conducts the HOS survey.		Colette Arvidson	360-755-2735	2,174,156		Unknown	Unknown	N/A
Medicaid, Medicare	Health Partners of Philadelphia	TMG conducts the HOS and CAHPS surveys.	Varies	Carol Smolij	215-991-4251	820,668	Duals, CHIP	Unknown	Unknown	N/A
Medicaid	NETWORK HEALTH	TMG conducts the CAHPS survey	Varies	Christine Fahey	781-393-3596	174,388	Duals	Unknown	Unknown	N/A

Below please list all of your organization's 10 largest (as measured by number of enrollees) managed care contracts for populations other than Medicaid/CHIP and/or other low income individuals within the last five (5) years.

Type of Managed Care Contract	Trade Name	Description of Scope of Work	Duration of Contract	Contact Name	Contact Phone Number	Number of Members	Population Types (ex: TANF, ABD, Duals, CHIP)	Annual Contract Payments	Type of Payment (ex: Capitated or Other)	Role of any additional subcontractor (if any)
Commercial	Humana Health Plans	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Darlene Holzbach	502-580-5840	8,334,800	Commercial	Unknown	N/A	N/A
Commercial	Harvard Pilgrim Healthcare	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Colleen Harwood	617-509-7879	1,130,957	Commercial	Unknown	N/A	N/A

Commercial	Emblem Health Services	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Jeanne Davin	845-340-2241	2,605,427	Commercial	Unknown	N/A	N/A
Commercial	Blue Cross Blue Shield Massachusetts	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Lora Goodman	617-246-2486	2,836,106	Commercial	Unknown	N/A	N/A
Commercial	Highmark Blue Cross Blue Shield	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Sheryl Maletic	412-544-1950	4,214,412	Commercial	Unknown	N/A	N/A
Commercial	Tufts Associated Health Plans, Inc.	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Wendy Jacobsen	617-972-9400	718,182	Commercial	Unknown	N/A	N/A
Commercial	Capital Districts Physicians; Health Plan, Inc.	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Pat Weafer	518-641-3240	272,675	Commercial	Unknown	N/A	N/A
Commercial	Regence BlueShield	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Colette Arvidson	360-755-2735	2,174,156	Commercial	Unknown	N/A	N/A
Commercial	UPMC Health Plan	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Laura Kessler	412-454-8550	577,463	Commercial	Unknown	N/A	N/A
Commercial	Medical Mutual of Ohio	The Myers Group conducts the CAHPS survey and other custom survey projects.	Varies by survey product.	Kim Lane	216-687-7914	2,921,529	Commercial	Unknown	N/A	N/A



WellCare Health Plans, Inc
A Member of the WellCare Group of Companies

Corrective Action Plan

Agency:
The Myers Group

Audit Date:
1/19/2011

Date of Correction Action Plan:
3/30/2011

ID	Identified Problem	Area of Delegation	Responsible Party	Actions/Interventions	Reports Due	Date Due	Comment/Status
1	(m) Security Management Process §164.308(a)(1)(i) a. Annual HIPAA risk analysis completed? b. Corrective actions taken to reduce identified risks? Combined the 2 risk questions into 1 CAP item. Need evidence of a HIPAA risk program.	Global			HIPAA Risk Assessment Policy	90 days	3/22/11: BA is working with consultants to develop a living HIPAA risk assessment program.
2	(u) Emergency Mode Operation Plan §164.308(a)(7)(ii)(C) a. In case of an emergency, are there procedures providing for alternative security measures to protect ePHI and the systems that provide access to ePHI? 3/23/11: BA presented The HIPAA Policies and Procedures, pg 15. This denotes the everyday security, not the alternative security measures in case of an emergency. Request Policy/Procedure covering an emergency as per the Standard.	Global			Emergency Action Plan Security Procedure	90 days	

Corrective Action Plan Prepared by: Bill Gallaway

Date: 03/30/11

Presented to Delegation Oversight Committee:

Date: 04/26/11

Notification to Entity:

Date: 04/26/11



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**Addendum A
 Global Audit Tool**

Entity: The Meyers Group **LOB:** CCP, EAS EHK WHK WMC NMD CHP FHP GMD IMD MMD PDP OMD ZAB
Type of Delegation: Pre-Delegation Annual Delegation Desk Review

Date: 1/19/2011
 On-site

AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
I. Compliance					
a) Compliance Plan (Policy and Procedures)					
II. HIPAA Privacy					
a) Awareness of Business Associate contract and requirements for HIPAA Privacy/Security (PHI) .		X			Review Team Observed (RTO) : BA understands its HIPAA Privacy and Security responsibilities as referenced in BA agreement with WellCare.
b) Written policies and procedures regarding HIPAA Privacy and Security (PHI).		X			RTO: BA presented review team with eleven chapter policy book that addresses HIPAA Privacy and Security.
c) HIPAA Training – rosters / dates (Privacy, Security, ARRA/breach).		X			RTO: BA presented sample training roster with completion dates.
d) Awareness of Notice of Privacy practices and procedures for providing to members.	X				



WellCare Health Plans, Inc.
A Member of the WellCare Group of Companies

Addendum A
Global Audit Tool

Entity: The Meyers Group **LOB:** CCP, EAS EHK WHK WMC NMD CHP FHP GMD IMD MMD PDP OMD ZAB
Type of Delegation: Pre-Delegation Annual Delegation Desk Review

