

The View from “80,000 Feet”: Todd Park in the Run Up to Healthcare.gov



A staff report by the Minority Staff of the
Committee on Science, Space, and Technology
for Ranking Member Eddie Bernice Johnson
and the Members of the Committee’s Democratic Caucus

November 18, 2014

The View from “80,000 Feet”: Todd Park in the Run Up to Healthcare.gov

To highlight the key findings of this report:

1. There is ample evidence that Mr. Park played a very limited role in Healthcare.gov. He was the person in the White House that others turned to when they had questions or needs related to progress on the program. This produced a voluminous record of queries from Park to the top management on the project at the Centers for Medicare and Medicaid Services (CMS). Park was engaged in the effort to reach out to diverse communities, to build excitement about gaining access to the healthcare Marketplace. CMS relied upon Park to assist them with interagency issues and in helping find resources when needed. None of that work could be described in any meaningful way as “substantial involvement with the development of the website’s privacy and security standards” or “intimately involved with the development of the Healthcare.gov website”. Those quotes come from the Majority’s staff report of October 28;
2. Having examined the complete documentary record from the White House, there is no record that shows Mr. Park receiving the normal management tools that would be an indication of intimate involvement in development. He did not receive the monthly progress reports from contractors, nor are there records of any involvement in setting contract requirements or giving managerial direction. There is no record that shows him engaged in technical efforts at understanding or shaping the design or coding of the Healthcare.gov web site. Those responsibilities were retained at CMS.
3. Based on a complete review of records, the Minority staff conclude there is no credible basis for an allegation that Mr. Park misrepresented his involvement in Healthcare.gov in his testimony before the House Oversight and Government Reform Committee on November 13, 2013;
4. Based on a complete review of records, the Minority staff conclude that there is no credible basis for an allegation that Dr. Holdren misled the House Science, Space, and Technology Committee in his representations about Mr. Park’s and OSTP’s involvement in cybersecurity in the development of Healthcare.gov;
5. The Science, Space, and Technology Committee’s Majority report of October 28, 2014, which made serious allegations suggesting that Mr. Park misled another Committee and Dr. Holdren misled our Committee, relied on a creative mixing of documents, from different people and periods of time, to try to create the impression that the allegations against Mr. Park and Dr. Holdren should be taken seriously. The Majority report also misquotes Mr. Park on a significant matter that unfairly suggests Mr. Park was not truthful in his testimony before another Committee—we recommend that Members seek to have the Majority correct that record immediately;
6. There is no evidence that Dr. Holdren had any meaningful involvement in Healthcare.gov issues, and Park does not include him in his circle of officials engaged in the education and outreach work on the launch of the Marketplace;

7. The Majority attempted to ambush Mr. Park in a fake “briefing” where they were going to surprise him with accusatory questions, selective documents, and a transcriptionist. When the White House, nervous about the transcriptionist, backed out, the Majority issued an accusatory report to push an unfair and unsustainable story-line that attacks Mr. Park’s veracity and his reputation. There is no justification for such disrespectful conduct towards Mr. Park.

BACKGROUND

This staff report is designed to provide background context and detailed documentary evidence regarding a hearing to be held by the Oversight Subcommittee titled, “The Role of the White House Chief Technology Officer in the Healthcare.gov Website Debacle.” This Committee has held two prior hearings on Healthcare.gov and has sent several letters related to the site to the Administration, but the focus of all prior work has been cybersecurity on the site.¹ The title of the upcoming hearing suggests that the Science, Space, and Technology Committee has shifted its focus from an area of clear jurisdiction, cybersecurity, to a broader set of questions about program performance. The program was managed and launched by the Centers of Medicare and Medicaid Services (CMS), an office at the Department of Health and Human Services that is not typically considered to be in the Committee’s jurisdiction. No officials at the White House had anything to do with the day-to-day management of the army of contractors who were responsible for carrying out all aspects of the project.

The Majority have telegraphed their messaging for this hearing both in their choice of a hearing title and also in a staff report released October 28, 2014. That report was titled, “Did the White House Knowingly Put Americans’ Sensitive Information at Risk? Committee Seeks to Clarify Contradictions Surrounding Senior White House Official’s Role in Developing Healthcare.gov.” That report makes several serious sounding allegations on very thin or tortured readings of an incomplete documentary record. The Majority report presents a pastiche of quotes and memos cited from different time frames, mixed together in clever but misleading ways, with many of the quotes in the report not involving Mr. Park at all and with no effort to clarify which of those things he may have known and which he certainly did not know.

Yet this stew of statements are woven together in a way that attempts to set the stage for a claim that both Mr. Park, the former Chief Technology Officer and Special Assistant to the President, and Dr. Holdren, the Director of the Office of Science and Technology Policy (colloquially, the President’s science advisor), misled the Committee on Oversight and Government Reform and the Committee on Science, Space, and Technology. The report quotes, and, in one instance, misquotes, Mr. Park to prove the central allegations of the report: that Park was “intimately involved with the development of the Healthcare.gov website,” and he had “substantial

¹ U.S. House of Representatives. Committee on Science, Space, and Technology. *Is My Data on Healthcare.gov Secure?*, Hearing. 19 Nov 2013. 113th Congress. U.S. House of Representatives. Committee on Science, Space, and Technology. *Healthcare.gov: Consequences of Stolen Identity*, Hearing. 16 Jan 2014. 113th Congress.

involvement with the development of the website's privacy and security standards". If those claims were true, Mr. Park could be accused of misrepresenting his position in testimony before Chairman Issa on November 13, 2014. And if the second allegation were true it may also lead to a conclusion that Dr. Holdren made misleading representations to this Committee. These allegations, if supported by documentary evidence or witness testimony, could potentially place Mr. Park in legal jeopardy. Given the large personal stakes for Mr. Park, the irresponsible way the Majority manipulate the record to try to support their incredible claims is especially disturbing.

Two of Mr. Park's quotes from the November 13, 2013 House Oversight hearing are made much of in the Majority report.

When Park was asked if, knowing how October 1 turned out, he would have asked to see the site launch "delayed or pushed back," Park responded:

"I don't actually have a really detailed knowledge base of what actually happened pre-October 1. I don't know what levers were available. So I would hesitate to make any point now."²

When asked about how much more testing of the website Park would have done prior to launching, the Majority report reads:

"I am not even familiar with the development and testing regimen that happened prior to October 1. So I can't really opine about that."³

This second quote is particularly threatening to Park because there is a significant e-mail chain of July, 2013 that shows Park getting a detailed account of development and (non-cyber) testing from Henry Chao (Deputy CIO, CMS) and Michelle Snyder (COO, CMS).⁴ This chain calls into question the seemingly absolute claim made by Park. However, **the Majority staff report, drawing from the "official" transcript produced by the Majority of that Committee,**

² "Did the White House Knowingly Put Americans' Sensitive Information at Risk? Committee Seeks to Clarify Contradictions Surrounding Senior White House Official's Role in Developing Healthcare.gov," A Report by the Majority Staff of the Science, Space, and Technology Committee, U.S. House of Representatives to Chairman Lamar Smith, Committee on Science, Space, and Technology and Chairman Paul Broun, Subcommittee on Oversight, October [28] 2014, p. 6.

³ Ibid, p. 6.

⁴ Exhibit 1 contains White House records that show a common pattern for Park: he is tasked by the White House to learn something; he turns to Chao and Snyder for information; then reduces their information into a bite-sized chunk. In this example he takes four pages of detailed testing and roll-out information from CMS and turns it into a 4 point Powerpoint slide for a White House briefing.

misquotes Mr. Park’s reply. Instead of claiming he was “not even familiar”, what Mr. Park said was:

“I am not deeply familiar with the development and testing regimen that happened prior to October 1.”⁵

The official Oversight and Government Committee transcript is contradicted by commercial news service transcripts on this point. More importantly the recording of the hearing bears out that the Majority got it wrong, Mr. Park says “not deeply familiar”. We cannot account for the transcription practices of another Committee, but our initial inquiries to the White House suggest that the Oversight and Government Reform Committee did not submit the transcript to them for review. There is a world of difference between what appears to be an absolute denial of knowledge (“not even familiar”) and a qualified denial of knowledge. The documentary record from the White House shows no reason to believe that Park’s actual statement is at all inaccurate. The bottom line is that the Majority staff of this Committee used an inaccurate quote to try to make it appear Mr. Park perjured himself.

The Majority staff report made these poorly documented allegations before receiving White House materials from the critical months prior to launch of Healthcare.gov (May through October 1 of 2013). Now, the White House has turned over thousands of pages of documents that shed more light on Mr. Park’s involvement in Healthcare.gov. Upon a review of that fuller documentary record, it is impossible to sustain an assessment that Park was, as the Majority report put it, “intimately involved with the development of the Healthcare.gov website.”

“The bottom line is that the Majority staff of this Committee used an inaccurate quote to try to make it appear Mr. Park perjured himself.”

