

Resolution # 18-1

WHEREAS, it is a primary concern of Sangamon County that injured workers receive quality medical care and rehabilitation, as needed, to enable their recovery and expeditious return to the work environment; and

WHEREAS, in 2006 the County implemented a comprehensive medical case management program for workers' compensation which not only has been successful in ensuring that workers who are injured in the performance of their duties receive quality medical care and rehabilitation, but also has proven to be an effective method for managing the County's workers' compensation costs and time lost from work; and

WHEREAS, the County annually receives a grant of approximately \$75,000 per year from the Illinois Public Risk Fund (IPRF) to offset our costs for providing a comprehensive medical case management program; and

WHEREAS, in September 2011 the County and the City of Springfield issued a joint Request For Proposals (RFP) for medical case management services to ensure that such services were procured in a cost effective manner; and

WHEREAS, Disability Management Network, Ltd., an Illinois Corporation, d/b/a Triune Health Group, Ltd. (hereinafter referred to as "Triune") submitted the lowest responsible proposal to provide medical case management services for the County's employees in an amount not to exceed \$159,252(\$79,626 per year) for the time period of January 1, 2012, through December 31, 2013, with a one year option to renew, a copy of which is attached hereto and marked as Exhibit 1; and

WHEREAS, the acceptance of Triune's proposal would reduce the County's current expenses for medical case management services by approximately \$110,374 per year.

NOW, THEREFORE, BE IT RESOLVED that the Sangamon County Board, in session this 13th day of December, 2011, hereby authorizes the execution of a two year contract with Triune for comprehensive medical case management services for employees who are injured in the performance of their job duties. The period of this contract shall be January 1, 2012 through December 31, 2013, with an option to renew for one year, and the amount of the contract shall be \$159,626. The County Administrator and County Auditor are authorized to execute this agreement.

**FILED**

DEC 09 2011

*Joe Aiello*  
Sangamon County Clerk

**RECEIVED**

DEC 02 2011

Paul Palazzolo  
SANGAMON COUNTY AUDITOR

Submitted By

Employee Services Committee

Paul M, Chairman \_\_\_\_\_, Member

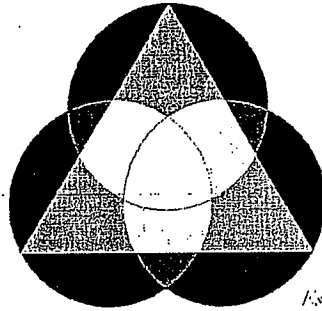
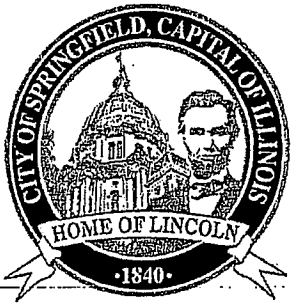
Tom E. Hill, Member \_\_\_\_\_, Member

Sarah Musgrave, Member \_\_\_\_\_, Member

John Fulgenzi, Member \_\_\_\_\_, Member

\_\_\_\_\_, Member \_\_\_\_\_, Member

\_\_\_\_\_, Member \_\_\_\_\_, Member



Est. 1990

**TRIUNE**  
HEALTH GROUP



# Workers Compensation Case Management Review

Proposal #CC12-09

Submitted to:

City of Springfield  
City Purchasing Agent  
Room 200 Municipal Center, West  
300 South Seventh Street  
Springfield, IL 62701-1681

CC:

Christopher J. Yep, President  
MaryAnne Yep, Vice President  
TRIUNE Health Group



**EXHIBIT 1**



**Table of Contents:**

A. Executive Summary	3
B. Corporate Governance	4-5
C. Business Model	6-7
D. RFP Response Requirements	8
1. Case Management Services Plan	9-12
2. Public Entity Work in Illinois	13-14
3. Client References	15
4. Current/Past Litigation	16
5. Curriculum Vitae of Key Personnel	17-22
6. Job Descriptions & New Hire Qualifications	23-24
7. Cost Containment Strategies	25
8. Pricing Proposal	26
E. Confidentiality Agreement	27
F. Appendices	28
a. RFP #CC12-09 Addendum #2	



## Executive Summary

Greetings!

As an Illinois owned and operated company, no one cares for Illinois workers better than us here at TRIUNE Health Group. Twenty-one years ago, our company was founded with the philosophy that caring for each individual we served and treating them with dignity and respect would make us truly unique in this world today. Every person of every customer we serve deserves the best we can offer; the best service, the best attention, the best possible outcomes. Our mission of 'People helping people' is a constant reminder that excellence comes from the dedication and experience of our people helping each of you.

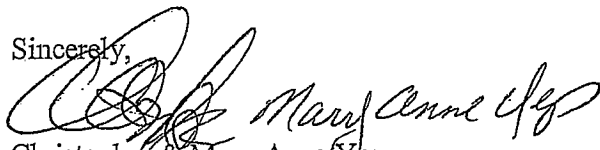
We have expanded throughout this great state of Illinois, the land of Abraham Lincoln, by finding the best professionals, asking them to join our team, and then providing them with the tools they need to do their job better than anyone else. Sometimes these tools are technological, which is why we earned a reputation for innovation even in the Worker's Compensation market, and sometimes these tools comprise intellectual or human training which is why they voted us one of the Top 20 Places to Work in 2010 Crain's Business.

We are experts at solving problems and will do whatever it takes to make sure you, and all the employees of the City of Springfield and Sangamon County are well cared for. After all, even more than a company of experts, we are a company of People Helping People and we are grateful for all that you do. You, like us, are Illinois people serving other Illinois people. You know what it means to speak about the 'land of Lincoln' with pride and honor in the forefather who bore that name.

As the largest employer in Sangamon County IL, the County Government seeks to provide the best quality service to its people who are in turn providing service to the individual members of the county it serves. And as members of the City of Springfield, IL, you also know that there 'really IS only one Springfield that anyone should care about', and its Springfield, Illinois. That's why TRIUNE Health Group is such a fit.

Given the chance to work with you, in caring for the health and injuries of all the employees of the City of Springfield and Sangamon County, we are confident that you will find all the best quality and attention that a family owned and operated, Illinois company, has to offer. We are proud of the opportunity to bid on the project and look forward to hearing what you would like our next steps to be.

Sincerely,

  
Christopher & Mary Anne Yep  
President Vice-President



**Corporate Governance**

**Articles of Incorporation:**

TRIUNE Health Group Ltd, is a privately held for-profit corporation, incorporated in the State of Illinois.

**Board of Directors & Advisors:**

Currently there is a team of individuals who share this status without an official arrangement with the Executive Team of TRIUNE Health Group. Their role is to provide expertise along with strategic thinking. As such, the Board of Directors serves our corporation by monitoring internal policies and procedures, and advising the direction of the corporation towards the ends which have hereto been stated, id est, the best interests of its stakeholders with a sense of qualified business acumen, objectivity, accountability, and integrity.

**Directors & Officers:**

President & Chief Executive Officer	Christopher J. Yep
Vice President & Chief Personnel Officer	MaryAnne Yep
Chief Operations Officer	James J. Yep
Director Business & Financial Development	Thomas G. Yep
Director, Finance	Joshua Brown
Director, Sales & Marketing	Allison Hanson

**Management Team:**

Manager, Medical Case Management	James J. Yep
Manager, Strategic Initiatives	Nathen Larsen
Manager, Vocational Rehabilitation	Stephen Sprauer
Human Resources	Kyle Dardis

**History at a Glance:**

TRIUNE Health Group first became a reality on October 7, 1990 with the formation of Disability Management Network in Rockford Illinois. Based on a reputation of honesty, fairness, and results, TRIUNE Health Group grew quickly. Beginning as a provider of Vocational and Medical Management Services, the company now offers a variety of products and solutions to prevent injuries and illnesses, as well as maintain and regain employee health.

In reaching its fifth major expansion, the company introduced its multifaceted approach to Health and Productivity by providing programs to meet the needs of the total person. With this enhanced approach to solving the needs of employers, a new company identity was introduced. Thus, on October 7, 2007, 17 years after its beginning, Disability Management Network became TRIUNE Health Group.



On October 7, 2010, TRIUNE Health Group reached a new milestone: 20 years of People Helping People.

Now in our 21<sup>st</sup> year, the vision and geography of TRIUNE Health Group continues to expand. Growing from a local injury management company which started 20 years ago, TRIUNE Health Group now reaches out nationally with the goal of restoration of the human person--physically, emotionally, and even spiritually--thus allowing for the strengthening of our very culture.