Date: 1/19/2011
 On-site

AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
e) Awareness of Process to allow individuals access to PHI, including: <ul style="list-style-type: none"> ➤ Access ➤ Amend ➤ Restrictions ➤ Accounting of Disclosures ➤ Member right to authorize / deny use of PHI outside of treatment, payment or operations (TPO) 		X			BA Provided (BAP): Policy book chapter three.
f) Understanding of requirement to not use or disclose PHI other than as permitted by plan or required by law.		X			BAP: Policy book chapter three, page 8. RTO: Confirmed via interview.
g) Ensure that subcontractors agree to the same restrictions and conditions with regard to PHI – identify any subcontractors, ensure plan approval, ensure agreements with flow-down HIPAA provisions.		X			BAP: BA Agreement in policy book chapter 10, Confidentiality Agreement in policy book chapter 11.
h) Make necessary information available and notify the organization of any use or disclosure of PHI that is inconsistent with the uses and disclosures – evaluate understanding of BA breach reporting requirements.		X			BAP: Chapter 1 "Reporting A HIPAA Violation". Recommendation: Add a section for notifying WellCare of a breach that matches the terms of the BA Agreement. Goal is to be notified immediately. 3/22/11: BA provided additional



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**Addendum A
Global Audit Tool**

Entity: The Meyers Group **LOB:** CCP, EAS EHK WHK WMC NMD CHP FHP GMD IMD MMD PDP OMD ZAB
Type of Delegation: Pre-Delegation Annual Delegation Desk Review

Date: 1/19/2011
 On-site

AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
					evidence in the HIPAA policies and procedures handbook, page 8-9
i) Procedures for return, destruction and restrictions of further use of PHI.		X			Determined by WellCare BA.
j) Designates either an internal staff member as chief privacy officer or an internal privacy committee. The chief privacy officer or the committee is involved in developing and implementing privacy policies.		X			BAP: Privacy Officer, Traci Loeser. Recommendation: Create policy that outlines responsibilities of the Privacy Officer. 3/22/11: BA provided additional evidence in the HIPAA policies and procedures handbook, page 7.
k) Review site privacy procedures – clean desk, fax, email, printers.		X			BAP: Training documents detail clean desk procedures. RTO: Confirmed that clean desk procedures are being followed. Recommendation: Create a formal clean desk policy and procedure. 3/22/11: BA provided additional evidence, Clean Desk Policy.



WellCare Health Plans, Inc.
A Member of the WellCare Group of Companies

**Addendum A
Global Audit Tool**

Entity: The Meyers Group **LOB:** CCP, EAS EHK WHK WMC NMD CHP FHP GMD IMD MMD PDP OMD ZAB
Type of Delegation: Pre-Delegation Annual Delegation Desk Review

Date: 1/19/2011
 On-site

AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
l) Display the following on website, if applicable	X				
• Information collected on the website	X				
• Use of information collected on the website	X				
III. HIPAA Security					
m) Security Management Process §164.308(a)(1)(i)					
a. Annual HIPAA risk analysis completed?			X		RTO: Interview and Observation identified that BA acknowledged that they review areas of risk and adjust policies as needed. Recommendation: Create policy and procedure detailing the HIPAA risk assessment process.
b. Corrective actions taken to reduce identified risks?			X		
n) Sanction Policy §164.308(a)(1)(ii)(C)					
a. Corporate HR policy & procedure have specific remedial actions against employees for HIPAA violations?		X			BAP: Sanctions Policy: chapter 1 page 10.
o) Assigned Security Responsibility §164.308(a)(2)					
a. Is there a corporate Information Security Officer		X			BAP: Michael Mitchell Chapter 1. page 14 Recommendation:



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
					Create policy outlining responsibilities of Chief Security Officer. 3/22/11: BA provided additional evidence in the HIPAA policies and procedures handbook, page 15.
b. Locally, is there a person assigned responsibility for information security?		X			BAP: Michael Mitchell
p) Workforce Security §164.308(a)(3)(i)					
a. When a new employee is hired, is there a documented process followed to appropriately authorize and obtain network and computer access?		X			BAP: Technical Security Policy, Access Controls page 2.
q) Termination Procedures §164.308(a)(3)(ii)(C)					
a. Are there documented procedures to remove an employee's physical access to the facility?		X			BAP: Technical Security Policy, Logical Access to Computer Systems page 16. Recommendation: Under work status change, last sentence, change "...and" is considered a risk to "or" is considered a risk...
b. Are there documented procedures to remove an employee's logical access to computer systems?		X			BAP: Technical Security Policy, Access Controls page 2.