Based on the most recent White House document production, it is easy to demonstrate that Park gathers a lot of information on a wide array of issues related to the program. However, using the description that he was “intimately involved” in the project implies a direct, daily managerial contact with the army of contractors. There is no document that shows such contact. In fact, the

⁵. Page 98 of the transcript from the Issa hearing with Todd Park has this quote – in response to a question from Congressman Gowdy about testing before the launch of the site on October 1st: Mr. PARK. I am not **even** familiar with the development and testing regimen that happened prior to October 1. So I can’t really opine about that.” In Part 2 of the video linked below, at about 22:15 seconds, in response to Congressman Gowdy’s question on testing Park actually says: Mr. PARK. “I am not **deeply** familiar with the development and testing regimen that happened prior to October 1. So I can’t really opine about that.” <http://oversight.house.gov/hearing/obamacare-implementation-rollout-healthcare-gov/> Page 47 of the Federal News Service transcript, has Todd Park saying: MR. PARK: So I’m not **deeply** familiar with the development testing (regimen ?) that happened prior to October 1, so I can't really opine about that -- (inaudible).

documents reveal largely superficial contacts with contractors, usually mediated by CMS staff and focused on morale building rather than web design. This report highlights several examples of Park's real role--what it was and what it was not--and we are attaching over a hundred pages of previously unreleased White House materials so that people can come to their own opinion.

There is circumstantial evidence that the Majority has an animus towards Mr. Park, and that evidence rests on activities that are largely outside the public's view. In both the meeting of the Subcommittee to issue a subpoena for Mr. Park and in their staff report, the Majority make much of the fact that Mr. Park cancelled an appearance for a Subcommittee Member's briefing for scheduled for September 10, but they have not been transparent about what led to that cancellation or their plans for that event.⁶ In August, the Majority received documents from the Committee on Oversight and Government Reform that covered communications between HHS and Mr. Park. This Committee had not previously received those materials, and the Majority staff relied upon these materials to write their accusatory October 28 report. However, the Majority did not tell Mr. Park or the White House that they had received those materials. The Majority were even reluctant to tell the White House that they had engaged a court reporter to make a transcript of the "briefing." The Majority appeared to be welcoming Mr. Park to come brief them, while planning to get him into the room, without counsel and without notice that they possessed materials they believed would show he had misrepresented himself, and transcribe the confrontation. The Majority's planned September 10 ambush of Mr. Park was designed to place him in serious legal jeopardy. If this conduct does not telegraph animus, and disrespect, it is hard to know what would.

In evaluating the claims that Mr. Park was "intimately involved with the development of the Healthcare.gov website" and had "substantial involvement with the development of the website's privacy and security standards", one cannot lose sight of the fact that the development of the site was a product of contractual relations between CMS and the contractors on the project. By law, only CMS officials could set or change requirements and define deliverables. In none of the material provided to the Committee is there any evidence that anyone at the White House, and certainly not the Chief Technology Officer (CTO), took any step that directed requirements or deliverables. Nor are any of the usual documents used to maintain insight and control over a project--especially the monthly performance reports from contractors--found in the White House records.

In an interview with the House Oversight and Government Reform Committee, Michelle Snyder, the Chief Operating Officer at CMS (and Henry Chao's direct supervisor on the development project) was asked about Park's role in the development and she said this:

⁶ Withdrawal from the briefing is mentioned on the second page of the body of the Majority's staff report. "Risk?" p. 4.

“I would say with Todd, you know, Todd operates at a -- and again a good way to think of this is, if I say Henry is ground level, and I’m 40,000 or 50,000 feet, Todd is 80,000 feet.”⁷

The actual documentary record confirms Snyder’s characterization. The records demonstrate that Park did not have intimate day-to-day exposure to the program, the contractors, the development’s progress or problems, and he had no authority to tell anyone to do anything. He dipped in and out of Healthcare.gov as his leadership’s needs bubbled up or requests for help with resources or interagency issues came to him from CMS. He ended up covering a lot of different issues with the experts at CMS, but his involvement was not sustained and it was not a managerial involvement. He served more like a press secretary or legislative assistant--to use an analogy that makes sense in the context of Congressional offices--where he asked questions of the experts, gathered some materials from them and then boiled it all down to a powerpoint slide or a few bullet points for use with the press. Park’s exposure to the development of Healthcare.gov was wide but not deep, episodic not constant, and acting as a supporter not manager. Based on the documentary record from the critical months of May to October of 2013, the most accurate description of Todd Park on Healthcare.gov development is that he was a knowledgeable outsider to the development and validation of the website prior to October 1, 2013.

“(If I say Henry is ground level, and I’m 40,000 or 50,000 feet, Todd is 80,000 feet.”

Michelle Snyder, Chief Operating Officer, CMS

“Park’s exposure to the development of Healthcare.gov was wide but not deep, episodic not constant, and acting as a supporter not manager.”

TODD PARK AS CHIEF TECHNOLOGY OFFICER OF THE UNITED STATES

Todd Park left a highly successful career in the IT innovation world to join the Obama Administration, first (in 2009) as CTO for HHS and then, in March of 2012, President Obama named him Chief Technology Office of the United States. Park had co-founded athenahealth in 1997 and then in 2008 co-founded Castlight Health. Both firms were very successful working in the market space of providing information technology tools to make healthcare delivery more

⁷. Transcript of Interview with Michelle Snyder by the staff of the Oversight and Government Reform Committee, December 3, 2013, p. 192.

effective and efficient. His co-founder at athenahealth was Jonathan S. Bush, a cousin of President George W. Bush.

The receipt of over 8000 pages of White House documents related to Healthcare.gov responsive to the Committee's request, is useful for the work of the Committee, but distorts Mr. Park's actual work. While no one denies that Mr. Park had contact with CMS regarding issues related to Healthcare.gov, it would be a mistake to pigeon-hole Park solely as the "HealthCare.Gov" guy in the White House. As CTO in the White House, Park oversaw multiple efforts to use IT and the internet as a means to make the government more responsive and transparent to the people, and to take steps to spur the spread and infusion of technology across the economy and society.⁸ While his position certainly gave him extraordinary insight into how things were unfolding in the development of an online healthcare marketplace, his attention was pulled across a wide range of initiatives simultaneously. The Majority are trying to define Park's job as solely about developing the online Marketplace, Healthcare.gov, but he did not have the luxury to work on that and nothing else for the months leading up to its launch.

Park led initiatives aimed at a wide swath of opportunities to use technology in creative ways. He was responsible for the Open Data initiative to put government data on energy, health, education, finance, public safety and global development online. He oversaw "My Data" which is designed to give citizens secure access to personal information about themselves with initiatives such as "green button"--where private sector energy companies make data about energy usage available to consumers. Initiatives to improve disaster response and to fight human trafficking also fell to the CTO. The CTO was engaged in "ConnectEd", an initiative to expand broadband access for k-12 schools and to improve training and course materials available to teachers for digital learning. The CTO was also supporting a wide-ranging effort to use the free up more spectrum to spur innovation and bring more, higher quality services to consumers and businesses. The CTO worked on internet policy for the Administration, including how to balance online privacy against the need for an open, innovative internet. Park established the Presidential Innovation Fellows program to attract bright innovators from the private sector to come work for up to a year with a paired innovative government official to address a targeted problem. The CTO also works on the President's "Open Government" initiative to make the government more transparent, responsive and collaborative.

These were initiatives "owned" by the CTO. In almost all of these areas, Park is overseeing an interagency process that would require a lot of collaboration, communication and cajoling of agencies to make progress. A fuller examination of Park's record of emails would reveal the breadth and energy of Park's involvement as CTO; Healthcare.gov was just a small piece in a very large pie. Park brought to his job the experiences of leading successful startups in the competitive, fast paced IT and venture capital world. His approach relies on "open innovation" or "crowdsourcing" and the "Lean Startup" philosophy of getting small, dedicated teams focused

⁸ Exhibit 2. This profile from the New York Times provides a good exposure to how Park was thinking about Information Technology challenges as CTO and the profile is not all about Healthcare.gov in large part because Park's job was much larger than just that.

on achieving what is doable, and then, through rapid innovation and continuous improvement, building out from that base. Park was trying to bring these values to his work across the board as CTO.

Park was pulled into work on Healthcare.gov by colleagues at the White House or at CMS when they had specific needs. He was clearly trusted by all sides to understand the challenges of a technology start-up, which is essentially what CMS was doing in their development of the website. However, he himself had a full time job just tending to the CTO's wide portfolio of initiatives and Healthcare.gov was very much a sideline that left Park at a very great distance from the day-to-day management of the project.

This is not to say that Park was not tempted to ask questions and brainstorm with technical people working on the Healthcare.gov project when he had the chance--he had been a brilliant developer in his start-ups. But he did not have the bandwidth to stick in that role, knew that too much interference would actually hinder the build being managed by CMS, and, on those rare occasions when he slipped up, CMS was not afraid to yank his chain and tell him to back off.

9 EXAMPLES THAT TODD PARK WAS NOT INTIMATELY INVOLVED IN DEVELOPING HEALTHCARE.GOV

The attached documents are designed to let fair-minded readers form their own opinions, but we believe that the evidence on Park's role is very clear and can be well illustrated with nine examples.