Now serving 37 states, TRIUNE Health Group does this by providing services that will ultimately build stronger companies by building healthier individuals.



## Business Model

TRIUNE Health Group continues to lead the industry with innovative solutions relating to all the needs of employee health, from Worker's Comp to Major Medical. Escalating workers' compensation and healthcare costs being placed on Employers demands solutions from providers such as TRIUNE Health Group to manage the total continuum of employer-employee related health care costs.

TRIUNE Health Group offers professionals and expert services that reduce workers' compensation costs through proactive medical treatment plans and return to work programs – all advocating care for injured employees. Our proprietary solutions are tailored to each customer's specific risk management program.

Our team manages total health care costs while providing industry-leading service. We offer the flexibility of a local solution with the resources of a world class institution. Our suite of services is ideal for employers who are looking for an effective way to control all employee health related costs because our health benefit solutions allow you to serve your employees while managing the cost of health care effectively. We offer an extensive variety of products for large, medium and small businesses including, employee health benefit plans and value-added services that can be tailored to meet your organization's specific needs.

Customized solutions are the foundation of TRIUNE Health Group comprehensive integrated solution for employers of all sizes to manage their total employee health care related costs.

### *Worker's Compensation Solutions:*

- Medical Case Management
- Telephonic Case Management
- 24/7 Triage
- Integrated Disability
- Medicare Set-Asides
- Utilization Review
- Vocational Rehabilitation
- Bill Auditing & Bill Review
- Occupational Health
- Employee Assistance

### *Major Medical Solutions:*

- Health & Wellness
- Health Risk Assessments
- 24/7 Triage
- Integrated Disability
- Disease Management
- Lifestyle Management
- Personal Self-Care Plan
- Executive Coaching
- Employee Assistance
- Flu Shot Clinics

We are experts in Health Care Management. Our staff works diligently to reduce the number of injuries, improve Health and Wellness, and lower the costs for Healthcare and Workers' Compensation. We help people recover more quickly from injuries and illness and restore their ability to return to work, we find people jobs. We help companies succeed by improving productivity and efficiency creating happier work places and improving life balance. TRIUNE Health Group is a mission-driven company whose success comes from improving the lives and business of each person with whom we work.





Employers report an increase in employee performance working with TRIUNE Health Group.

- "I wish all of my patients had the benefit of a nurse from this company."
- "I never thought I would be able to work again."

**Representative List of Current Client Portfolio\*:**

Accident Fund	City of Chicago - Police/Fire	Pekin Insurance Company
Acuity Insurance	CNA Global	QBE Americas
Advocate Lutheran General Hospital	Country Mutual Insurance	Safeco Industries
AIG Claim Services, Inc.	Crum and Forster	Secura Insurance
Allstate	EMC Insurance	Sedgwick Claims Management
American Country Insurance	Employers	Sentry Insurance
Amerisure	ESIS	Society Insurance
Archer Daniels	Gallagher Bassett Services, Inc.	Specialty Risk Services
Argo Group	General Casualty Insurance	St. Paul Traveler
Auto Owners Insurance	Grange Insurance	State Farm Insurance
Badger Mutual	Hartford	SwedishAmerican Hospital
Berkley Risk Administrators Company	Hyatt Regency O'Hare	Tower Group Companies
Broadspire	IHA	Travelers Insurance
Catholic Mutual Group	IPRF	U.S. Department of Labor
CCMSI	IRMA	United Fire & Casualty
CHA	Indiana Insurance	United Heartland
Chartis Insurance	Lake Forest Hospital	University of Illinois
Chicago Bears	Liberty Mutual Insurance Company	Wausau Insurance
Chicago Tribune	Midwest Insurance Company	West Bend Mutual Insurance
Chubb Insurance	National Specialty Insurance	XChanging
Church Mutual Insurance	Nestle Purina PetCare	YMCA
Cincinnati Insurance	Nordstrom, Inc.	York Claims Service, Inc.
City of Chicago	NovaPro Risk Solutions, LP	Zurich N.A.

\*Current portfolio of clients includes approximately 600 entities.



## RFP Response Requirements

1. Case Management Services Plan
2. Public Entity Work in Illinois
3. Client References
4. Current/Past Litigation
5. Curriculum Vitae of Key Personnel
6. Job descriptions & New Hire Qualifications
7. Cost Containment Suggestions
8. Pricing Proposal



## Case Management Services Plan

It can happen to any employee and even one of us, at any time, and without warning. An unexpected accident or a disabling illness. For either, we are suddenly thrown into a world of uncertainty, with little knowledge of what to do or how to get out.

You can trust our nurses to lead you through.

What separates our expert Medical Case Management staff from others is the fact that we do it right the first time. Knowledge, dedication, commitment, reputation, and ethics all combine to help the injured and disabled individual return to a productive lifestyle.

Our nurses are known and respected in the industry for their quality, expertise and results-oriented approach to case management. Our presence is not only welcomed by medical professionals but often sought out to build a team dedicated to recovery. We get results.

A disability is costly. Measured in terms of a disrupted life, lost productivity, and medical expenses, effective case management changes this. By reducing the impact of the injury, we reduce costs. Our nurses specialize in caring for short and long term needs, for surgical and non-surgical injuries, from the frustratingly simple to the most catastrophic of injuries, we work hard to make a difference.

## Service Model for the City of Springfield, IL and Sangamon County, IL

### *Reporting Protocol:*

TRIUNE Health Group leads the industry in Medical Case Management, and so each of the core customer expectations which include:

- Immediate email updates following each provider visit
- Weekly summary reports of each open claim
- Attendance at monthly safety meetings
- Quarterly Summary Report
- Quarterly File Reviews of each injured individual

...are already metrics and aspects the internal reporting guidelines with which we serve each of our customers.

### *Educational Tools:*

TRIUNE Health Group's corporate mission to our customers is to collaborate collectively on all areas of industry trends compared with our customers personal risk management and cost containment strategies. It is our belief that as our customer relationships develop that we become an intrinsic part of their management group in identifying creative and new approaches. This aids in reducing the global liability for the customer and keeping them on the front edge of the industry, while educating each team member on the ethical and clear comparative choices each customer may have.



Our client based educational tools are chosen and developed based on the individual customer's needs and adapted to their workforce for effective training and implementation. Past educational offerings have included, but are not limited to:

- *Loss Run Analysis with targeted training programs*
- *Illinois Workers Comp 101*
- *The Top Ten Ways An Employer Can Screw Up A Claim*
- *Factors to Consider in Trial V. Settlement In A Worker's Compensation Claim*
- *Blood Borne Pathogens*
- *Hearing Conservation*
- *Multicultural Issues Surrounding Workers' Compensation Claims*
- *Accommodating Temporary Work Restrictions*
- *Male Health Topics*
- *Female Health Topics*
- *Wellness Initiatives*
- *Ouch! Our WC Injuries Really Hurt! But They Don't Have To...*
- *Cost's of a Workers Compensation Claim (employee or managers)*
- *Targeting Your Injuries in a Wellness Safety Program*
- *Lifting Techniques*
- *Back and Spine Injuries*
- *Repetitive Trauma Injuries*
- *FMLA/LOA*
- *Short Term Disability*
- *Integrating Group Medical and Workers Compensation Programs.*
- *Employee Medical Accountability*
- *Identifying Cost Savings in a Medical Claim*
- *Identifying the ROI in Workers Compensation Claims*
- *Lunch and Learns on Any Medical Diagnosis Group*
- *Bill Auditing and Bill Review Industry Changes*

*Medical Case Management Activity:*

Components of the Program include but are not limited to:

- Medical Nurse Case Management
- Task Assignments
- Vocational / Ergonomic Job Analysis
- Utilization Review Utilization Management
- Bill Auditing Bill Re-pricing Service Platform
- Specialty Network Accessibility
- PPO/PPP Directed Provider Care Network Access

Standard Goals of TRIUNE Health Group's Medical Case Management Team

- Identify appropriate medical case management interventions.
- Facilitate timely RTW.
- Facilitate appropriate timely treatment.
- Facilitate injured worker treatment compliance.
- Assist in Setting accurate reserves and identifying potential risks.
- Decrease Direct and Indirect Workers Compensation Costs.
- Identify Alternative Cost Containment Services and Access