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
r) Security Awareness and Training §164.308(a)(5)(i)					
a. Is there a security awareness and training program for all members of the workforce (including management)?		X			BAP: HIPAA Training, Chapter 5 RTO: Confirmed training via interviews, and previewed training room.
b. Is the training completed at least annually?		X			BAP: Training roster.
s) Password Management §164.308(a)(5)(ii)(D)					
a. Are there procedures for creating, changing, and safeguarding passwords?		X			BAP: Chapter 1, page 11
b. Are users assigned a unique User ID? (§164.312(a)(2)(i))		X			BAP: Unique IDs are mentioned throughout the policy book.
c. Is there a policy and procedure that users must not share User IDs or Passwords?		X			BAP: Chapter 1, page 11
t) Security Incident Procedures §164.308(a)(6)(i)					
a. Are there policies and procedures to address security incidents?		X			BAP: Chapter 1, page 14
b. Does the security incident procedure identify the BA's local and corporate contacts to whom security incidents must be reported?		X			BAP: Chapter 1, page 14



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 On-site

AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
c. Does the security incident procedure identify WellCare's contacts (phone and email) to whom security incidents must be reported?		X			BA Attested: Privacy officer is aware of requirements to report to WellCare contact immediately. 3/22/11: BA provided additional evidence, HIPAA Policies and Procedures Handbook, pg 8, Reporting a HIPAA Violation /Breach of PHI
d. Are the security incident reporting procedures posted for easy access and/or viewing by all workforce members (employees / agents)?		X			BA Attested: Incident reporting procedures are posted on intranet site.
u) Emergency Mode Operation Plan §164.308(a)(7)(ii)(C)					
a. In case of an emergency, are there procedures providing for alternative security measures to protect ePHI and the systems that provide access to ePHI?			X		3/23/11 BA presented The HIPAA Policies and Procedures, pg 15. This denotes the everyday security, not the alternative security measures in case of an emergency.
v) Facility Security Plan §164.310(a)(2)(ii)					



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Type of Delegation: Pre-Delegation Annual Delegation Desk Review

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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
a. Are there policies and procedures to safeguard the facility and the equipment therein from unauthorized physical access, tampering, and theft?		X			BAP: Policy book Chapter 1: TMG HIPAA Policies and Procedures.
w) Access Control and Validation Procedures §164.310(a)(2)(iii)					
a. Are areas within the facility restricted based on job role and responsibility?		X			RTO: The Myers Group controls access with a badge system. Areas are secured by job role.
x) Maintenance Records §164.310(a)(2)(iv)					
a. Are there policies and procedures to document repairs and modifications to the physical components of a facility which are related to security (for example, hardware, walls, doors and locks)?		X			Recommendation: Submit (or create) policies and procedures that comply with the Maintenance Records requirements in the CFR. 3/22/11: BA provided additional evidence, Facilities Maintenance Policy, page 3.
y) Workstation Use §164.310(b)					



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
a. Are laptop computers used at the facility? If so: b. If the users can access member data from the laptops, are:		X			BA Attested: Laptops are not used to access member information. RTO: Physical security of laptops in transport was mentioned in the training; however, no formal laptop security policy exists. Recommendation: Submit (or create) a policy that addresses the security of laptop use at the facility, either issued or by guests. 3/22/11: BA provided additional evidence, Laptop Security Policy (DRAFT version) if fully implemented will suffice for the review. Validate implementation on next review.
i. the laptop computers encrypted?		X			Recommendation: Submit (or create) a policy that addresses the security of laptop use at the facility. 3/22/11: BA provided additional evidence, Laptop Security Policy (DRAFT version) if fully implemented will suffice for the review. Validate implementation on next review.



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
					Crypto key management was noted on page 2.
c. are the CD/DVD drives configured for read only and not allow writes or recording?		X			Recommendation: Submit (or create) policy that requires that write access to ancillary drives be disabled, and that exceptions for individual users be documented. 3/22/11: BA provided additional evidence, Laptop Security Policy (DRAFT version) if fully implemented will suffice for the review. Validate implementation on next review.
d. are USB and similar ports configured for read only?		X			Recommendation: Submit (or create) policy that requires that write access to ancillary drives be disabled, and that exceptions for individual users be documented. 3/22/11: BA provided additional evidence, Laptop Security Policy (DRAFT version) if fully implemented will suffice for the review. Validate implementation on next review.
z) Workstation Security §164.310(c)					



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
a. Are there policies and procedures requiring users to logically lock computers when leaving their desk?		X			BAP: Policy book Chapter 1: TMG HIPAA Policies and Procedures. Page 12
b. Are laptops secured to the desk with a cable lock?	X				
aa) Device and Media Controls §164.310(d)(2)					
a. Are there policies and procedures requiring that all computer disk drives are cleansed of any possible PHI before re-use, repair, disposal, or transfer offsite?		X			BAP: Policy book Chapter 1: TMG HIPAA Policies and Procedures. Page 14 Recommendation: Create a standard that defines requirements for removing data (i.e. NIST or DOD qualified software). Include requirements for ancillary drives (printers, fax machines, copiers, etc.) whether leased or owned.
bb) Accountability §164.310(d)(2)(iii)					
a. Are there policies and procedures to appropriately track and log all movement of information systems and electronic media containing ePHI to various organizational locations?		X			BA Attested: They have only one office and systems are not transported. Recommendations: Create a policy that specifically deals with the requirements mandated by this standard.
cc) Automatic Logoff §164.312(a)(2)(iii)					



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
a. Are there policies and/or procedures for terminating users' sessions after a certain period of inactivity on systems that contain or have the ability to access ePHI?		X			BAP: Chapter 1, Page 12 Recommendation: Update policy to include that terminals auto reset after 10 minutes as discovered in interviews. Documentation states that system will be locked down (no mention of auto reset).
dd) Transmission Security §164.312(e)(1)					
a. Are there policies and/or procedures that appropriately protect the confidentiality, integrity, and availability of the ePHI it transmits over electronic communications networks? For example, is the network used by agents to access the WellCare network segmented (vLan) and/or firewalled from the organization's primary network?		X			RTO: The Myers Group uses TLS encryption for email to/from WellCare, and they transfer data via FTP. Recommendation: Create a standard that specifies the different transmission modes and how they are secured.
b. Are wireless networks used to access ePHI? If so,					
i. are there policies and procedures detailing the security requirements for wireless devices?		X			BA Attested: Internal WIFI is set to WPA2, non-broadcast. Recommendation: Create P&Ps that address wireless security.