1. Park and the White House Could Not Direct Contractors

On June 29, 2013, the Deputy Chief Information Officer at CMS, Henry Chao wrote to Park regarding a meeting Park had with a subcontractor, Ideo. Chao wrote,

“I wanted to talk to you about a meeting you had with Ideo. Apparently something was misinterpreted from what you said and the top dog you met with circled back to OC [the CMS Office of Communications; OC was in charge of certain key elements of the user experience interface] and started to work on an alternate rendering of the paper form as if they were instructed to follow a different set of requirements. This is a pretty big issue since Ideo does not get to change requirements and scope without it coming from CMS directly. If there's anything you can do to help clear this up we would greatly appreciate it, or rather the program would appreciate it since it will hold the line of confusion and risk.”

Park responds, “Will work on making (this) happen as you've requested and report back!” Mary Wallace, Deputy Director in the Office of Communications at CMS reinforced Chao's message:

“... I think the real concern is to not have contractors trying to interpret what they think you or others from HHS or the White House asked them to do. The biggest

help would be for all of you to carry the message that the best thing IDEO (or any contractor) can do is what CMS is asking them to do... We have a lot of contractors supporting this effort and we are working hard to keep them all on the right track to get everything done in time.”

Park responds: “Hi Mary, thank you for the flag, will absolutely do!”

Todd reports back that same day, “Hi team, just pinged Team IDEO (including the CEO) and said that they should be sure to follow CMS’s lead, and that CMS is the unambiguous operational leader of all of the Marketplace work, in case that wasn’t clear 😊... But what I’ve clarified in our follow-up ping is that we are going to circle back with CMS on this (to understand current UX [user experience] decisionmaking process and if any further support/air cover for user-centric-ness is needed on an ongoing basis...” There is no evidence that this “circle back” ever happens, and as the record revealed, Park himself could not get a hands-on user experience of the website until September. However, this exchange shows that CMS was clearly in charge—the keepers of requirements and scope on the project and the only ones with the power to direct contractors. It also reveals that Park’s natural orientation is not towards a deep understanding of the scope and requirements of the contract or an appreciation of the challenges of managing and integrating a large team of Federal contractors; those issues, which lie at the heart of what was delivered on October 1, were solely the domain of CMS.⁹

2. CMS Refuses Park’s Offer to Help with “Creative Solutions” on Spanish Translation

On September 12, Park sends a note to Marilyn Tavenner about why the roll-out of functional Spanish language translation for the Healthcare.gov site would not be ready by October 1. “Macon (Phillips, White House Director of New Media) pinged me, and asked what the root of the technical issue was and if a creative solution might be possible. I said that I would check with you 😊 Might you be able to circle back with your tech team on this question? If it would be even remotely helpful, I would be more than happy to join the technical conversation as well.” In a follow up e-mail that same day, Park writes, “To help with internal understanding here at the WH (and therefore with mobilizing energy and help for external messaging!) would you mind if I got on the phone with Henry [Chao] for 5 min to get a quick download on the tech details?”

Tavenner says, “Yes, but go through Michelle [Snyder--the Chief Operating Officer at CMS] first... Todd I need folks to understand the VERY best way they can help us -is to reach out to the advocates -educate them and garner their energy/support.” Tavenner loops in Aryana Khalid [Senior Advisor to Snyder] of CMS who responds to Park and closes with: “I know you are trying to help us and we so appreciate it. What we need is folks focusing on what they can do which is the messaging and talking to the advocates, not focusing on the IT or trying to come up with creative solutions to solve this. I hope this makes sense.”¹⁰

⁹ Exhibit 3.

¹⁰ Exhibit 4.

“What we need is folks focusing on what they can do which is the messaging and talking to the advocates, not focusing on the IT or trying to come up with creative solutions to solve this.”

Aryana Khalid, CMS to Todd Park, White House, CTO, September 12, 2013

Note that at this point, Park feels the need to ask permission to interrupt Henry Chao, who was doing the day-to-day management of the contractors on the project, to get 5 minutes to pursue this question. How can anyone seriously think Park is intimately involved in carrying the technical side of the program to completion? In any case, the response to his offer of technical assistance is a very clear message to stay in the lane of education and outreach and not to get in the way of delivery on the system through technical interventions. Park does not press his offer.

3. Chao Kills “Open Innovation” on Healthcare.gov

The start-up philosophy that was espoused by Park and others at the White House ran right into the wall of Henry Chao’s awareness that he had to build a site that would meet federal security standards and not multiply opportunities for fraud. In this clash of cultures, Chao was a clear winner.

On June 22, David Simas (WH Deputy Senior Advisor for Communications and Strategy) starts a long e-mail chain titled “this is great” about a blog post by Alex Howard. He sends his note to Park and Tara McGuinness (Senior WH Communications Advisor working Healthcare.gov). Park replies, adding Bryan Sivak (CTO/HHS) to the chain,

“I believe what Alex Howard is discussing in this (great) piece is the new Healthcare.gov content site, which is up and running, and for which the code has been posted on Github (an online repository for open source code). The content site will front-end the Marketplace -- but the actual Marketplace eligibility-checking/enrollment/plan compare functionality is not up yet. Bryan, can you confirm/elaborate? Thanks!”

Sivak offers a long reply that includes:

“we are going to publish the code this week... if you take a look at the /developers page you’ll see that we have detailed the programmatic mechanisms for accessing content, but have a ”coming soon” where the links to the GitHub

repos are... This is a paradigm shift for the federal government and the fact that its happening on Healthcare.gov is a really big deal for the tech community.”

There is more back and forth on this, focused primarily about how to get the word out about this innovation to the technology press/community, but the basic point is that letting other developers look at the code can be used as a means to quickly optimize performance and even expand functionality. This is a clear manifestation of a private sector approach of “crowdsourcing” innovation applied to the government. Github’s slogan is: “Build software better, together.”

However, Henry Chao weighs in a few days later. On June 28 he writes to a long list, including Sivak, Park and all the key CMS people:

“I want to express my reservations about putting nearly all the source code for the hc.gov/Marketplace Portal Website on Github and making it available for absolutely anyone in the entire world to use. While in its current state it does not contain the code for the Online Application, someone with less than honorable intentions can easily stand up a shadow site that would fake out the general public and they can do it easily and literally in just a day or less. While I believe and support sharing and being open about our codebase I think we have to balance that with safeguarding security, privacy, and the public trust.”

That email squashed future GitHub releases of code and the sensitive “backend” of the program was never put up.¹¹ This chain illustrates the culture clash between the entrepreneurial practices from Silicon Valley and the complex statutory and regulatory environment that the day-to-day managers of a multi-billion dollar acquisition know they have to live with.¹² In this area, the second set of considerations trumped the “innovation” of the first set of values. Also, one can’t lose sight of the fact that the discussion around this matter is about how to work the press to get maximum exposure for progress on Healthcare.gov.

4. Park Not Welcome at July “Readiness Review”

In July, Park spends five hours in a “deep dive” briefing with Henry Chao to understand how development of the Marketplace was proceeding (this appears to be the only “deep dive” between July 1 and October 1). Chao would have been boiling down hundreds of hours of work across the full array of development issues to give Park a sense of where they are because Park did not have that kind of time to give to the project. Park asks if he can attend one of the upcoming Readiness Review meetings that was to be an end-to-end walk through to cover where things stood with CMS and all the contractors. Chao initially seems to agree because he has Todd’s scheduler engaged to set time aside for Park.

¹¹. Adrienne Jeffries, “Why the government unpublished the source code for Healthcare.gov,” The Verge, October 18, 2013.

¹² Exhibit 5.

In an email that goes to Tavenner, Khalid, Snyder and Chao, Park writes:

“I am very much looking forward to being a fly on the wall at the E&E readiness review on the 19th. I’ll be able to attend from 11 am to 4 pm... David Simas is very interested in being a fly on the wall for a walkthrough of the FFM web workflow, and also would love to soak up a sense of the underlying complexity of the overall Mktplace machine.... he would really appreciate the opportunity, and/but also doesn’t want to disrupt things in any way.... (FYI, I’ve briefed him in detail about the fact that we’ve locked down business requirements and are in pure operational execution mode for Oct1/Jan 1). Thoughts?”

“Flys on the wall are seldom invisible and often distracting!!!”

Michelle Snyder to Todd Park about attending an all-contractor readiness review on July 19.

It takes 9 minutes for Snyder to respond:

“We need to talk abt (about) attendance at readiness reviews. I am sure you can anticipate my position on that Fls on the wall are seldom invisible and often distracting!!!!”

Chao weighs in half-an-hour later:

“My recommendation is that the readiness review in which we conduct (sic) is not really conducive for being an observer at this point and we should stick to the briefing format for you at various intervals.”

Park then graciously withdraws from the event.