### *New Case Referrals Medical Management Processes*

1. New Case Referral and intake, with initial assessment completed within 48 – 72 hrs.
2. HIPAA forms (Medical Records Authorization and Privacy Notice) sent within 24 hrs.
3. Request and review available medical records (Confirm completion of HIPAA form).
4. Contact injured worker timely to assess current health status, treatment compliance and return to work opportunities.
5. Complete *One Touch* with each client weekly (One Touch is a proprietary personal contact with each client minimally each week to ensure proactive management)
6. Contact Health Care Providers timely
  - a) Confirm diagnosis and current health status
  - b) Obtain current treatment plan and medical records.
  - c) Coordinate rehabilitation and return to work plan.
7. Utilize MDA guidelines and provide Estimated Length of Disability (ELOD) to employer and account.
8. Assess the need for second opinion or Independent Medical Evaluation (IME).
9. Evaluate the need for Field Case Management (FCM) appointments to be attended, assess appropriateness and set outcomes of each attendance with goals defined.
10. Communicate timely with Employee, Employee/supervisor and Claim Adjuster (in compliance with account specific special handling instructions).
11. Proprietary Triune Return to Work (RTW) Status forms or customer specific forms will be utilized when requesting health status and return to work progress information.
12. Proprietary Triune Employer Job Description will be utilized to facilitate RTW unless furnished by customer.
13. Coordinate TASK assignments of other cost reduction services like Utilization Review, Vocational rehabilitation, catastrophic management, bill auditing bill review, Medicare Set Aside Agreements (MSA's), specialty networks or PPO/PPP provider initiatives with customer and claim adjusters as needed.
14. Maintain ongoing communication with Employee, Employer and Medical Providers to facilitate a timely RTW and successful rehabilitation.



15. Provide Estimated Length of Disability (ELOD) and target RTW updates with and without restrictions.
16. Manage return to work restrictions and Light Duty employer availability with customer and management staff.
17. Complete 30 day reviews with claim adjuster to determine the need for ongoing 30 days of field case management.
18. Field Case Management Reports
  - a) TCM Initial Report completed within 48 to 72 hours.
  - b) Triune confidential Email Alerts sent as determined by case management activity and special customer expectations.
  - c) Triune confidential Email Alerts sent on all TCM Case Management file closures.
  - d) RTW Status Reports sent to adjuster with access to Life Touch Documents.
19. Life Touch Data base access: Access to Nurse TCM Notes and Documents with view capabilities.
20. Quarterly Outcome Reports (as specified by account).



Public Entity Work in Illinois

Institution Name	Website	Service Capacity	Years of Service
Village of Jerome	<a href="http://www.villageofjerome.com/">www.villageofjerome.com/</a>	Medical Case Management, Field	2
Village of Barry	<a href="http://www.barryil.org/">www.barryil.org/</a>	Medical Case Management, Field	2
Illinois Public Risk Fund	<a href="http://www.iprf.com/">www.iprf.com/</a>	Medical Case Management, Field & Telephonic, Utilization Review, Vocational Rehabilitation	7
Illinois Hospital Association	<a href="http://www.ihatoday.org/">www.ihatoday.org/</a>	Medical Case Management, Field & Telephonic Utilization Review, Vocational Rehabilitation	6
Illinois Risk Management Association	<a href="http://www.irmarisk.org/">www.irmarisk.org/</a>	Medical Case Management, Field & Telephonic Utilization Review, Vocational Rehabilitation	7
Rockford Board of Education	<a href="http://www.rockfordschools.org/">www.rockfordschools.org/</a>	Medical Case Management, Field & Telephonic Utilization Review, Vocational Rehabilitation Corporate Wellness	12
Rockford School District	<a href="http://www2.rps205.com/">www2.rps205.com/</a>	Medical Case Management, Field & Telephonic Vocational Rehabilitation	12
University of Illinois	<a href="http://illinois.edu/">http://illinois.edu/</a>	Medical Case Management, Field & Telephonic Vocational Rehabilitation	2
Park District Risk Management Association	<a href="http://www.pdrma.org">www.pdrma.org</a>	Medical Case Management, Field & Telephonic, Vocational Rehabilitation	4
Cook County	<a href="http://blog.cookcountygov.com/">blog.cookcountygov.com/</a>	Medical Case Management, Field & Telephonic	5
City of Chicago	<a href="http://www.cityofchicago.org">www.cityofchicago.org</a>	Medical Case Management, Field & Telephonic Vocational Rehabilitation	10
City of Chicago Police/Fire	<a href="http://www.cityofchicago.org">www.cityofchicago.org</a>	Medical Case Management, Field & Telephonic Vocational Rehabilitation	10



<b>Chicago Park District</b>	<a href="http://www.chicagoparkdistrict.com/">www.chicagoparkdistrict.com/</a>	Medical Case Management, Field & Telephonic	5
<b>Chicago Housing Authority</b>	<a href="http://www.thecha.org/">www.thecha.org/</a>	Medical Case Management, Field & Telephonic	5
<b>Social Security Administration</b>	<a href="http://www.ssa.gov">www.ssa.gov</a>	Medical Case Management, Field & Telephonic Vocational Rehabilitation	20





## Client References

Please find listed business professionals who currently are being served by TRIUNE Health Group and whom have volunteered to speak with you regarding the superior quality and success which they have experienced through their relationship with our company.

### **Denise Knoblauch RN BSN COHN-S/CM**

OSF St. Francis Hospital, Peoria IL  
Clinical Case Manager/Ambulatory Lead Green Belt  
Center for Occupational Health  
Phone: 309-624-4717 (COH)  
Phone: 309-624-2230  
Fax: 309-624-4713

### **The Village of Jerome**

Robyn O'Dell, CCMSI  
1815 S. Main  
Eureka IL 61530  
Telephone: (309) 620-8337  
Fax: 217 444 2779  
E mail: rodell@ccmsi.com

### **The City of Barry**

Robyn O'Dell, CCMSI  
1815 S. Main  
Eureka IL 61530  
Telephone: (309) 620-8337  
Fax: 217 444 2779  
E mail: rodell@ccmsi.com

### **Cindy Thompson, Director, Compensation & Benefit Services**

Swedish American Health System  
Rockford IL 61114  
E-Mail: cthompson@swedishamerican.org  
Phone: (815) 489-4657

### **Jennie Lindstrom**

Rockford Public Schools  
Disability Specialist/Workers Compensation  
201 South Madison Street  
Rockford, IL 61104  
815.966.3908

If you should have any questions, or would like for us to take ownership of setting up an interview with them, please request it.



### Current/Past Litigation

There is no current or past employee and/or company affiliations involved with client investigation litigation or abuse to the Illinois Worker's Compensation System.



## Curriculum Vitae of Key Personnel

Christopher J. Yep MS, CRC, LCPC  
President and Chief Executive Officer

Christopher has over 30 years in the field of Vocational Rehabilitation Management. He completed a Masters Degree in Vocational Rehabilitation Counseling at the Illinois Institute of Technology and is currently a Certified Rehabilitation Counselor and a Licensed Professional Clinical Counselor. His experience includes managing multi-state operations for a national case management company as well as overseeing product development, quality of service, and marketing. Working in private rehabilitation for 20 years, Chris has also had experience as a Vocational Rehabilitation Consultant and as a Vocational Expert; certified by the Social Security Administration. Christopher is President and CEO of TRIUNE Health Group, LTD. He, and his wife of 38 years, Mary Anne, are co-owners of TRIUNE Health Group, LTD.

Mary Anne Yep BSN  
Vice President & Chief Personnel Officer

Mary Anne is a graduate of St. Xavier University, Chicago, Illinois, where she earned her Bachelor of Science Degree in Nursing. Her clinical experiences include medical-surgical, pediatrics, and labor and delivery at major Chicago area hospitals where she has held both staff and leadership positions. Mary Anne took a hiatus from nursing to raise her family of 10 children; 4 of which are now married, 2 who are studying for the Catholic priesthood, and 2 who are college students. Mary Anne and her husband Chris are also the proud grandparents of 13 grandchildren. Mary Anne has also served as an executive administrative assistant, and event planner for an international religious organization, in addition to serving as co-owner and Vice President for TRIUNE Health Group. Her current responsibilities include directing all personnel and professional development, as well as guiding administrative functions on a corporate level.