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
ii. is the wireless network properly secured and forces encryption (for example, use WPA2 and not WEP)?		X			BA Attested: Internal WIFI is set to WPA2, non-broadcast. Recommendation: Create P&Ps that address wireless security.
ee) Documentation §164.316(b)(1)					
a. Are there policies and procedures to appropriately maintain, distribute, and review the security policies and procedures the company implements to comply with the HIPAA Security Rule?					
i. For example, is documentation available in printed manuals and/or on Intranet websites?		X			RTO: Training and policies are available on intranet site. Recommendation: Ensure that there is a policy that addresses the policy program. This will cover communication of policies, policy reviews and updates.
ff) Time Limit § 164.316(b)(2)(i)					
a. Does the company have a document retention policy and procedures to enforce the minimum under the Security Rule?		X			BAP: Chapter 4: Record Retention Policy, Page1 Recommendation: Create a standard that documents the retention schedule for the



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
					requirements noted in paragraph 2 of the policy.
gg) Updates §164.316(b)(2)(iii)					
a. Are there policies and/or procedures for the reviewing documentation periodically, and update as needed, in response to environmental or operational changes affecting the security of the electronic protected health information?		X			BAP: Appendix A, Page 15 under Security Management. Recommendation: Create a policy that addresses the overall policy program. This will cover communication of policies, policy reviews and updates.
IV. Record Retention					
a) Provide for inspections of any records pertinent to the contract by the Plan, and appropriate State and Federal Agencies		X			BAP: Chapter 4: Record Retention Policy, Page1 Recommendation: Create a standard that documents the retention schedule for the requirements noted in paragraph 2 of the policy.
b) Require an adequate record system be maintained for recording services, charges, dates and all other commonly accepted information elements for services rendered to Plan Members under the contract.		X			BAP: Chapter 4: Record Retention Policy, Page1



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
c) Require that records be maintained for a period not less than Ten (10) years from the close of the contract and retained further if the records are under review or audit until the review or audit is complete. (Prior approval for the disposition of records must be requested and approved by the Plan if the subcontract is continuous.)		X			BAP: Chapter 4: Record Retention Policy, Page1
d) There is a designated staff person who is qualified in training and experience for oversight of and access to the medical records system		X			BAP: Chapter 4: Record Retention Policy, Page1
e) There is a written policy on confidentiality of medical records, which ensures records are handled to preclude loss, tampering, alteration, destruction, and unauthorized disclosure of confidential information		X			BAP: Chapter 4: Record Retention Policy, Page1
f) All WellCare Data is stored in a physically and logically secure environment which protects such WellCare Data from unauthorized access, modification, theft, misuse and destruction		X			BAP: Chapter 4: Record Retention Policy, Page1
g) Awareness of Records and Information Management Policy and Records Retention Schedules		X			Per contract
h) Provides Destruction Notices when physical (paper) or electronic records are destroyed		X			Per contract
i) Does not destroy physical or electronic records without written consent from WellCare Legal Services		X			Per contract



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
V. Fraud, Waste and Abuse Training					
a) Provides Fraud, Waste and Abuse training to all employees and network personnel on an annual basis		X			BAP: The Myers Group takes WellCare's FWA Training.
b) Maintains evidence of Fraud, Waste and Abuse training via sign in sheets and learning agendas/objectives		X			BAP: The Myers Group takes WellCare's FWA Training.
VI. Fraud, Waste and Abuse Training					
Validate Delegated Entity FWA Training contains the following topics: <ul style="list-style-type: none"> ▪ Laws and regulations related to Medicare Advantage (MA) and Medicare Part D fraud, waste and abuse (i.e., False Claims Act, Anti-kickback statute, HIPAA, etc.) ▪ Obligations of the first-tier, downstream and related entities, to have appropriate policies and procedures to address fraud, waste and abuse. ▪ Process for reporting suspected fraud, waste and abuse of first-tier, downstream and related entities to the MA organization or prescription drug plan (PDP) sponsor. ▪ Protections for employees of first-tier, downstream and related entities, who report suspected fraud, waste and abuse. ▪ Types of fraud, waste and abuse that can occur in first-tier, downstream and related entities. 		X			BAP: The Myers Group takes WellCare's FWA Training.
Validation of signed FWA Training Rosters and/or training certificates		X			BAP: The Myers Group takes WellCare's FWA Training.
Validation of test scores from FWA Training Module if module included testing		X			BAP: The Myers Group takes WellCare's FWA Training.