5. Park Can’t Get a Hands-on Walkthrough of Healthcare.gov

Beginning in July, Park asks Snyder and Chao if he can come do a walk-through of the live system. First he asks for a hands-on “tour” in Baltimore for August 5. After much negotiation (partly because others from the White House want to come), they set a time for the evening of August 8. On August 2, Chao writes to Park saying that Snyder has advised that the WH tour should be combined with a similar visit by Marilyn Tavenner expected to happen the week of August 26. Park says fine and explains to his colleagues that the exercise was being postponed. On August 22, Tavenner writes that she is on vacation that week and would look to do a walkthrough the week of September 3. **So the live experience of the system Park tried to arrange for early August did not occur until at least September 3.** It is hard to reconcile the claim that Park was deeply involved in the development of Healthcare.gov with the reality that

Park could not even get access to the web site experience as it was being developed. And when he finally gets what he asked for it is in the context of a big group visit.¹³

“It is hard to reconcile the claim that Park was deeply involved in the development of Healthcare.gov with the reality that Park could not even get access to the web site experience as it was being developed.”

Keeping Park on a short leash for his contact with technical people, precisely to guarantee that he does not distract them from their tasks, leads to this amusing exchange regarding a September 24 visit to the Herndon center. Snyder writes to Chao, Park and Tavenner:

“I have requested that the security cameras at Herndon be loaded with facial recognition software so that if either of you [Park or Tavenner] wander into a restricted area armed with a set of questions alarms will sound...”

Park responds: “Will absolutely obey all instructions with precision!! And really looking forward to the visit -- and more than anything, thanking everyone from the bottom of our collective hearts for the truly incredible work they are doing ☺” Tavenner reports back later: “I kept Todd under control (well sort of). Henry thanks for a great visit!!!”¹⁴

6. CMS Uses Park to Help When They Have WH, Interagency or Resource Issues

Park intervenes on several occasions to help CMS (most often at the behest of Henry Chao) out of jams of one kind or another. Park is tireless and uncomplaining when given these tasks and clearly views it as something he can do to help create the space for CMS to succeed in managing the program. Park speaks directly with Blue Cross and Blue Shield executives about why logos cannot be integrated into the site by October 1, and also lets WH staff who may be interested in helping BCBSA push back know that it could create program risk.¹⁵ Park helps Henry in August by arranging a call with executives from RedHat to make sure their very best people are put on Healthcare.gov development, and to ask for very specific types of specialists that Chao needs.

¹³ Exhibit 7.

¹⁴ Exhibit 8.

¹⁵ Exhibit 9.

When it succeeds, Park offers to contact the Federal agencies who would be losing some of those specialists in the “surge” around Healthcare.gov and also says if they need any other “surges” to just ask and he would pitch in to help make it happen.¹⁶ A few days before the system goes live, Tavenner asks Park to contact the state-based market leaders--clearly a task she was to do but felt she could not make time for. He spent two days tracking all 15 state IT leaders down and reported back.

In the last days before the Marketplace was to go live, Chao contacts Park to see if the White House can help arrange transport of server hardware from Florida to Culpeper, Virginia so that the communications center CMS had there could handle the expected volume of consumers logging onto the site. Park dutifully goes up his chain to see what is possible while helping them try to find a private sector solution. In the end, Verizon and CMS find that FedEx can do it using a special service and they go with that option.¹⁷ Park’s behavior clearly shows that he views himself as a resource multiplier for CMS, and he is always ready to throw his weight behind their requests for help.

7. Park is an Information Aggregator for the White House: Cybersecurity 1

As CMS uses Park to mobilize assistance from the White House -- provide “air cover” in Park’s phrasing -- staff at the White House turn to Todd Park to get information from CMS on a host of issues related to Healthcare.gov--records provided to the Committee show him doing this on development in July for a WH briefing and on Hispanic community outreach in September. However, much has been made by the Majority of Park’s “involvement” in cybersecurity, and so we believe that matter should be dealt with in detail. A review of the broad documentary record provided by the White House makes it very clear that Park is engaged in this matter in the August-September timeframe in response to concerns by the people he works for at the White House who desire to have a clear, convincing message on security. The White House was very aware that the press and Republican Members of Congress, were starting to spin up stories about the security of the site and so it was natural for White House staff to get up to speed on the development’s progress and to directly address any interagency needs for policy. At this time, there is also a report out from the HHS Inspector General about testing and security of the Data Hub part of the development for Healthcare.gov.

Park’s communications throughout this time clearly reflect his role is almost exclusively about message development and information gathering. He most definitely was not managing cybersecurity development of Healthcare.gov.

In August, the WH begins to ask questions regarding cybersecurity and privacy; Todd Park is tasked with gathering information. Park turns to the experts at CMS for help. On August 23, he writes to Michelle Snyder, Tony Trenkle, and Marilyn Tavenner with a subject, “Cybersecurity bullet points needed.” **“WH folks would love to get three basic bullet points describing how**

¹⁶ Exhibit 10.

¹⁷ Exhibit 11.

we will protect the Marketplace from cyberattack. Many apologies, but if we could get these by COB today, that would be fantastic is that possible? Below are three strawcase bullet points folks have drafted feel free to edit/change any way you see fit. See notes following each bullet as well.”

It is not clear that Park even drafted these bullets, but the questions he writes are revealing of his lack of confidence in the points. On the first point he notes, “want to make sure this is stated/framed accurately.” On the second point he writes, “you may want to replace this bullet entirely with another bullet that describes CMS’s cybersecurity approach and capabilities. If you want to add more than one bullet on that, that’s also totally cool.” In the event, CMS rewrites all three points with the first and second point reflecting substantially new information.¹⁸

This exchange sets the stage for an email thread titled, “Cyber next steps,” which is made much of in the October 28 Majority staff report’s effort to paint Park as intimately involved in decisionmaking around cybersecurity. The origins of the string are not clear in the materials included in the Majority’s report, but documents provided by the White House suggest there was a push to get a coherent message together due to external inquiries. The first email is from Park to Tony Trenkle with a cc to Michelle Snyder and it lays out three points. The first point is:

“We should convene a work session in the next week with you, Teresa, Frank Baitman [CIO at HHS], his CISO, and probably a DHS person and DOJ person (she [Snyder] was thinking someone who has experience going after cyberattackers), plus any other folks you want to have there to discuss how to protect the Marketplace from cyberattack. This would include a discussion of our defenses, the threats, and our responses to the threats. I would absolutely love to be part of as much of this meeting as I can, but also don’t want to be a scheduling bottleneck, and it should really happen sooner rather than later... You should go ahead and schedule the meeting, and I will try to be there for as much of it as I possibly can!”

“I would absolutely love to be part of as much of this meeting as I can, but also don’t want to be a scheduling bottleneck, and it should really happen sooner rather than later.”

Park to CMS staff in discussing the need to have an interagency meeting on cybersecurity and the Marketplace, August 28, 2013

Park’s note makes clear that he does not view himself as central to the substance of the cybersecurity discussion that is proposed--the conversation can go on without him. That is not the attitude of a person who is directly involved in shaping cybersecurity aspects of Healthcare.gov. And the point of the meeting would be a memo for the White House that lays out response steps for protecting the site from malicious attack.

¹⁸ Exhibit 12.

Later, that very same day (August 28), he again writes to Tony Trenkle, Michelle Snyder, Frank Baitman and Aryana Khalid:

“Aryana and I were also just in a meeting where we got some additional insight that is helpful:

- There is a cyber and ACA subcommittee hearing happening on September 11, so it probably makes sense to target putting together a memo by end of next week (and talking with Alex Karp by the end of next week to help inform the memo will try to set up time with him for Thursday the 5th)
- It sounds like folks would like the memo to cover (1) our preparation for and defenses against cyberattack, (2) what would our response/action be if an attack/crisis happened, and (3) how would we prosecute attackers. The roster for the meeting Michelle recommended (to include DHS and also DOJ to handle the prosecute part) sounds spot on.
- Potentially for incorporation in the memo: external validators who could speak to the quality and strength of CMS cyberdefenses, should that become useful. Alex Karp could be one, but might you have others as well?

The memo is again for internal eyes only, but it sounds like people will draw from it in appropriate ways for external communications purposes as well.”

This email puts the first one in the chain in a clearer light. White House concerns about having a strong, clear message on cybersecurity, and making sure there was a coherent interagency strategy, drove Snyder, Trenkle and Park to begin planning. What must have been an interagency meeting provided Park with more clarity about exactly what was desired by the WH for the memo.

The idea that it was an interagency meeting on ACA is confirmed by an email on August 29 from Edward Siskel (White House Counsel) to a long list of White House staff (Todd Park is among them) and including representatives from Justice, HHS, the Federal Trade Commission and probably DHS. Siskel wrote, “Thanks again for participating in yesterday’s meeting and for all the work you have been doing to help protect consumers during the roll-out of the Marketplaces. Below is a list of do-outs from the meeting based on my notes.” All of the to-do’s on this document have to do with public education materials regarding fraud and an effort to identify external validators who can speak to “public education/outreach, intake process, value of Sentinel, prosecution, etc.”

There are several places in the records where Park helps locate or asks for “external validators.” This is a strategy whereby a quotable expert is found who can confirm for reporters that a

particular plan or point is credible. This is a common technique that is used in Congress as well as the White House. When a story is pushed out, those doing the pushing also provide the names of experts who can speak to the credibility of the claim to “validate” the story.