James J. Yep BA  
Chief Operating Officer

James is a graduate of Loras College in Dubuque, Iowa, where he earned a Bachelor of Arts Degree in Human Resource Management, and where he also served as President of the Student Chapter for the Society for Human Resource Managers. He worked for several years in Human Resource Management in an industrial setting, before joining TRIUNE Health Group in 1998. Soon, because of his natural ability in the Computer Sciences, James led a technology team in the development and implementation of TRIUNE Health Group's proprietary Case Management and Business Software program known as Life Touch. James was promoted to Manager of the Medical Department, as his extensive years of experience building the software applications that serve our nurses the best and make their job more efficient and easier to manage, positioned him to help our Case Managers become the medical and technological leaders in the industry. James also holds the title of Chief Operating Officer, which allows him to evaluate and advise the owners on all matters of service and customer relations.



Thomas G. Yep BA, MBA  
Director of Business and Financial Development

A graduate of the University of Dallas, Thomas earned a degree in Political Philosophy and International Studies. His areas of study includes international business, communications, and corporate law and he has spent time studying abroad. He is conversant in Spanish. Work experience includes several years working at the World Trade Center Chicago, where he served as Director of Corporate Marketing and International Communications, and special assistant to the Chairman. He was also responsible for the coordination and planning of key events for international dignitaries and business executives. Thomas earned his Masters in Business Administration from Loyola University Chicago and currently holds responsibilities for business development overseeing strategic marketing initiatives.



City of Springfield, IL and Sangamon County, IL Project Supervisor: **JODI MacEWAN**

## QUALIFICATIONS

- Many years experience in medical case management and workers' compensation.
- Provide proactive case management intervention with injured workers, insurance carriers, employers, and physicians with the goal of a timely return to work.
- Excellent communication, organizational, and analytical skills.
- Extremely knowledgeable in industry literature.

## PROFESSIONAL EXPERIENCE

**TRIUNE Health Group** Oak Brook, IL  
Nurse Case Manager, 2008 – Present

**Independent Medical Case Manager** Normal, IL  
Independent Medical Case Manager

- Provided field case and telephonic management services with proven success in identification and evaluation of delays in care with the goal of timely return to work.
- Worked closely with all parties involved in the medical case management of injured workers, including physicians, attorneys, and claim representatives with goals of timely return to work or identification of end of healing.
- Administrative responsibilities and billing.

**CHD Meridian Healthcare at Mitsubishi Motors of North America** Normal, IL  
Occupational Health Nurse

- Provided occupational and acute care with an element of workers' compensation case management.
- Promotion of corporate wellness and prevention initiatives.

**MMI of Illinois** Peoria, IL  
Field Case Manager

- Provided field case management of workers' compensation claims.
- Proactive intervention with all involved in the medical management of the individual with the ultimate goal of a successful return to work.

**Concentra Care Management Services** Jacksonville, FL  
Field Case Manager

- Provided field case management services on a per diem basis.
- Assisted staff with coverage and discussed file direction with the goal of successful and timely return to work for injured workers.

**S & H Medical Management Services, Inc.**  
Nursing Supervisor/Medical Case Manager



- Provided workers' compensation case management services.
- Promoted to Nursing Supervisor.
- Responsible for quality control of reports, letters and e-mails prepared by nursing staff.
- Conducted case staffing to ensure file movement towards goal of achieving maximum medical improvement and timely return to work progression.
- Additional responsibilities included participation in ongoing assessment and evaluation of staff to ensure policy and procedure compliance.

### **CorVel Corporation**

Field Case Manager

- Provided field case management services for workers' compensation claims.
- Worked with long-term disability and group health claims.

### **OSF, Inc. Medical Group**

Staff Nurse, Physician Office

- Provided professional nursing care in multi-physician group practice.
- Served as triage nurse
- Provided patient education.

### **Chestnut Health Systems**

Case Manager, Triage Counselor

- Provided telephone intakes and case management for Employee Assistance Program.
- Provided front line crisis counseling.

### **Addiction Recovery Center, Proctor Hospital**

Assistant Nursing Coordinator/Staff Nurse

- Staff Nurse on medical/surgical units.
- Promoted to Assistant Nursing Coordinator of Addiction Recovery Center.

## **EDUCATION**

- Bachelor of Science in Nursing (High Honors)  
University of Illinois, Springfield, IL
- Associates of Applied Science in Nursing  
Illinois Central College, East Peoria, IL

## **CERTIFICATIONS**

- Professional Registered Nurse, State of Illinois
- Professional Registered Nurse, State of Florida
- Certified Case Manager



*Sangamon County, IL Dedicated Registered Nurse (RN): ANGELA WILLIAMSON*

**QUALIFICATIONS**

- Many years experience as a Field Case Manager providing catastrophic, orthopedic, neurological and general rehabilitation case management.
- Provide cost effective medical interventions maximizing resources for optimal outcomes in recovery, rehabilitation, and return to work.
- Business Owner for 10 plus years managing catastrophic nurse case managers, financial affairs, and marketing.
- Provide assessment, planning, coordination, and implementation of a goal-directed case plan for injured workers.

**PROFESSIONAL EXPERIENCE**

**TRIUNE Health Group** Oak Brook, IL  
Nurse Case Manager, 2010 – Present

**Corvel**, St. Louis, MO  
Field Specialist I, 1992 – 1993  
• Nurse Case Manager

**CareAllies (Cigna Companies)**, Norcross, GA  
Complex Medical Case Manager, 2009 – 2010  
• Telephonic

**Intracorp (CIGNA Companies)**, Chicago, IL  
Field Specialist II, 1985 – 1992  
• Nurse Case Manager

**Intracorp (CIGNA Companies)**, Chicago, IL  
Field Specialist II, 2004 – 2009  
• Catastrophic Nurse Case Manager  
• Ergonomics Assessor  
• Certified Registered Rehabilitation Nurse

**Seminole Community Hospital**, Largo, FL  
Staff Nurse, Emergency Room and Intensive Care Unit, 1985

**MHMS, Inc.**, Petersburg, IL  
Owner, 1993 – 2005  
• Catastrophic Nurse Case Manager

**St. John's Hospital**, Springfield, IL  
Staff/Charge Nurse, Coronary Pulmonary Unit, 1981 – 1985  
Staff Nurse, Medical Surgical Unit, 1981

**Springfield Clinic**, Springfield, IL (Contract through MHMS, Inc.)  
Director of Case Management Development and Senior Marketing Coordinator for Occupational Medicine, 1998 – 1999  
• Catastrophic Nurse Case Manager

**Humana Hospital**, Pompano Beach, FL  
Staff Nurse, Intensive Care Unit, 1981  
• Travel Nurse

**Memorial Medical Center**, Springfield, IL  
Staff Nurse, Acute Psychiatric Unit, 1979 – 1981

**EDUCATION**

Registered Nurse, Illinois and Florida  
PMAH School of Nursing, Jacksonville, IL

**CERTIFICATIONS**

- Certified Case Manager
- Certified Registered Rehabilitation Nurse
- CPR/AED for professional Rescuer and Healthcare Provider
- Certified in ergonomics assessment (internal certification at former employer)



*City of Springfield, IL Dedicated Registered Nurse (RN) : At this time, TRIUNE Health Group will plan to hire an additional nurse according to the requirements of this RFP.*





## Job descriptions & New Hire Qualifications

*Job Title: Nurse Case Manager*

*Job Status: Exempt*

*Reports To: Manager of Medical Services*

*Supervisory Responsibilities: None*

### **I. Summary of Position:**

The Nurse Case Manager coordinates resources and creates flexible cost effective options for catastrophically or chronically ill or injured individuals to facilitate quality individualized holistic treatment goals, including timely return to work when appropriate.

### **II. Essential Duties and Responsibilities:**

- Provide medical case management to individuals through coordination with the patient, physicians, other health care providers, the employer and the referral source.
- Utilize the steps of Case Management to provide assessment, planning, implementation, evaluation and outcome of individual's progress.
- Evaluate individual treatment plan for appropriateness, medical necessity, and cost effectiveness.
- Facilitates care such as negotiating and coordinating the delivery of durable medical equipment and home health services.
- Assess rehabilitation facilities for appropriateness of care, facilitate transportation, and coordinates architectural assessment of patients home when required.
- Read extensively and stay current with medical terminology and the federal and state law relating to health care, Workers Compensation, ADA, HIPPA, FMLA, STD, LTD, SSDI, SSA.
- Utilize technology (computer, cell phone, fax and scanning machine) to prepare organized, timely reports while complying with safety rules and regulations in conjunction with HIPPA.
- Research medical and community resources for individuals with catastrophic or chronic diagnoses such as but not limited to AIDS, cancer, spinal cord injuries, diabetes, head injuries, back injuries, hand injuries, burns, etc
- Posses a valid driver's license with the ability to travel 90% of the time.
- Perform other duties as assigned.