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AUDIT SECTION/ELEMENTS	N/A	FULL COMPLIANCE	PARTIAL COMPLIANCE	NO COMPLIANCE	COMMENTS
Conduct staff interviews to ensure the following: <ul style="list-style-type: none"> ▪ Understanding the definitions of Fraud, Waste and Abuse ▪ Examples of Fraud, Waste and Abuse ▪ Fraud, Waste and Abuse Red Flags ▪ Understanding of the obligations and duties under the Anti-Kickback Act, False Claims Act and Civil Monetary Penalties Law ▪ Understanding of the obligation and duty to report suspected health care fraud ▪ Awareness of the process for reporting suspected fraud, waste and abuse 		X			BAP: The Myers Group takes WellCare's FWA Training.
Compliance Assessment (count)	5	57	3	0	
Overall Compliance Score		95%	5%	0%	

Auditor Name/Title: Craig Lewis Date: 3/30/2011

Auditor Name/Title: Bill Gallaway Date: 3/30/2011



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- [Creditworthiness](#)
- [Payment History & Trends](#)
- [Public Filings](#)
- [History & Operations](#)
- [Banking & Finance](#)

Company Snapshot

Business Summary

Profile

PATIENT SATISFACTION PLUS, LLC
 2351 Henry Clower Blvd Ste D
 Snellville, GA 30078

Tel: 770 978-3173
 Fax: 770 962-5185

D-U-N-S #: 06-680-4142
 MYERS GROUP, THE
 D&B Rating: --

Company Stats

Year started	1995
Employees	58
Financial condition	UNBALANCED
Financial statement date	Dec 31, 2008
Net worth	\$(747,165)
Sales F	\$9,738,582
Manager	Ac Myers , Ceo
S.I.C.	8732
Industry	
Commercial nonphysical research svcs	

This is a single location.

The Net worth amount in this section may have been adjusted by D&B to reflect typical deductions, such as certain intangible assets.

Likelihood this company will not pay on time over the next 12 months	LOW <input checked="" type="checkbox"/>
Credit Score Class: 1	

Likelihood this company will experience financial stress in the next 12 months	AVERAGE
Financial Stress Class: 3	

Timeliness of historical payments for this company**	PROMPT <input checked="" type="checkbox"/>
D&B PAYDEX®: 80	
Anticipates Prompt 30 days slow 120 days slow	
Industry benchmark: Prompt **Based on 25 trade experiences on file with D&B	

Payment performance trend over the past 90 days	
---	--

D&B offers guidance on credit limits for this company based on its profile as well as profiles of other companies similar in size, industry, and credit usage

[Get details](#)

Evidence of bankruptcy, fraud, or criminal proceedings in the history of this business or its management

NO

Noteworthy special events in this company's file

YES

Total number of suits, liens and judgments in this company's file

0

Value of open suits, liens and judgments for this company

\$0

Value of open records refers only to 10 most recent filings for each record type. There may be additional suits, liens, judgments, or UCC filings in

D&B's file on this company available by contacting 1-866-472-7362.

Company Snapshot	Creditworthiness	Payment History & Trends	Public Filings	History & Operations	Banking & Finance
----------------------------------	----------------------------------	--	--------------------------------	--	---------------------------------------

Creditworthiness

Summary

Likelihood this company will experience financial stress in the next 12 months

AVERAGE 

Likelihood this company will not pay on time over the next 12 months

LOW 

D&B Rating: --

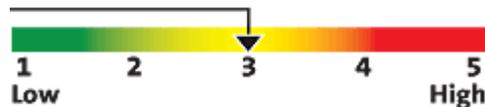
The blank rating symbol should not be interpreted as indicating that credit should be denied. It simply means that the information available to D&B does not permit us to classify the company within our rating key and that further enquiry should be made before reaching a decision. Some reasons for using a "-" symbol include: deficit net worth, bankruptcy proceedings, insufficient payment information, or incomplete history information. For more information, see the D&B Rating Key.

Default on Payment: Financial Stress Summary

Likelihood this company will experience financial stress in the next 12 months

AVERAGE 

Financial Stress Class: 3



Financial stress national percentile: 44 (highest risk: 1%; lowest risk: 100%)

National percentile industry norm: 52 (highest risk: 1%; lowest risk: 100%)

During the prior year, firms in this Financial Stress Class had a failure rate of 0.24%, which is 2 times lower than the national average.

Key Factors

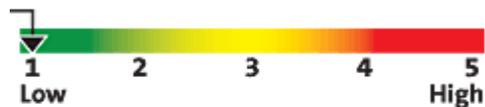
- 25 trade experiences exist for this company.
- Financial Stress Score: 1470 (high risk: 1,001; low risk: 1,875)
- Financial condition is rated unbalanced.
- UCC Filings reported.
- High number of inquiries to D&B over last 12 months.
- Business does not own facilities.

Payment within Terms: Credit Score Summary

Likelihood this company will not pay on time over the next 12 months

LOW 

Credit Score Class: 1



The Credit Score class of 1 for this company shows that 6.0% of firms with this class paid one or more bills severely delinquent, which is lower than the average of businesses in D&B's database.

Credit score percentile: 98 (high risk: 1%; low risk: 100%)

Industry norm percentile: 46 (high risk: 1%; low risk: 100%)

Key Factors

- 25 trade experiences exist for this company.
- Low number of satisfactory payments.
- Insufficient number of payment experiences.
- Business is not a subsidiary.
- Low proportion of satisfactory payment experiences to total payment experiences.