Starting September 2, there is a (relevant) new thread started by Todd Park in an email to Chris Jennings, the President’s Senior Healthcare advisor. The email contains “cybersecurity background points for (redacted).” We know the redacted meeting referred to was a scheduled Presidential briefing. Park shares the same points developed by CMS on August 23 with a few updates from the August 28 initiative. Jennings writes back to Park:

“Ok, thanks Todd. Quite helpful and will serve as a placeholder for (redacted) We need to have all of this locked down for the September 11th hearing we also have to have strong message with Justice, FTC, HHS and others for our enforcement event the week of the 16th. I know we had reference somewhere to current federal standards and how they exceed private sector as well as track record of protection from attacks. Can you or someone provide that reference for me to bolster confidence building tomorrow? Thanks much for all. And safe and fun travels my friend.”

Park shares with CMS people looking for more details on the idea that federal standards are more rigorous than private sector standards. At 1:38 am on September 3, Park sends to Jennings an expanded set of bullet points that addressed Jennings’ question. These were done up by Frank Baitman (HHS) and Tony Trenkle (CMS). Later, Chris Jennings writes back to everyone to thank them for their help and to report the meeting went well.¹⁹

Instead of being a decisionmaker on cybersecurity, Park is involved here in what is an effort to prepare external messages and firm up interagency coordination on policy because of increased attention on The Hill and in the press. Significantly, nothing in these records suggests that Park is drilling down into the development of cybersecurity tools in the Healthcare.gov website, or the testing of those methods or anything of substance about FISMA requirements--the things that the Committee has had testimony about in prior hearings. When Jennings refers in his September 2 email to how Federal websites have more rigorous security standards than the private sector, Park cannot respond in substance, but has to send it to CMS to handle the issue. Time and again, he turns to CMS for expert knowledge in an area he is not expert in to

“Significantly, nothing in these records suggests that Park is drilling down into the development of cybersecurity tools for the Healthcare.gov website, or the testing of those methods, or knows anything of substance about FISMA requirements”

¹⁹ Exhibit 13.

inform the work of the White House. It is absurd to try to turn any part of this exchange into some evidence that Park had a substantial role in managing or developing cybersecurity code, requirements, standards, testing or performance for the website itself. An important point to note: Henry Chao, who is so often Park's contact on CMS issues, is not in charge of cybersecurity development for the site.

8. Park as a Spokesman: Cybersecurity 2

Not to diminish the value of spokesmen, but in complex, modern organizations they are rarely the principals in carrying out policy or directing resources. In his CTO hat, Todd Park often played the role of spokesman to the press regarding IT initiatives for the Administration. There are multiple examples of Park seeking information from CMS (not directing them to do things, but asking for their help) about Healthcare.gov in preparation for media contacts, but because cybersecurity is so important to the Majority's (mis)characterization of Park, it is important to examine an example of how Park worked with CMS to prepare for a press call.

On September 17, the Healthcare.gov team at the White House finished up editing and clearance on a press release entitled, "Obama Administration announces a coordinated interagency effort to prevent and detect consumer fraud in the Health Insurance Marketplace." This is obviously a release which has its roots in the education and outreach effort Park participated in as discussed above in item 7. The Office of Communications sets up a background call with the press for September 18. Park writes to Jessica Santillo of White House Office of Communications,

"Hi Jessica, I'm signed up to help with the call! Looping in Tony [Trenkle], Frank [Baitman], and Brian [Cook of CMS]. Two questions: 1. Is the call on background, or on the record? 2. Can Tony Trenkle and Frank Baitman join me on the call? They are the folks who know the details, and it would be super-helpful for them to be on."

Initially Santillo says that is fine and tells him the call will be on background according to "White House officials". Then Communications decides the call should be WH only leading Park to write to Trenkle, Santillo, and Baitman (as well as others at CMS)

"it looks like the background call tomorrow is with WH folks only, with detailed inquiries to be referred to agencies... I've let Jessica know that you guys are the font of detailed knowledge on CMS/HHS cyber and that I can talk to it at a general level only."

"I've let Jessica know that you guys are the font of detailed knowledge on CMS/HHS cyber and that I can talk to it at a general level only."

Park to Santillo, Trenkle, Baitman regarding an upcoming press call, September 17, 2013

This tone of acknowledging that the website technical experts reside at CMS is completely consistent with everything Park testified to before Chairman Issa on development more broadly and also is consistent with subsequent characterizations made by Dr. Holdren to this Committee.

Park sends around talking points on cybersecurity for their review, but acknowledges they are drawn from the past materials that had already been worked up on the issue—meaning that CMS had already approved (and re-written) much of it before. The next day, September 18, the day of the call, Park writes to Trenkle and Baitman with additional questions. These are significant because they demonstrate the state of Park’s confidence in cybersecurity matters just two weeks before the roll-out of Healthcare.gov. The first question:

“And Tony, one more background question: is it the case that the security testing is done by an independent contractor managed by CMS info security staff, and that the review of results, assessment, and signoff happen via you, the CISO, and CMS info security staff? Thanks!”

Twenty minutes later he sends another email,

“And Tony and Frank, sorry, one more background question: the press release today says: “Together with our interagency partners, CMS has developed a rapid response mechanism to respond to a potential data breach and mitigate the effects of attempts to jeopardize the integrity of the Hub and the database it connects” Is this the same thing as the Incident Response capability discussed in Marilyn’s letter, but with souped up interagency coordination? Or is it something different?”

Trenkle confirms that he has both characterizations right. Baitman also sends a reply, but it is responding to another question that Park had buried in his draft talking points about how many Authority to Operate (ATO) security certificates would be issued for Healthcare.gov. Park thought there would be multiple ATO’s issued; Baitman says just one for whole system—this key point Park got wrong.²⁰

It is significant that Park is uncertain about these very basic points. Anyone substantially involved in the cybersecurity side of Marketplace development would know these matters inside and out—they are sort of cybersecurity 101 questions. The fact that Park does not seem to know who the security testing contractor is—typically in this kind of note he would mention the company—is another “tell” that Park is working in the shallow end of his knowledge pool. These questions illustrate that an effort to describe Park as intimately involved in cybersecurity development is simply ridiculous. **Not to lose sight of the obvious: Park’s only reason for another crash course on cybersecurity was to serve as a spokesman with the press as a “White House Official” explaining the Administration’s initiative.**

²⁰ Exhibit 14.

9. Park Brings the Cupcakes: Tending Team Morale

On the 28th Park writes to Chao: “I have permission from Michelle (Snyder) to bring y’all food tomorrow (the 29th) in Herndon on the condition that I leave immediately after delivering the food and not involve you in a long and super-interesting conversation that takes time away from your incredibly important work 😊” Park offers to bring lunch or dinner, but Chao indicates meals are covered and tells Park, “you are in charge of the out of the ordinary surprises.”

Park goes to Georgetown cupcakes to get 150 cupcakes and Haagen Daz for ice cream. He tells Chao that his father is driving him to Herndon, and that he will deliver the food and leave. Chao responds: “I think you can come in and help dole out the food and say hello. People here want to be able to at least see you in person. It really makes them feel like someone cares enough about their contribution to do this kind of thing so come in for at least 30 minutes but don’t wander to where the architects and engineers... are because they will never let you leave.”²¹

“People here want to be able to at least see you in person. It really makes them feel like someone cares enough about their contribution to do this kind of thing...”

Chao to Park bringing 150 Georgetown cupcakes to lift morale at the Herndon site on September 29, 2013

This small anecdote sheds light on the way that Chao used Park on several occasions: to inspire the various teams working to get Healthcare.gov up and running. Park was an ambassador from the White House and he invariably tried to bring food. The email record is full of offers of Park to bring humus, cookies, cupcakes at the drop of a hat. And from all written accounts, Park is passionately enthusiastic and grateful for the hard work the teams were doing.

Anyone who has led groups of people through hard tasks -- any kind of campaign, for example -- knows how important small acts of kindness and appreciation are to keeping people motivated and moving forward. Park played this role very, very well.

Even at the very end, Park was trying to inspire people to great efforts to make October 1 a success. At 11:02 pm on September 30, Park sends an email to a string of top CMS and Verizon/Terremark, CGI recipients. Because it is so revealing of Park’s attitude and personality, it is worth quoting from at length.

“Dear Laura, David, and Chris, thank you so very much for the heroic work you have done and are doing to support Marketplace go-live! We have one more favor to ask:

²¹ Exhibit 15.

I understand from Henry that a Verizon/Terremark team is working very hard to activate all the new hardware that's arrived at Culpeper.

Every new VM, every ounce of additional power adds materially to the probability of a successful go-live tomorrow morning.

If there is any possible way that you could 2x, 3x, 4x progress by having teams work in parallel tonight, that would be absolutely amazing.

Possible?

This is a historic moment, and the team is so very close to pulling off a feat for the ages -- is there any way to amp things up even further?