### **III. Job Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty, satisfactorily. The requirements listed below are representative of the knowledge, skill, and or/ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **Skills and Abilities:**

- Proven leadership skills.
- Excellent verbal and written communication skills, including the ability to interact well with customers, and fellow employees via the phone, email, in-person, and formal presentations.
- Methodical in accomplishing job related goals.



- Strong analytical and organizational skills, including the ability to multitask with attention to detail.
- In-depth knowledge of multi-software packages, most notably Microsoft Office Suite (mainly Word, Excel, PowerPoint, Outlook) and the Internet.
- Maintain a friendly, professional attitude at all times.
- Exercise initiative and be solution oriented, while keeping Management up-to-date on current situations or opportunities.
- Dependability and adaptability.

**Education and Experience:**

- Graduate of an accredited school of nursing.
- Current RN licensure in the state of operation.
- Three or more years of recent clinical experience, preferably in the areas of trauma, psychology, emergency, orthopedics, rehabilitation, occupational health and neurology.

**Certificates, Licenses, Registrations:** While not mandatory, an individual with one or a combination of the following certifications is preferred: COHN, COHN-S, CCM, and CDMS.

**IV. Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical	Not Present	Occasional	Frequent
Sitting			X
Standing			X
Walking			X
Reaching			X
Handling			X
Fingering			X
Exert Force to 20lbs.		X	
Exert Force to 10lbs.			X
Talking			X
Hearing			X



## Cost Containment Strategies

### Managed Care:

- PPO/PPP Networks (Largest New PPP Provider Access)
- PBM Networks
- IME Networks
- Occupational Clinic Networks
- Bill Auditing (low fee per bill cost)
- Bill Review Re-pricing (Percentage of savings taken only below state fee schedules)
- Peer Reviews
- Specialty Networks
- Short Term Disability Program Management

### Medical Case Management

- Early Intervention
- Early Intervention Triage Management
- Telephonic Case Management
- Field Case Management
- Catastrophic Care Management
- Utilization Review Management
- Peer to Peer Reviews
- Pre-certifications
- Medical Treatment Guidelines
- Disease Management

### Vocational Rehabilitation

- Vocational Analysis
- Return to Work Programs
- Market Research/Employer Sampling
- Job Analysis/Ergonomic Assessments
- Vocational Impact Projections (VIP)
- Job Placement/Training Coordination
- Expert Testimony
- Consultation

### Risk Management

- Integrated Claims Handling
- Safety Programs
- Early Intervention Triage Management
- Preferred Occupational Provider Specialties
- Alternative Duty Programs
- Accident Investigation



## Pricing Proposal

TRIUNE Health Group has provided a quote for an initial term of 1 year, as requested specifically by the City of Springfield, IL and Sangamon County, IL RFP. The price is fixed for the first year and will cover all costs for the Workers Compensation Case Management Review.

One dedicated Nurse Case Manager for the City of Springfield  
One dedicated Nurse Case Manager for the City of Springfield  
One dedicated Nurse Case Manager Backup  
One Nurse Case Manager Supervisor

**\$265,418.00 USD**

TRIUNE Health Group's intention in submitting this proposal is to obtain a contractual agreement with the City of Springfield, IL and Sangamon County, IL to provide Worker's Compensation Case Management Review.

The contract term will be 2 (two) year contract with a one year extension.

The annual rate, quoted above, is fixed for the first two years of the contract with 4% increase to accommodate inflation applied to the one year extension.

The contract will be a annual flat fee inclusive of all costs:

The contract starting date will be December 1, 2011.

All other specific contractual terms will be negotiated before the final contract signing.



## Notice of Confidentiality

TRIUNE Health Group Ltd. is submitting this proposal specifically to assist the *City of Springfield, IL and Sangamon County, IL* in the evaluation of TRIUNE Health Group Ltd. Managed Care capabilities. It is our understanding that this proposal which contains confidential and proprietary information will be viewed only by the *City of Springfield, IL and Sangamon County, IL* for the purpose of such evaluation on a strict need to know basis only; and will not be shared with or used by any other individuals without the express written consent of TRIUNE Health Group Ltd.

Representatives of the *City of Springfield, IL and Sangamon County, IL* agree to hold in confidence any information obtained relating to the business of TRIUNE Health Group Ltd. and agree to instruct your employees to keep all information strictly confidential in the same manner in which you maintain your own confidential and proprietary information. Representatives of the *City of Springfield, IL and Sangamon County, IL* also agree to not directly or indirectly disclose to any other person, firm or corporation any of the information, including, but not limited to; customer information, personal information, sales and pricing information, training programs, materials manuals and procedures, systems methods, ideas, or processes of any product or service provided by TRIUNE Health Group Ltd. as described in our proposal.

Should the Representatives of the *City of Springfield, IL and Sangamon County, IL* disagree with our understanding relative to the sharing of information as contained in this document, please notify TRIUNE Health Group Ltd. and return the information prior to the initiation of furthering this process. TRIUNE Health Group Ltd. submission of this information to you is contingent on your agreement to maintain the confidentiality of such information and to use such information solely as provided in this Confidentiality Statement. Absence of contact with TRIUNE Health Group's staff will indicate full agreement with all aspects of this statement.

This proposal and any attachments affixed hereto and made a part hereto embodies the entire understanding between the Parties and supersedes all previous negotiations, representations, writings and agreements, written, or oral, with respect to the subject matter herein. Any term or conflicting terms or conditions contained in any other document pursuant to the subject matter herein are hereby abrogated. Representatives of the *City of Springfield, IL and Sangamon County, IL* agree with TRIUNE Health Group that this proposal shall not be altered, amended or modified, except in writing that is signed by an authorized representative of both Parties.



Appendices



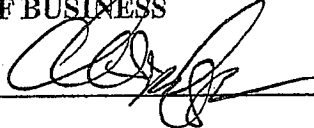
**ADDENDUM#2  
ACKNOWLEDGMENT**

Each bidder shall acknowledge receipt of this Addendum by their signature below and shall include a copy of this Addendum Acknowledgment Form at the front of Section III of the REQUEST FOR PROPOSAL. Failure to do so will be sufficient cause to reject your bid.

**CERTIFICATION BY BIDDER**

The undersigned acknowledges receipt of this Addendum and certifies that the bid submitted is in accordance with the information, instructions and stipulations set forth herein. The changes identified in this addendum take precedence over anything to the contrary in the original specifications or other addenda issued for this project. All other terms and conditions of the original specifications and previous addenda remain in full force and effect.

TRIUMPH HEALTH GROUP  
NAME OF BUSINESS

BY: 

TITLE: PRESIDENT  
(Title & Capacity of Person Signing)

DATE: 10/6/200

SECTION III

CERTIFICATIONS AND SIGNATURE OF BIDDER

Proposal No. RFP # CC12-09

Date: September 16, 2011

1. The undersigned bidder hereby declares that the only person or persons interested in the above proposal as principals are named herein and that no other person than herein mentioned has any interest in this proposal or in the contract to be entered into; that this proposal is made without connection with any other person, company or parties making a proposal; and that it is in all respects fair and in good faith without collusion or fraud.

2. The undersigned bidder certifies that it is not barred from bidding on any contract offered for bid by the State of Illinois or any unit of local government as result of a conviction for violating Sections 33E-33 or 33E-4 of the Illinois Criminal Code.

3. The undersigned hereby certifies that it is not delinquent in the payment of any tax administered by the Illinois Department of Revenue. If the undersigned bidder has entered into an agreement with the Department of Revenue for any taxes that are past due and is in compliance with that agreement, the bidder shall so state:

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4. The undersigned bidder certifies that it is not delinquent in the payment of any past due fines, sales tax, small claims or liens administered by the City of Springfield.

5. The undersigned bidder hereby declares and agrees to make and comply with the commitments to provide equal employment opportunity in accordance with the requirements contained in 6 (c) of this document.



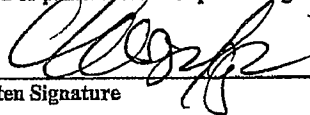
The undersigned bidder acknowledges and agrees that each of the certifications shall be incorporated into and made a part of the Invitation for Bids, Request for Proposals, Agreement, Contract, Amendment, Renewal or other similar documents to which these certifications are attached. Furthermore, the undersigned bidder certifies that they have read and understand the contents of this invitation and proposes offers and agrees that acceptance of this offer by signature of the Director of Office of Budget and Management will effectuate this agreement.