Additional Information

Financial Stress Summary

- The Financial Stress Risk Class indicates that this firm shares some of the same business and financial

Credit Score Summary

- The Incidence of Delinquent Payment is the percentage of companies with this classification that were reported 90

- characteristics of other companies with this classification. It does not mean the firm will necessarily experience financial stress.
- The probability of failure shows percentage of firms in a given percentile that discontinue operations with loss to creditors. The average probability of failure is based on businesses in D&B's database and is provided for comparative purposes.
 - The Financial Stress Score Percentile reflects the relative ranking of a company among all scorable companies in D&B's file.
 - The Financial Stress Score offers a more precise measure of the level of risk than the Risk Class and Percentile. It is especially helpful to customers using a scorecard approach to determining overall business performance.

days past due or more by creditors. The calculation of this value is based on an inquiry weighted sample.

- The Percentile ranks this firm relative to other businesses. For example, a firm in the 80th percentile has a lower risk of paying in a severely delinquent manner than 79% of all scorable companies in D&B's files.

Company Snapshot	Creditworthiness	Payment History & Trends	Public Filings	History & Operations	Banking & Finance
----------------------------------	----------------------------------	--	--------------------------------	--	---------------------------------------

Payment History

Summary

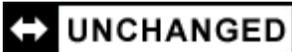
Average payment performance trend when weighted by dollar amount	UNCHANGED 	Company's payment performance over the past 12 months compared with its peers	AHEAD 
--	---	---	---

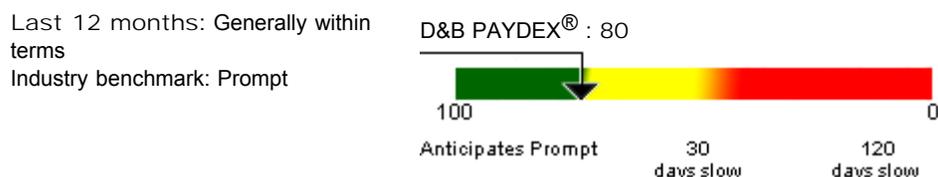
Payment History Overview

Payment experiences on file with D&B:	25	Average highest credit:	\$1,538
Payments made within terms:	25 (100%)	Largest high credit:	\$5,000
Amount placed for collections:	0 (0%)	Highest now owing:	\$5,000
		Highest past due:	\$0

Historical Payment Trends: PAYDEX®

Average payment performance trend when weighted by dollar amount

Last 3 months: Trend is unchanged 

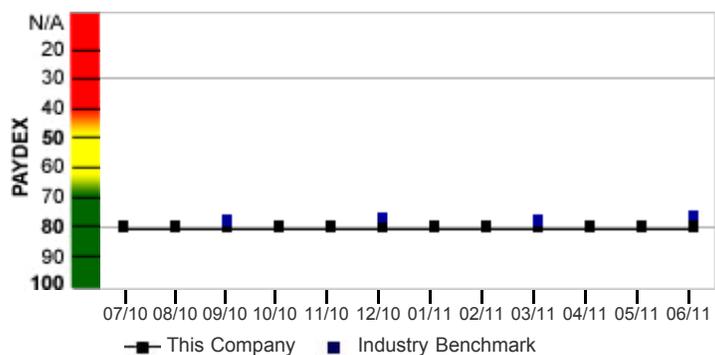


Based on payments collected over last 12 months. Indications of slowness can be the result of dispute over merchandise, skipped invoices, etc. Accounts are sometimes placed for collection even though the existence or amount of the debt is disputed.

Historical Payment Trends: PAYDEX® Comparison to Industry

Company's payment performance over the past 12 months compared with its peers **AHEAD** 

This company's 12-month high: 80, or equal to generally within terms
This company's 12-month low: 80, or equal to generally within terms



Shows PAYDEX scores of this Business compared to the Primary Industry from each of the last four quarters. The Primary Industry is Commercial nonphysical research svcs, based on SIC code 8732.

Payment History Details

Date Reported	Paying Record	High Credit (\$)	Now Owes (\$)	Past Due (\$)	Selling Terms	Last Sale Within (months)
05/11	Prompt	5,000				1
05/11	Prompt	1,000	250	0		1
05/11	Prompt	1,000	0	0	Lease Agreemnt	4-5
05/11	Prompt	1,000	1,000	0	Net30	1
05/11	Prompt	500	0	0	Lease Agreemnt	4-5
05/11	Prompt	250	250	0		1
05/11	Prompt	250	0	0	Lease Agreemnt	4-5
05/11	Prompt	250	0	0	Lease Agreemnt	4-5
04/11	Prompt	5,000	5,000	0		1
04/11	Prompt	5,000	5,000	0		1
04/11	Prompt	2,500	0	0		1
04/11	Prompt	1,000	1,000	0		1
04/11	Prompt	1,000	0	0		6-12
04/11	Prompt	1,000	0	0		1
04/11	Prompt	500	0	0		2-3
12/10	(016)	50			Cash account	6-12
11/10	Prompt	2,500	0	0	Net30	6-12
11/10	Prompt	2,500	2,500	0		1
11/10	Prompt	1,000	0	0	Net30	1
11/10	Prompt	50	0	0		4-5
11/10	(021)	0	0	0	Cash account	6-12
06/10	(022)	250	0	0		6-12
	Cash own option.					
02/10	(023)	50			Cash account	1
11/09	Prompt	500	100	0		1
09/09	Prompt	500	0	0		6-12

Payment experiences reflect how bills are met in relation to the terms granted. In some instances payment beyond terms can be the result of dispute over merchandise, skipped invoices, etc.