We would be massively, massively appreciative -- please contact Henry with questions/thoughts!"²²

Here Park is playing his role as an inspirational voice asking for the last, best effort from those on the front line, without undermining CMS's authority. In the end, there was only so much exhortation could do to bring the new servers on-line, and it is highly unlikely that insufficient hardware was the sole issue that contributed to the problems on October 1. The problems on October 1 are precisely what led Park to be pushed out of his roles as aggregator, advisor, supporter and spokesman -- roles appropriate to the months leading up to launch -- to join a small team working to get down into the guts of the web site to analyze what was wrong and how to make it right. In that, they succeeded, but that success is not of much interest to the Committee.

CONCLUSION

Looking at the record: Park was not to give contractors direction, was not welcome at the readiness reviews, was not able to get a hands-on walkthrough of the web experience, was turned away on offers to help with technical problems. Time and again he is pushed by senior CMS officials back out of technical discussions or too much on-site time and back to his 80,000 foot orbit. He appears to take these nudges with grace.

The thousands of pages of records simply do not sustain a claim that Mr. Park had "substantial involvement with the development of the website's privacy and security standards" or was "intimately involved with the development of the Healthcare.gov website" as the Majority Staff Report framed their allegations. To believe these allegations you have to ignore all the examples offered in this report of what Park was not allowed to do by CMS. To believe these allegations you have to distort the record into unrecognizable form. To believe these things requires that a person know absolutely nothing about how multi-billion dollar Federal software acquisitions are managed. None of the normal signs of substantial or intimate involvement in that management—communications around requirements, critical path progress and key technical issues, changes to scope, work orders, spend rates—can be found in the records involving Park. The anecdote about his conversation with Ideo, and the pushback he got from Chao, is as close

²² Exhibit 16.

as the record comes to showing Park interacting on program details with a contractor, and in that case Park is schooled on staying in his lane.

In an interview with the staff of the Committee on Oversight and Government Reform, Henry Chao was asked about Park's involvement in development of the website:

“Counsel: ... he [Park] wasn't involved in the day-to-day management of the Federal marketplace. Is that correct? The IT?”

Chao: Correct. Not managing it. I think he was, of course, you know, part of the overall what I would consider the senior leadership, the technical leadership anyway, for the Federal Government, of which there's a natural alignment that needs to occur between all technical kind of issues, because of his role.

But he didn't own anything, meaning, you know, he didn't have the budgets, the staff, the contractors. So the day-to-day management really still falls to the operating agencies that are kind of trying to implement the program. He served as --advises on issues, helps you air certain cross-cutting issues, create, I believe I mentioned this, a forum to discuss and collaborate on cross-cutting issues... Interagency. Or even interdepartmental in some cases. So, you now, he's best suited, you know, to kind of do that role because of his position.

....

Counsel: So he would check in and have conversations to see what was going on, but he wasn't necessarily, how do you put it, like on the ground looking at -- looking at code, looking at --

Chao: No. He -- yeah. He doesn't provide direction... He's not, you know, officially in the chain of command, you know, because I take my direction from Marilyn Tavenner and the center director of CCIIO, and the chief information officer and the chief operating officer of the agency.”²³

Todd Park did do a lot of work related to Healthcare.gov. The record makes abundantly clear what Park's role in Healthcare.gov was prior to October 1, 2013. He was the chief support for CMS needs within the White House, and was the chief representative for the White House when Chao was looking for a cheerleader to come inspire the teams. He was an asset with the private sector both in outreach on ACA, but also when Chao was looking for access to top contractors who could help his program or when there was a need for external validators. The vast majority of email communications between Park and CMS, most frequently Henry Chao and Michelle Snyder, are requests for information driven by Park's own need to provide information to his leadership within the White House or to be prepared to interact with the press or public as a spokesman for the White House. In all of these roles, Park excelled. On balance, the records

²³ Transcript of Interview of Henry Chao by staff of the Committee on Oversight and Government Reform, July 22, 2014, starting on p. 78.

show Park to have been endlessly energetic, enthusiastic, creative, and optimistic. But on technical questions related to the development of the website prior to October 1, we are convinced that “knowledgeable outsider” is an accurate description.

Mr. Park has already enjoyed a successful career as an IT entrepreneur and job creator. He gave that up for a few years to come to Washington to improve the performance of the government in delivering services to the American people and to try to improve our country by pushing innovation to address social needs and economic opportunities. Based on the thousands of pages of records and his prior testimony, he did nothing wrong at any stage of his relatively short public career. We can find no basis for alleging that he misrepresented himself before the House Committee on Oversight and Government Reform, and absolutely no evidence that he had a substantial role in cybersecurity development. That should also dispose of the allegation offered in the Majority’s staff report that Dr. Holdren misled the Committee in his communications about Mr. Park’s involvement in developing cybersecurity standards and tools for Healthcare.gov. As to Dr. Holdren himself, there is absolutely no indication in the White House records that he had any role in Healthcare.gov. So far as we could determine, Dr. Holdren is on none of the email chains involving Park and CMS. The bottom line is that the records in our possession appear to exonerate both Mr. Park and Dr. Holdren of the allegations made against them in the Majority staff report.

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Saturday, July 13, 2013 8:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA)
Subject: Testing information
Attachments: testing summary to Henry 07 12 2013.docx
Importance: High

Attached is the requested information you asked for on testing.

Let me know if you need anything else.

Thanks

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

CMS is testing with each business partner of the Federally Facilitated Marketplace (FFM): (1) Issuers; (2) States; and (3) Federal Agencies. The tests are designed to ensure that each partner can connect to the FFM IT systems and exchange data properly to support the actions a consumer takes to enroll in a Qualified Health Plan (QHP) on the FFM or to be transferred to a State for Medicaid/CHIP Enrollment:

- Issuer testing validates that issuers and the FFM can orchestrate the enrollment of consumers into plans on the FFM;
- State testing validates that States and the FFM can transfer consumers between the FFM and States depending on eligibility for the Health Insurance Marketplace or Medicaid/CHIP.
- Federal Agency testing validates that the FFM, through the Data Services Hub (DSH) can exchange the data required for eligibility determinations.

General Testing Approach

- CMS has developed a test plan, schedule, and data for each set of external partners. The test data is designed to test the critical business rules for eligibility determination.
- To prepare for Federal Agency Testing, CMS developed and utilized a Test Harness to simulate responses from the Federal Agencies. This approach allowed CMS to detect and correct software issues in the FFM prior to testing with other Agencies.
- All external partners will begin End to End testing in Mid -August with planned end date of August 31

STATE

- States have been involved in “Wave” Testing since March of 2013. The Wave concept onboards States over 4 successive periods based upon their readiness. The testing objective is to verify the interoperability of State system functionality, hardware and software, and business logic with the Federal Data Services Hub (FDSH). Testing includes scenarios designed for successful responses as well as unsuccessful but valid responses.
- **High level State testing milestones:**
 - October 2012: States began informal testing
 - March 2013 – August 2013: Formal “Wave Testing”
 - Mid-July: Start Account Transfer testing between State Medicaid & CHIP Agencies and the Federal Marketplace
 - Mid-July: All States will begin regression testing
 - Mid-August to August 31: All partner End to End testing
- **Composition of State testing:**
 - Total States Testing with Hub: 46 states (two more States are expected to join testing next week)
 - The 46 States break down into
 - 15 State Based Marketplaces,
 - 13 State Partner Marketplaces, and
 - 18 Federally Facilitated Marketplaces.

- **Results:**
 - Testing progress varies by state, depending on the readiness of the state system. Some states have successfully completed testing on multiple services, while other states are just getting started.
- **Activities for 10/1/13**
 - Complete onboarding and testing of the remaining States
 - Complete Operational Readiness Review (ORR)
 - Receive State tailoring of FFM Modified Adjusted Gross Income (MAGI) rules to support Medicaid eligibility determinations.
 - Determination and approval of advance Cost Sharing Reductions (CSR) estimate required by September 2013
 - Processing of transactional enrollment files (834s) from State Based Marketplaces (SBM) required by October 2013
- **Risks for Day 10/1/13**
 - SBMs are responsible for the readiness of their State Marketplace and CMS cannot support late conversions to the FFM
 - Integrated Medicaid & CHIP eligibility systems may need to utilize FFM if their MAGI eligibility determination functionality is not ready
- **Activities for 1/1/14**
 - States that did not meet Account Transfer readiness by 10/1 will be tested
 - Data exchanges between CMS and SBMs for Federally-administered functions
 - Enrollment reconciliation with SBMs, including Advanced Premium Tax Credit (APTC) and CSR amounts required by December 2013
- **Risks for 1/1/14**
 - States that do not complete their Account Transfer functionality will need to utilize alternate methods for transferring individuals

FEDERAL

- **High level Federal testing milestones:**
 - October 2012: Testing with IRS started
 - Current: CMS is testing with Medicare, IRS, SSA, DHS, Peace Corps and OPM
 - 8/15: Federal Agencies will begin participation in End to End testing on 8/15
- **Activities for Day 1**
 - Initiate (and complete) testing with VHA & TRICARE
 - Onboard Federal Agencies into Production environment
- **Risks for Day 1**
 - VHA & TRICARE not ready for Day 1 affecting Minimal Essential Coverage checks