PURCHASER: CITY OF SPRINGFIELD

CONTRACTOR/BIDDER:

TRIONE HEALTH GROUP  
Name of business submitting this offer

CHRISTOPHER J YEP  
Typed or printed name of person signing

  
Written Signature

PRESIDENT  
Title

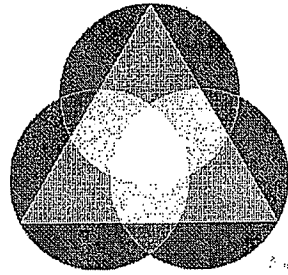
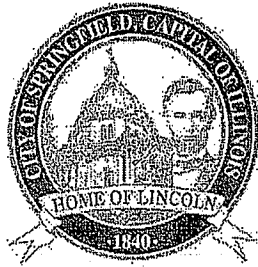
10/6/2011  
Date

1100 JDRIE BLVD SUITE 300  
Address

OLAK BROOK, IL 60523  
City/State/Zip

(800) 633 0884  
Phone

36-3838925  
Vendor's F.E.I.N. or Social Security Number



**TRIUNE**  
HEALTH GROUP

# Workers Compensation Case Management Review

Proposal #CC12-09  
FINAL Questions

Submitted to:

City of Springfield  
City Purchasing Agent  
Room 200 Municipal Center, West  
300 South Seventh Street  
Springfield, IL 62701-1681

CC

Christopher J. Yep, President  
Mary Anne Yep, Vice President  
TRIUNE Health Group





**Table of Contents:**

A. Executive Summary	3
B. Follow-Up Questions for Proposal CC12-09 Answers	4-12
a. Average Case Loads	4
b. Customer Dedication	4
c. Curriculum Vitae of Appropriate Personnel	5-8
d. A Team Approach	9
e. Local & Regional Awareness	9
f. Supervising the Project	9
g. Life of an Open File	9
h. Trial Experience	9
i. Addressing Existing Files	10
j. Access to Preferred Provider Networks	10
k. Service Plans	10
l. Injury Specific Service Plans	11-12
C. Confidentiality Agreement	13
D. Appendices	14-15
a. Follow-Up Questions for Proposal CC12-09	



## Executive Summary

Greetings!

As an Illinois owned and operated company, no one cares for Illinois workers better than us here at TRIUNE Health Group. Twenty-one years ago, our company was founded with the philosophy that caring for each individual we served and treating them with dignity and respect would make us truly unique in this world today. Every person from every customer we serve deserves the best we can offer; the best service, the best attention, the best possible outcomes. Our mission of "People Helping People" is a constant reminder that excellence comes from the dedication and experience of our people helping each of you.

We have expanded throughout this great state of Illinois, the land of Abraham Lincoln, by finding the best professionals, asking them to join our team, and then providing them with the tools they need to do their job better than anyone else. Sometimes these tools are technological, which is why we earned a reputation for innovation even in the Worker's Compensation market, and sometimes these tools comprise intellectual or human training which is why our own employees voted us one of the "Top 20 Places to Work" in 2010 Crain's Chicago Business.

We are experts at solving problems and will do whatever it takes to make sure you, and all the employees of the City of Springfield and Sangamon County are well cared for. After all, even more than a company of experts, we are a company of "People Helping People" and we are grateful for all that you do. You, like us, are Illinois people serving other Illinois people. You know what it means to speak about the "Land of Lincoln" with pride and honor in our forefather who bore that name.

As the largest employer in Sangamon County, Illinois, the county government seeks to provide the best quality service to its people who are in turn providing service to the individual members of the county it serves. And as members of the City of Springfield, Illinois, you also know that there 'really IS only one Springfield that anyone should care about', and it is Springfield, Illinois. That's why TRIUNE Health Group is such a complete fit.

Given the chance to work with you, in caring for the health and injuries of all the employees of the City of Springfield and Sangamon County, we are confident that you will find all the best quality and attention that a family owned and operated, Illinois company, has to offer. We are proud of the opportunity to bid on the project and look forward to hearing what you would like our next steps to be.

*To protect the anonymity of our second Sangamon County based Registered Nurse that we are presenting for your review; we have scrubbed her resume to protect her anonymity until she can give notice to her current employer after our company is awarded this contract.*

Sincerely,  
Christopher & Mary Anne Yep  
President Vice-President



### Average Case Loads

*Question 1. What is the average case load for your Nurse Case Managers (NCM)? What is the maximum?*

Here at TRIUNE Health Group, we work very hard to take care of our people as best as possible, because when our own people are well taken care of, they in turn have the freedom to focus on offering the best care possible to each of our customers. To that end, with regard to the average case load, there are a number of internal metrics in place to ensure Case Management quality as well as attention to our customers. Additionally, our Management team maintains close contact, on a regular basis with each Nurse Case Manager to speak about issues they may be facing in their day to day activities as well as how they are handling their individual case load. The Management team always takes into account nurse capability and skill, but we have found historically that the average case load at any given time is around 25 to 30 cases. These numbers vary depending on the complexity of the file and the individual attention that is needed.

### Customer Dedication

*Question 2. Will the NCM handle files for other employers? If yes, please discuss how this additional work will impact cases involving Springfield and Sangamon County employees.*

RFP #CC12-09 requested that this bid provide for a NCM team which is dedicated to serving the needs of the City of Springfield and Sangamon County employees, and therefore the NCM team will be dedicated to both as per the requests of the RFP. However, TRIUNE Health Group's charter is to constantly review the need of our clients to ensure that we are providing accurate, cost effective and quality driven products. To that end, our Management team will maintain an open and honest discussion that will continually address the quality and productivity needs of the contract. You will find that our philosophy of service is one which guarantees the highest level of integrity, and aligns itself as closely as possible, with the articulated needs of each customer. In the unlikely situation where our NCM team dedicated to this project would find themselves with idle time, our approach would be to discuss with you the possibility of offering them further responsibilities and proceed accordingly with appropriate prioritization of service as well as reduction in pricing.



### Curriculum Vitae of Appropriate Personnel

*Question 3. Please confirm the individuals you have designated to serve as primary and backup NCMs for Springfield and Sangamon County.*

*City of Springfield, IL and Sangamon County, IL Project Supervisor: Jodi MacEwan RN, CCM*

#### **QUALIFICATIONS**

- Team Leader for TRIUNE Health Group
- Many years experience in medical case management and workers' compensation.
- Provide proactive case management intervention with injured workers, insurance carriers, employers, and physicians with the goal of a timely return to work.
- Excellent communication, organizational, and analytical skills.
- Extremely knowledgeable in industry.

#### **PROFESSIONAL EXPERIENCE**

**TRIUNE Health Group** Oak Brook, IL  
Nurse Case Manager, 2008 – Present

Independent Medical Case Manager Normal, IL  
Independent Medical Case Manager

- Provided field case and telephonic management services with proven success in identification and evaluation of delays in care with the goal of timely return to work.
- Worked closely with all parties involved in the medical case management of injured workers, including physicians, attorneys, and claim representatives with goals of timely return to work or identification of end of healing.
- Administrative responsibilities and billing.

CHD Meridian Healthcare at Mitsubishi Motors of North America Normal, IL  
Occupational Health Nurse

- Provided occupational and acute care with an element of workers' compensation case management.
- Promotion of corporate wellness and prevention initiatives.

MMI of Illinois Peoria, IL  
Field Case Manager

- Provided field case management of workers' compensation claims.
- Proactive intervention with all involved in the medical management of the individual with the ultimate goal of a successful return to work.

Concentra Care Management Services Jacksonville, FL  
Field Case Manager

- Provided field case management services on a per diem basis.



- Assisted staff with coverage and discussed file direction with the goal of successful and timely return to work for injured workers.

#### **S & H Medical Management Services, Inc.**

Nursing Supervisor/Medical Case Manager

- Provided workers' compensation case management services.
- Promoted to Nursing Supervisor.
- Responsible for quality control of reports, letters and e-mails prepared by nursing staff.
- Conducted case staffing to ensure file movement towards goal of achieving maximum medical improvement and timely return to work progression.
- Additional responsibilities included participation in ongoing assessment and evaluation of staff to ensure policy and procedure compliance.