Each experience shown is from a separate supplier. Updated trade experiences replace those previously reported.

Payment Analysis By Industry

Company's dollar-weighted payments listed by the primary industries of its suppliers

	Total	Total	Largest	Within	Slow 1-	Slow 31-	Slow 61-	Slow
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	Received (#)	Dollar Amount (\$)	High Credit (\$)	Terms	30	60	90	91+
					(% of dollar amount)			
Industry								
Misc business service	6	6,250	2,500	100	0	0	0	0
Misc business credit	6	3,500	1,000	100	0	0	0	0
Nonclassified	2	5,050	5,000	100	0	0	0	0
Personal credit	2	3,500	2,500	100	0	0	0	0
Public finance	1	5,000	5,000	100	0	0	0	0
Electric services	1	5,000	5,000	100	0	0	0	0
Whol computers/softwr	1	2,500	2,500	100	0	0	0	0
Whol electronic parts	1	1,000	1,000	100	0	0	0	0
Whol service paper	1	500	500	100	0	0	0	0
Other payment categories								
Cash experiences	4	350	250					
Payment record unknown	0	0	0					
Unfavorable comments	0	0	0					
Placed for collection								
With D&B	0	0	0					
Other	0	N/A	0					
Total in D&B's file	25	32,650	5,000					

There are 25 payment experiences in D&B's file for the most recent 12 months, with 15 experiences reported during the last three month period.

Company Snapshot	Creditworthiness	Payment History & Trends	Public Filings	History & Operations	Banking & Finance
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Public Filings

Summary of Court Actions

The following data includes both open and closed filings found in D&B's database on the subject company.

Record Type	Open Records	Open Value	Total Records	Most Recent Filing Date
Suits	0	0	0	-
Liens	0	0	0	-
Judgments	0	0	0	-
UCC Filings	10	N/A	16	10/08/2009
Bankruptcy Proceedings	0	N/A	0	-

Public filing data is for informational purposes only and is not the official record. Certified copies can only be obtained from the official source. Number and value of open records refers only to 10 most recent filings for each record type. There are additional suits, liens, judgments, or UCC filings in D&B's file on this company available by contacting 1-866-472-7362.

Special Events

10/02/2009 SEPTEMBER 2009 GEORGIA FLOODING: The effects of flooding in Georgia impacted the county in which this business operates. This business may have experienced impact to its operations as a result of this event.

UCC Filings

Collateral	Type	Sec. Party	Debtor	Date Filed	Additional Details
Computer equipment	Original	ELECTRO-GRAPHIC PRODUCTS, INC., CEDAR RAPIDS, IA	PATIENT SATISFACTION PLUS, LLC	01/26/2007	Filing number: 00707001827 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA

					Latest info Received: 02/20/2007
Unavailable	Original	DELL FINANCIAL SERVICES L.L.C., AUSTIN, TX	PATIENT SATISFACTION PLUS, LLC	10/08/2009	Filing number: 00709018356 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 11/17/2009
Unavailable	Original	DELL FINANCIAL SERVICES L.L.C., AUSTIN, TX	PATIENT SATISFACTION PLUS, LLC	09/24/2009	Filing number: 00709017443 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 10/06/2009
Unavailable	Original	ELECTRO-GRAPHIC PRODUCTS, INC., CEDAR RAPIDS, IA	PATIENT SATISFACTION PLUS, LLC	07/28/2009	Filing number: 00709013879 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 08/08/2009
Unavailable	Original	RBC BANK (USA), BIRMINGHAM, AL	PATIENT SATISFACTION PLUS, LLC	06/25/2009	Filing number: 06709004771 Filed with: GWINNETT COUNTY SUPERIOR COURT CLERKS OFFICE, LAWRENCEVILLE, GA Latest info Received: 07/09/2009
Unavailable	Original	DELL FINANCIAL SERVICES L.L.C., AUSTIN, TX	PATIENT SATISFACTION PLUS, LLC	03/05/2009	Filing number: 00709003827 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 04/08/2009
Unavailable	Original	US EXPRESS LEASING, INC., PARSIPPANY, NJ	PATIENT SATISFACTION PLUS, LLC	11/24/2008	Filing number: 00708024560 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 12/08/2008
Unavailable	Original	DELL FINANCIAL SERVICES L.L.C., AUSTIN, TX	PATIENT SATISFACTION PLUS, LLC	10/23/2008	Filing number: 03308010914 Filed with: COBB COUNTY SUPERIOR COURT, MARIETTA, GA Latest info Received: 11/10/2008
Unavailable	Original	US EXPRESS LEASING, INC., PARSIPPANY, NJ	PATIENT SATISFACTION PLUS, LLC	01/23/2008	Filing number: 00708001520 Filed with: BARROW COUNTY SUPERIOR COURT CLERKS OFFICE, WINDER, GA Latest info Received: 02/12/2008
Unavailable	Original	INTER-TEL LEASING INC., HOUSTON, TX	PATIENT SATISFACTION PLUS, LLC	01/07/2008	Filing number: 06008000260 Filed with: FULTON COUNTY SUPERIOR COURT CLERKS OFFICE, ATLANTA, GA Latest info Received: 02/12/2008

The public record items contained in this report may have been paid, terminated, vacated or released prior to the date this report was printed. There are additional suits, liens, judgments, or UCC filings in D&B's file on this company available by contacting 1-866-472-7362. Any public filings displayed in red are open.