ISSUERS

Eligibility & Enrollment

- CMS worked with Issuers to define test scenarios with the emphasis on the ability to perform Qualified Health Plan (QHP) enrollments. Issuer QHP Enrollment Integration Testing consists of FFM-Initiated Enrollment transaction testing as well as optional Issuer Direct Enrollment processing via web services
- **High level Issuer testing milestones:**
 - June 2013: Testing with Issuers began
 - FFM-Initiated Enrollment Testing
 - Week of 7/15: Engage the first wave of 7 Issuers for functional FFM-Initiated Enrollment Testing
 - Early August: Engage the second wave of Issuers with approximately 125 participants.
 - Mid-August: Additional testing waves will be conducted every two weeks for FFM-Initiated Enrollment testing leading up to the October 1st go-live for Open Enrollment.
 - Direct Enrollment Integration Testing
 - Week of 7/22: Direct Enrollment Testing starts for all interested Issuers, and will be ongoing throughout the months of August and September.
- **Results**
 - To date, CMS has received 140 approved Issuer Onboarding Forms, covering 600 QHPs.
 - Thus far, CMS has received 80 applications from Issuers wishing to participate in Direct Enrollment.
 - Hub Partner IDs have been created for 33 Issuers; CMS is awaiting response from the remaining 47 Issuers that have applied.
 - 15 Issuers have demonstrated the ability to connect to Hub services to perform Direct Enrollment.
- **Activities for Day 1**
 - Onboard all Issuers with Marketplace QHP
 - Complete planned Direct Enrollments and FFM -Initiated Enrollment testing with every Issuer
- **Risks for Day 1**
 - Issuers not ready for Day 1 affecting Marketplace QHP enrollments
- **Activities for 1/1/14**
 - After Enrollment Integration Testing, CMS will continue to test new functionality with Issuers, such as Enrollment Reconciliation and EDI Payment Remittance, which are required by January 1, 2014.
 - First payment due to Issuers required by January 2014
 - Commence issuer edge server processing for claims/enrollee data required by January 2014

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Saturday, July 13, 2013 10:05 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Bowen, Marianne (CMS/OA)
Subject: Re: Testing information

Todd Coutts sent me the descriptions of the readiness reviews and we were checking with Marianne to see if she had anything to add, but here it is without Marianne's additions.

CMS is performing a series of IT Readiness Reviews designed to ensure that the Federally Facilitated Marketplace (FFM) IT systems are prepared to support Open Enrollment on October 1 and the beginning of payments in January 2014. The Reviews include all relevant contractor and Federal teams. To ensure that the Reviews cover the multiple aspects of IT readiness, we have organized the reviews into several components.

1. A **functional walkthrough** that focuses on the IT capabilities required to support the actions that a consumer will take to enroll through the Health Insurance Marketplace. These Reviews will inspect the IT capabilities required to facilitate two primary activities: (1) enrolling a consumer into a Qualified Health Plan (QHP) on the FFM or (2) transferring a consumer to a State Medicaid Agency for Medicaid/CHIP enrollment. IT capabilities include Healthcare.gov website functionality, eligibility determinations based on Federal data sources (transmitted via the Data Services Hub), etc.
2. The **IT processes and infrastructure** reviews will examine the following four elements of the FFM IT systems:
 - Security - The IT security review will ensure that the systems include the proper Federal security and privacy controls to protect sensitive data (e.g. FISMA, HIPAA, etc);
 - Operations - The IT operations review will verify that the necessary human and technical resources will be prepared to run the systems on a daily basis. We will include a review of the help desk operations required to provide effective and efficient customer service for consumers and other business partners;
 - Infrastructure - The infrastructure portion of the review will focus on the hardware, software, and network capacity of the FFM IT systems. The goal of the infrastructure review is to ensure the availability and performance of the systems; and
 - Tactical Deployment - Finally, we will review the plan for the "go-live" event. This review will walk through the checklists and tasks to "turn on" the system to make it available to the public and finalize the connections to Federal and State partners.
3. The **external partner** review will focus on the interaction with the FFM's business partners: i.e. Issuers, States, and Federal Agencies. We will assess the status of agreements with each partner, the readiness of each external partner to engage in IT interactions with the Marketplace, and the plan for coordinated business and IT operations.

Each review includes a detailed assessment of status and results in an actionable follow up plan to address risks and focus our implementation efforts and resources.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Todd Park <[REDACTED]>
Date: Sun, 14 Jul 2013 01:03:31 +0000
To: HENRY CHAO <[REDACTED]>
Cc: Michelle Snyder <[REDACTED]>
Subject: Re: Testing information

Henry, thanks so much, will read this tonight! I think you were also going to send the 9 questions + a couple of bullets describing (at a high level) the readiness review process?

Thanks! Will send you and Michelle a draft document tomorrow.

Cheers,
Todd

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Saturday, July 13, 2013 08:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) <[REDACTED]>
Subject: Testing information

Attached is the requested information you asked for on testing.

Let me know if you need anything else.

Thanks

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Monday, July 15, 2013 2:12 PM
To: Snyder, Michelle (CMS/OA); Park, Todd
Subject: RE: Draft write-up
Attachments: DRAFT summary write-up with Henry Changes.docx

Importance: High

Here are my changes

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Snyder, Michelle (CMS/OA)
Sent: Monday, July 15, 2013 1:54 PM
To: 'Todd Y Park [REDACTED]'; Chao, Henry (CMS/OIS)
Subject: Re: Draft write-up

Looks good

Readiness reviews will continue throughout december as functions evolve and change. Henry is figuring out frequency by function so defer to him

Also - the 9th question on SHOP needs revisited given recent decisions. We left it on as a placeholder. For your backpocket the 9 questions map to over 90 plus data sources and items. Also - the front end guys - training and consumer assistance is underway and will be eventually subsumed into a management information dashboard

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Monday, July 15, 2013 12:02 PM
To: Chao, Henry (CMS/OIS); Snyder, Michelle (CMS/OA)
Subject: Draft write-up

Hi Henry and Michelle, here's the draft write-up for the 4:30 meeting this afternoon am keeping it high-level, as you'll see.... Any and all edits would be greatly appreciated! Henry, I'll connect with you at 2:15 pm, thanks!

DRAFT, PRE-DECISIONAL, AND CONFIDENTIAL

MARKETPLACE IT CHECK-IN SUMMARY

- FFM and Hub IT is on track to be up and running for October 1 go -live
 - Need to continue to hold the line with respect to lockdown of business requirements and enforcing that no changes can be made without extreme risk to schedule and delivery by October 1 and January 1.
 - Readiness reviews (by Functional areas like Eligibility & Enrollment and Operational areas such as Connectivity & Testing) are being executed nearly every week from now through October 1 and January 1. will enable identification and resolution of issues based on comprehensive walk-throughs
 - Testing of data flows between Hub and the Federal Agencies (IRS, SSA, DHS, VA, OPM, CMS/Medicare, Peace Corps) is far along., Testing is in mid-process with States, and in the early stages with Issuers.
 - Need for CMS tech/ops leads to interact with Issuer tech/ops leads on a free flowing, on-demand basis to ensure flexibility and responsiveness in focusing on results
 - End-to-end testing with all partners planned for August 15 to 31
 - Post October 1, development and testing work will continue at high-intensity on additional FFM modules required to support financial management/plan payment to support the beginning of payments to Issuers in Jan 2014
- As with any large-scale new program launch, there will be glitches and issues on and after go-live. CMS has stood up and is in the process of operationalizing a Marketplace Operations Center that will monitor Marketplace operations and systems and lead rapid -responses to issues as they arise. It will be important to ensure that the Center is fully staffed with both dedicated technical and business staff.
 - As with any new operations at this scale the issues need time for analysis before executing fixes and alternate processes DO NOT PANIC!
- It will be critical to tightly manage the flow and approval of QHP data over the next two months
 - State DOI approval of plans and all data to CMS for validation : 7/31
 - Beginning 8/1: Issuers review plans via Plan Compare view
 - CMS does final QA of plans
 - 9/7: Plans are certified and scheduled to be displayed
- State-Based Marketplaces
 - Important to stick with “pivot” decision -making deadline and clearly communicate to SBMs that they are accountable for bringing their marketplaces live. (FFM will not be able to backfill for

them at the last second). There's no room in the schedule or resources to shift if any part of the "pivot" decision gets reworked, modified, amended, changed, even on a small scale like website changes

- Consumer experience will vary from SBM to SBM based on their individual design decisions and execution completely intended to be in the states' domain
- CMS is prepping the systems capabilities to answer 9 essential FFM questions post-go-live:
 - How many consumer applications?
 - How many consumer eligibility determinations?
 - How many consumer enrollments into QHPs?
 - How much are consumer premiums?
 - How many consumers are receiving financial assistance?
 - How many consumer health plan choices?
 - How are consumers using assistance channels?
 - How are CMS Marketplace operations performing?
 - How many employers and employees are served by SHOP?