#### **CorVel Corporation**

Field Case Manager

- Provided field case management services for workers' compensation claims.
- Worked with long-term disability and group health claims.

#### **OSF, Inc. Medical Group**

Staff Nurse, Physician Office

- Provided professional nursing care in multi-physician group practice.
- Served as triage nurse
- Provided patient education.

#### **Chestnut Health Systems**

Case Manager, Triage Counselor

- Provided telephone intakes and case management for Employee Assistance Program.
- Provided front line crisis counseling.

#### **Addiction Recovery Center, Proctor Hospital**

Assistant Nursing Coordinator/Staff Nurse

- Staff Nurse on medical/surgical units.
- Promoted to Assistant Nursing Coordinator of Addiction Recovery Center.

#### **EDUCATION**

- Bachelor of Science in Nursing (High Honors)  
University of Illinois, Springfield, IL
- Associates of Applied Science in Nursing  
Illinois Central College, East Peoria, IL

#### **CERTIFICATIONS**

- Professional Registered Nurse, State of Illinois
- Certified Case Manager



*Sangamon County, IL Dedicated Registered Nurse (RN): Angela Williamson RN, CCM*

**QUALIFICATIONS**

- Many years experience as a Field Case Manager providing catastrophic, orthopedic, neurological and general rehabilitation case management.
- Provide cost effective medical interventions maximizing resources for optimal outcomes in recovery, rehabilitation, and return to work.
- Business Owner for 10 plus years managing catastrophic nurse case managers, financial affairs, and marketing.
- Provide assessment, planning, coordination, and implementation of a goal-directed case plan for injured workers.

**PROFESSIONAL EXPERIENCE**

**TRIUNE Health Group** Oak Brook, IL  
Nurse Case Manager, 2010 – Present

**CareAllies (Cigna Companies)**, Norcross, GA  
Complex Medical Case Manager, 2009 – 2010

- Telephonic

**Intracorp (CIGNA Companies)**, Chicago, IL  
Field Specialist II, 2004 – 2009

- Catastrophic Nurse Case Manager
- Ergonomics Assessor
- Certified Registered Rehabilitation Nurse

**MHMS, Inc.**, Petersburg, IL  
Owner, 1993 – 2005

- Catastrophic Nurse Case Manager

**Springfield Clinic**, Springfield, IL (Contract through MHMS, Inc.)  
Director of Case Management Development and Senior Marketing Coordinator for Occupational Medicine, 1998 – 1999

- Catastrophic Nurse Case Manager

**EDUCATION**

Registered Nurse, Illinois and Florida  
PMAH School of Nursing, Jacksonville, IL

**CERTIFICATIONS**

- Certified Case Manager
- Certified Registered Rehabilitation Nurse
- CPR/AED for professional Rescuer and Healthcare Provider
- Certified in ergonomics assessment (internal certification at former employer)

**Corvel**, St. Louis, MO  
Field Specialist I, 1992 – 1993

- Nurse Case Manager

**Intracorp (CIGNA Companies)**, Chicago, IL  
Field Specialist II, 1985 – 1992

- Nurse Case Manager

**Seminole Community Hospital**, Largo, FL  
Staff Nurse, Emergency Room and Intensive Care Unit, 1985

**St. John's Hospital**, Springfield, IL  
Staff/Charge Nurse, Coronary Pulmonary Unit, 1981 – 1985  
Staff Nurse, Medical Surgical Unit, 1981

**Humana Hospital**, Pompano Beach, FL  
Staff Nurse, Intensive Care Unit, 1981

- Travel Nurse

**Memorial Medical Center**, Springfield, IL  
Staff Nurse, Acute Psychiatric Unit, 1979 – 1981





*City of Springfield, IL Dedicated Registered Nurse (RN): Anonymous RN, CCM*

#### **QUALIFICATIONS**

- Associate Degree in Liberal Arts, The University of the State of New York, 1988
- Associate Degree in Nursing, Lincoln Land Community College, 1994
- Certified Case Manager
- Certified Life Care Planner

#### **PROFESSIONAL EXPERIENCE**

##### **Medical Case Manager, Current**

- Assist injured workers to reach their maximum rehabilitative potential
- Emphasize returning injured workers to pre-injury status safely and successfully as medically appropriate
- Coordinate services and communicate information between the injured worker, providers, employer and insurance carrier
- Provide medical case management services on long term disability cases

##### **Field Case Manager**

- Managed workers' compensation claims
- Provided case management and return to work coordination for injured workers
- Established contacts and resources in central Illinois area

##### **Field Case Manager**

- Managed workers compensation claims
- Provided case management and return to work coordination for injured workers
- Established contacts and resources in central Illinois area

##### **Staff Nurse**

- Concentrated work in Pain Clinic providing care to patients in chronic pain resulting from industrial accidents, motor vehicle accidents, and normal aging
- Rotated through Pre-Op, PACU, and Post-Op areas of surgical unit
- Assisted physicians during such procedures as epidural steroid injections, intrathecal narcotic injections, radiofrequency ablations, and trigger point injections
- Interrogated and reprogrammed implanted devices such as stimulators and intratecal pumps

##### **Occupational Health Nurse**

- Managed all aspects of one-person Occupational Health Clinic
- Provided on-site emergency first aid and triage for approximately 500 employees during maintenance outages at a coal-fired power station
- Conducted pre-employment urine drug screens for all incoming employees
- Coordinated with corporate Fitness for Duty Administrator in updating the current drug screening policy and procedure
- Utilized Access, Excel, and WordPerfect computer programs in data tracking, report writing, and statistical analysis

##### **Registered Nurse- Critical Care Unit**

- Performed, assessed and provided all nursing care services for critically ill patients
- Oriented and experienced in Emergency, Medical/Surgical, and Skilled Nursing Units



### **A Team Approach**

*Question 4. Who will serve as back up if both primary and secondary NCM are unavailable?*

In the unlikely event that neither our primary nor secondary NCM are available, the Team Leader, Jodi MacEwan RN, CCM will provide the seamless flow of service which the employees of the City of Springfield and Sangamon County will appreciate.

### **Local & Regional Awareness**

*Question 5. Please describe your NCM's familiarity and work history with medical providers in Sangamon County.*

Each of the NCMs we have proposed, have been directly working in the City of Springfield and Sangamon County area for over 10 years and possess a wide breadth of knowledge of many of the clinical providers, hospital networks, urgent care facilities and occupational clinics. They also have knowledge of employers and have worked with them to set up Occupational clinic relationships which are focused on the Return To Work (RTW) process.

### **Supervising the Project**

*Question 6. Where is the headquarters or location of the designated supervisor?*

Bloomington, Illinois

### **Life of an Open File**

*Question 7. Will Case Management continue to be "field case management" until the employee is returned to work?*

All lost time injuries will be opened as full field case management cases and managed as Field Case Management (FCM) cases, based upon the discretion of the NCM, Third Party Administrator (TPA) and the City of Springfield and Sangamon County representatives. FCM may be discontinued based upon either the Injured Workers (IW) RTW or reaching Maximum Medical Improvement (MMI). TRIUNE Health Group does have the ability to move cases into Telephonic Case Management (TCM) if agreed upon by the appropriate parties.

### **Trial Experience**

*Question 8. Please comment on how much experience your NCMs have in depositions and or testimony before an Arbitrator?*

With over 20 years experience in the Worker's Compensation arena in Illinois, our NCM's and Vocational Rehabilitation Counselors are the most advanced in their field and therefore possess the most experience in whatever legal needs their cases require. In the Workers' Compensation



industry we strive first to be the most quality driven, ethically based and bilaterally supportive liaison to our customers, patients, legal counsel and providers. This approach has historically mitigated the needs for our teams and our clients to be deposed for expert testimony. In those circumstances where deposition has been required, our employees are given training from our expert testimony specialists, Managers and legal council on an individual basis.

### Addressing Existing Files

*Question 9. What is the plan of action on existing open case files? Will all open files be reviewed and summarized or only problematic or lost time cases?*

Our experience proves that based upon the amount of open and existing claims, a case review would need to be completed on each file and a supplemental action plan would need to be completed following each of the file reviews. The file's future progression for continuation, task assignments, RTW objectives, case hold status or file closure would then be reviewed with all parties in agreement.

### Access to Preferred Provider Networks

*Question 10. Do you have access to more than one PPN?*

Yes. As an independent Worker's Compensation company, TRIUNE Health Group works to provide our employees with the support and freedom to choose the best providers available. Therefore, it has, and will always be, a part of TRIUNE Health Group's operating philosophy to work to bring the best medical providers to each case and ensure that our team members are best situated with the appropriate contacts to do so.