Government Activity

Activity Summary		Possible Candidate for Socio-Economic Program Consideration	
Borrower (Dir/Guar)	No	Labor Surplus Area	N/A
Administrative Debt	No	Small Business	N/A
Contractor	No	8(A) Firm	N/A
Grantee	No		
Party Excluded from Federal Program(s)	No		

The details provided in the Government Activity section are as reported to D&B by the federal government and other sources.

History & Operations

Topic	Description
History	Detailed information on the history of a company, including background information on the management team and key principals, and information on related companies.
Registration & Incorporation	Detailed registration and incorporation information, including the date and state of incorporation and the type of corporation formed.
Company Operations	Detailed information on a company's operations, including the identity of the parent company, the geographic scope of the business, and the key holdings.
Industry Classification	Details on the specific industry within which a company is classified.

History

Management:
AC MYERS, CEO

This is a Limited Liability Company formed in Georgia on August 11, 1995.

Business started 1995.

AC MYERS. 1995-present active here.

Registration & Incorporation

Registered Name:	Patient satisfaction plus, llc	Filing Date:	August 11, 1995
Business Type:	Limited liability company	Registration ID:	K525070
State of incorporation:	Georgia	Where filed:	SECRETARY OF STATE/BUSINESS SERVICES AND REGULATIONS/CORPORATE DIVISION, ATLANTA, GA
Duration :	Perpetual	Registered Agent:	A C MYERS III, 1965 Evergreen Blvd.;Suite 100, Duluth, GA, 300960000
Status:	Active/compliance		

Corporate and business registrations provided by management or other source.

Company Operations

Description:	Engaged in commercial nonphysical research services (100%).
	Terms are net 30 days. Terms are net 30 days. Sells to commercial concerns.
	Nonseasonal.
Employees:	58 which includes partners.
Facilities:	Rents 18,603 sq. ft. in 1 story brick building.

Industry Classification

SIC		NAICS	
87320000	Commercial nonphysical research	541910	Marketing Research and Public Opinion Polling

Based on information in our file, D&B has assigned this company an extended 8-digit SIC. D&B's use of 8-digit SICs enables us to be more specific to a company's operations than if we use the standard 4-digit code.

The 4-digit SIC numbers link to the description on the Occupational Safety & Health Administration (OSHA) Web site. Links open in a new browser window.

[Company Snapshot](#) | [Creditworthiness](#) | [Payment History & Trends](#) | [Public Filings](#) | [History & Operations](#) | [Banking & Finance](#)

Banking & Finance

Key Business Ratios

Statement date: Dec 31 2008

Industry Norms based on 25 establishments			
	This Business	Industry Median	Industry Quartile
Profitability			
Return on Sales	5.9	3.5	1
Return on Net Worth	(-)	23.6	4
Short-Term Solvency			
Current Ratio	0.7	2.0	4
Quick Ratio	0.5	1.5	4
Efficiency			
Assets Sales	21.4	30.1	1
Sales / Net Working Capital	(15.2)	7.3	4
Utilization			
Total Liabilities / Net Worth	(-)	66.3	4

(-) = Ratio not calculated due to negative number

Finance

09/18/2009

Three-year statement comparative:

	Fiscal Dec 31 2006	Fiscal Dec 31 2007	Fiscal Dec 31 2008
Current Assets	1,204,862	1,484,477	1,297,312
Current Liabs	1,920,256	2,049,210	1,939,655
Current Ratio	0.63	0.72	0.67
Working Capital	(715,394)	(564,733)	(642,343)
Other Assets	577,614	720,370	783,441
Net Worth	(391,740)	(874,242)	(747,165)
Sales	6,308,339	8,638,199	9,738,582
Long Term Liab	253,960	1,029,879	888,263
Net Profit (Loss)	333,568	514,638	574,152

Fiscal statement dated DEC 31 2008:

Assets		Liabilities	
Cash	5,514	Accts pay	153,944
Accts rec	1,017,960	Capital lease obligations	40,061
Notes rec	24,247	Accruals	314,562
Unbilled revenue	248,101	L.t. liab-(1yr)	175,040
Other curr assets	1,490	Advance under line of credit	375,000
		Billings in excess of costs	881,048
Current Assets	\$1,297,312	Current Liabilities	\$1,939,655

Fixt & equip	567,514	Long-term debt-net	677,762
Notes receivable-member-net	120,387	Capital lease obligations-net	84,560
Csv of life ins.	66,387	L.t. liab-other	125,941
Other assets	29,153	Members equity	(747,165)
Total Assets	\$2,080,753	Total Liabilities	\$2,080,753

From JAN 01 2008 to DEC 31 2008 annual sales \$9,738,582. Gross profit \$9,738,582; operating expenses \$9,088,028. Operating income \$650,554; other income \$15,235; other expenses \$91,637. Net income \$574,152.

Prepared from statement(s) by Accountant: Carmichael, Brasher, Tuvell & Company, P.C., Atlanta, Georgia.

Accountant's Opinion

The financial statement as submitted by the subject company was reviewed by the accountant.

Fixed assets shown net less \$361,527 depreciation.

On September 18, 2009, the financial information was updated.

Company Snapshot	Creditworthiness	Payment History & Trends	Public Filings	History & Operations	Banking & Finance
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