### Service Plans

*Question 11. Please provide additional details regarding your service plan which was outlined in your response to the RFP including, but not limited to, timing of reports, attendance at physician appointments, correspondence with employer and adjuster, job site analysis when RTW is an issue.*

Reports are completed at a minimum of every 30 days. If the amount of work dictates an early report, it is done. Or if an account dictates more frequent updates, then that is completed per their request. All reports written will be concise and complete.

Communication is key to this job. Every party that needs to be updated should be updated very frequently. Most updates on events on a file should occur within 2 hours if not sooner. Most nurses update the account right after every appointment with claimant. Case Managers all have Smart Phones in order to be able to communicate quickly and concisely. Case Managers should also be communicating with all necessary parties in order to facilitate proper communication and to keep everyone on the same page.



Job site visits and analysis are encouraged whenever warranted. If a physician appointment warrants a visit, the nurse case manager will attend. If it is not needed, the appointment can be covered telephonically unless otherwise requested by the account. The nurse case manager should know any special instructions or request of the account in order to follow their guidelines.

### Injury Specific Service Plans

*Question 12. Give a summary of how each of the following injuries would be handled from start to finish:*

- a. Record only
- b. Medical only
- c. Lost Time with no Surgery
- d. Lost Time with Surgery

In regards to all claims, TRIUNE Health Group's belief is to work with all levels of management and define a logistical program of attaining notification of all injuries at or close to the time of occurrence. This allows us the ability to have the most effective means to adequately assess the injury, provide proactive treatment, and attain the most cost effective approach of treatment, while ensuring a RTW process is continuously updated and implemented.

#### Record Only:

- With use of early intervention and immediate notice, these claims would be opened, assessed and immediate treatment care plan would be initiated.
- Use of the early intervention would focus on conservative care and immediate proactive treatment implementations.
- The claim would remain open to ensure RTW plans are in place to limit the lost time potentials.

#### Medical Only-

- Attain immediate notice of injury at time of accident.
- Attain medical status of employee.
- Identify Provider specialty needed from PPP network for proactive care.
- Make contact with selected provider to ensure RTW potentials are addressed.
- Attain RTW availabilities and modified duty potentials from employer/supervisor.
- Update employer contacts throughout case intervention.
- Prepare treatment and RTW projections.
- Proactively prepare provider updates prior to each appointment.
- Attain case closure upon successful RTW and completion of medical treatment.

#### Lost Time with no Surgery:

- Attain immediate notice of injury at time of accident.
- Attain medical status of employee.
- Identify Provider specialty needed from PPP network for proactive care.
- Make contact with selected provider to ensure RTW potentials are addressed.



- Attain RTW availabilities and modified duty potentials from employer/supervisor.
- Update employer contacts throughout case intervention.
- Prepare treatment and RTW projections.
- Proactively prepare provider updates prior to each appointment.
- Attend approved appointments by the employer with focused objective goals set for each appointment.
- Nurse Case Manager communications weekly with each employee to ensure proactive and positive treatment plans are in place and focused on the earliest return to work programming availabilities.
- Submit regular status updates after each appointment and each significant impact change events.
- Attain case closure upon successful RTW and completion of medical treatment.

**Lost Time with Surgery:**

- Attain immediate notice of injury at time of accident.
- Attain medical status of employee.
- Identify Provider specialty needed from PPP network for proactive care.
- Make contact with selected provider to ensure RTW potentials are addressed.
- Attain RTW availabilities and modified duty potentials from employer/supervisor.
- Update employer contacts throughout case intervention.
- Prepare treatment and RTW projections.
- Proactively prepare provider updates prior to each appointment.
- Attend approved appointments by the employer with focused objective goals set for each appointment.
- Nurse Case Manager communications weekly with each employee to ensure proactive and positive treatment plans are in place and focused on the earliest return to work programming availabilities.
- Submit regular status updates after each appointment and each significant impact change events.
- Attain case closure upon successful RTW and completion of medical treatment.
- Implement employer authorized contacts with providers and facilities to attain expedited treatment/surgical needs and provide cost containment reductions when applicable for procedures and diagnostic testing for the employer and employee.



## Notice of Confidentiality

TRIUNE Health Group Ltd. is submitting this proposal specifically to assist the *City of Springfield, IL and Sangamon County, IL* in the evaluation of TRIUNE Health Group Ltd. Managed Care capabilities. It is our understanding that this proposal which contains confidential and proprietary information will be viewed only by the *City of Springfield, IL and Sangamon County, IL* for the purpose of such evaluation on a strict need to know basis only; and will not be shared with or used by any other individuals without the express written consent of TRIUNE Health Group Ltd.

Representatives of the *City of Springfield, IL and Sangamon County, IL* agree to hold in confidence any information obtained relating to the business of TRIUNE Health Group Ltd. and agree to instruct your employees to keep all information strictly confidential in the same manner in which you maintain your own confidential and proprietary information. Representatives of the *City of Springfield, IL and Sangamon County, IL* also agree to not directly or indirectly disclose to any other person, firm or corporation any of the information, including, but not limited to; customer information, personal information, sales and pricing information, training programs, materials manuals and procedures, systems methods, ideas, or processes of any product or service provided by TRIUNE Health Group Ltd. as described in our proposal.

Should the Representatives of the *City of Springfield, IL and Sangamon County, IL* disagree with our understanding relative to the sharing of information as contained in this document, please notify TRIUNE Health Group Ltd. and return the information prior to the initiation of furthering this process. TRIUNE Health Group Ltd. submission of this information to you is contingent on your agreement to maintain the confidentiality of such information and to use such information solely as provided in this Confidentiality Statement. Absence of contact with TRIUNE Health Group's staff will indicate full agreement with all aspects of this statement.

This proposal and any attachments affixed hereto and made a part hereto embodies the entire understanding between the Parties and supersedes all previous negotiations, representations, writings and agreements, written, or oral, with respect to the subject matter herein. Any term or conflicting terms or conditions contained in any other document pursuant to the subject matter herein are hereby abrogated. Representatives of the *City of Springfield, IL and Sangamon County, IL* agree with TRIUNE Health Group that this proposal shall not be altered, amended or modified, except in writing that is signed by an authorized representative of both Parties.



Appendices



OFFICE OF BUDGET AND MANAGEMENT  
PURCHASING DEPARTMENT  
CITY OF SPRINGFIELD, ILLINOIS

October 19, 2011

Triune Health Group  
6723 Weaver Road, Suite 103  
Rockford, IL 61101

ATTN: Christopher Yep

RE: Questions for Case Management

1. What is the average case load for your nurse case managers (NCM)? What is the maximum?
2. Will the NCM handle files for other employers? If yes, please discuss how the additional work will impact cases involving Springfield and Sangamon County employees.
3. Please confirm the individuals you have designated to serve as primary and backup NCMs for Springfield and Sangamon County. If you have not done so already, please provide copies of the resumes for the designated primary and secondary NCMs. Such resumes should detail information such as the NCM's education, work experience, case management experience and certification.
4. Who will serve as backup if both primary and secondary NCM are unavailable?
5. Please describe your NCM's familiarity and work history with medical providers in Sangamon County.
6. Where is the headquarters or location of the designated supervisor for this account?
7. Will case management continue to be "field case management" until the employee is returned to work?
8. Please comment on the how much experience your NCMs have in depositions and/or testimony before an Arbitrator.
9. What is the plan of action on existing open case files? Will all open files be reviewed and summarized or only problematic or lost time cases?
10. Do you have access to more than one PPM?
11. Please provide additional details regarding your service plan which was outlined in your response to the RFP including, but not limited to, timing of reports, attendance at physician appointments, correspondence with employer and adjuster, job site analysis when FTM is an issue.
12. Give a summary of how each of the following injuries would be handled from start to finish:
  - a. Record only
  - b. Medical only
  - c. Lost time with no surgery
  - d. Lost time with surgery

500 South Seventh • Room 260 • Springfield, IL 62701-1061 • (217) 789-2205 • FAX (217) 789-2207



Your answers must be received by no later than Wednesday October 26<sup>th</sup>, 2011. Your interest in this proposal has been appreciated,

A handwritten signature in cursive script, appearing to read "Jay Waverling".

Jay Waverling  
Purchasing Agent  
City of Springfield