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Monday, July 15, 2013 4:28 PM
To: Park, Todd; Snyder, Michelle (CMS/OA)
Subject: RE: Draft write-up

Importance: High

Just caught an important distinction to be made...

-- 9/7: Plans are certified and scheduled to be displayed

I think the "displayed" is internal cross checking and not consumer facing. Consumer facing is 10/1.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Park, Todd [mailto:[REDACTED]]
Sent: Monday, July 15, 2013 4:25 PM
To: Chao, Henry (CMS/OIS); Snyder, Michelle (CMS/OA)
Subject: RE: Draft write-up

Final version for the 4:30 attached please keep very close hold. I am bringing hard copies only to the 4:30 meeting. Thanks!

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Monday, July 15, 2013 2:12 PM
To: Snyder, Michelle (CMS/OA); Park, Todd
Subject: RE: Draft write-up
Importance: High

Here are my changes

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Snyder, Michelle (CMS/OA)
Sent: Monday, July 15, 2013 1:54 PM

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Tuesday, July 16, 2013 5:53 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian
Subject: Re: Two quick things

We are in a hearing tomorrow and will not be able to comment until the afternoon at the earliest

We need to talk abt attendance at readiness reviews. I am sure you can anticipate my position on that
Flies on the wall are seldom invisible and often distracting!!!!

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, July 16, 2013 05:44 PM
To: Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian <[REDACTED]>
Subject: Two quick things

Hi Marilyn, Aryana, Michelle, and Henry! Two quick items:

1. I will be working on and sending you draft slides [REDACTED] tonight they will basically be a Powerpoint-ized version of the Word document we reviewed. If you could get me any comments by noon tomorrow, that would be terrific would like at that point to send the slides to Mark/Jeanne for their review
2. I am very much looking forward to being a fly on the wall at the E&E readiness review on the 19th I'll be able to attend from 11 am to 4 pm. (a) Is this still happening on the 19th? (b) Will this include a walkthrough of the FFM web workflow, including Plan Compare? The reason I ask is that David Simas is very interested in being a fly on the wall for a walkthrough of the FFM web workflow, and also would love to soak up a sense of the underlying complexity of the overall Mktplace machine. If the 19th will include a walkthrough of the FFM web workflow, then wanted to ask if David could come with me (for some or all of the time) he would really appreciate the opportunity, and/but also doesn't want to disrupt things in any way.... (FYI, I've briefed him in detail about the fact that we've locked down business requirements and are in pure operational execution mode for Oct 1/Jan 1). Thoughts?

Thank you!
Todd

To: Todd Y Park [redacted]; Chao, Henry (CMS/OIS)
Subject: Re: Draft write-up

Looks good

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Also - the 9th question on SHOP needs revisited given recent decisions. We left it on as a placeholder. For you r backpocket the 9 questions map to over 90 plus data sources and items. Also - the front end guys - training and consumer assistance is underway and will be eventually subsumed into a management information dashboard

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Sent: Monday, July 15, 2013 12:02 PM
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From: Park, Todd
Sent: Wednesday, July 17, 2013 12:33 AM
To: 'Michelle.Snyder [REDACTED]'; 'Marilyn.Tavenner [REDACTED]'; 'Aryana.Khalid [REDACTED]'; 'henry.chao [REDACTED]'
Cc: Graubard, Vivian
Subject: RE: Two quick things
Attachments: IT slide v1.pptx

Hi team, draft slide enclosed (hews closely to the Word document) any edits by 4 pm tomorrow (Wednesday) would be hugely appreciated, thanks!

From: Park, Todd
Sent: Tuesday, July 16, 2013 7:10 PM
To: 'Michelle.Snyder [REDACTED]'; 'Marilyn.Tavenner [REDACTED]'; 'Aryana.Khalid [REDACTED]'; 'henry.chao [REDACTED]'
Cc: Graubard, Vivian
Subject: Re: Two quick things

OK, no problem -- it looks like I only need to put together one slide, and it will adhere tightly to and simply summarize the points in the Word doc. Will send the slide to you tonight -- if you could send me any edits by 4 pm tomorrow, that would be great; draft slides are being circulated to Deputies for comment at 5 pm. (It will take you 5 min to read the slide)

And I/David won't come to the readiness reviews -- don't want to distract or disrupt, which upon reflection I suspect would happen even if we didn't say a single thing.

(Will follow up later about a possible focused briefing session for David and me in Baltimore that happens at the appropriate moment)

May the Force be with you in the hearing tomorrow,

Todd

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Tuesday, July 16, 2013 05:53 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA) <[REDACTED]>; Khalid, Aryana C. (CMS/OA) <[REDACTED]>; Chao, Henry (CMS/OIS) <[REDACTED]>
Cc: Graubard, Vivian
Subject: Re: Two quick things

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Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:]
Sent: Tuesday, July 16, 2013 05:44 PM
To: Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian < >
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Thank you!
Todd

Marketplace IT Status Summary

- **Federally Facilitated Marketplace and Data Hub IT are on track to be up and running for October 1 go-live**
 - Need to continue to hold the line with respect to lockdown of business requirements
 - Readiness reviews by functional area are being executed nearly every week from now through Oct 1 and Jan 1, enabling identification and resolution of issues
 - Testing of data flows among Federal agencies is far along, is in mid -process with States, and is in the early stages with Issuers. End -to-end testing with all partners is planned for Aug 15-31
 - Post Oct 1, development and testing work will continue at high intensity on additional FFM modules required to support financial mgmt/plan payment beginning Jan 2014
- **As with any large-scale new program launch, there will be a stream of issues on and after go-live** – CMS is standing up a **Marketplace Operations Center** to monitor operations and systems and lead rapid response to issues as they arise
- **Will be critical to tightly manage the flow and approval of Qualified Health Plan data over the next two months** – i.e., State Department of Insurance approval of plans (7/31), Issuer review of their plans via FFM Plan Compare view (beginning 8/1), CMS review, final certification of plans for display (9/7)
- **State-Based Marketplaces** – need SBMs to understand unequivocally that they are accountable for bringing live Marketplaces in their states by Oct 1 (FFM cannot backfill at the last second)

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Wednesday, July 17, 2013 5:05 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian
Subject: Re: Two quick things

Sorry. Just got off the hill. Slide looks fine. No edits.

Thanks

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, July 17, 2013 12:33 AM
To: Snyder, Michelle (CMS/OA); Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian <[REDACTED]>
Subject: RE: Two quick things

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Cc: Graubard, Vivian
Subject: Re: Two quick things

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And I/David won't come to the readiness reviews -- don't want to distract or disrupt, which upon reflection I suspect would happen even if we didn't say a single thing.

(Will follow up later about a possible focused briefing session for David and me in Baltimore that happens at the appropriate moment)

May the Force be with you in the hearing tomorrow,

Todd

From: Allen, Jessica
Sent: Monday, July 08, 2013 06:01 PM
To: DL-WHO-Press
Subject: NYT: 10 Questions for Obama's Chief Technology Officer

<http://thecaucus.blogs.nytimes.com/2013/07/08/10-questions-for-obamas-chief-technology-officer/?src=twr>

July 8, 2013, 5:48 pm

10 Questions for Obama's Chief Technology Officer

By JOHN HARWOOD

VIDEO

Todd Park, a former Silicon Valley entrepreneur, serves as President Obama's chief technology officer. His role has taken on heightened importance after several recent developments, including the implementation of the new health care law, efforts to reduce the backlog in Department of Veterans Affairs claims processing, and privacy issues raised by disclosures about data collection by the National Security Agency. Mr. Park spoke with John Harwood of The Times and CNBC at the White House as Mr. Obama publicly challenged his administration to improve the government's innovation and efficiency in his second term.

What follows is a condensed, edited account of their conversation.

Q.

Government has a reputation for being clunky, slow, inefficient. What do you think you have been able to accomplish?

A.

There are phenomenal people harnessing the power of tech and innovation to help government work better, cost less and help grow the economy. For example, in the recent Hurricane Sandy and Oklahoma tornado response, FEMA has

harnessed tech in all kinds of ways to deliver better results. To get housing to folks, you used to rely exclusively on the ground inspectors, now we can use satellite and analytics to figure out what areas need help and get help faster. In addition, a majority of folks who registered for disaster aid post-Sandy were able to do so via mobile phone or Internet. Even when folks didn't have access, FEMA inspectors came back with iPads to actually register them for aid.

Another example: I was recently traveling with the president to Austin, where he launched a new executive order that opens up tons of government data—everything from health and medicine and science to safety and more—as machine-readable, free fuel for entrepreneurs to tap to create new companies and jobs. The president's attitude is, this is America's data. All kinds of entrepreneurs are picking up that data to help grow the economy.

Q.

Possibly the biggest thing the government has going right now is trying to implement the health care law. The administration announced a delay in the employer mandate; they couldn't get it done in time. What does that tell you about the limits of technology in making it work more rapidly and efficiently?

A.

The president is really focused on implementing the law very well. Business expressed concern that there are issues to be worked through, so it was a sensible thing to do to say, "O.K., let's work through those issues." Oct. 1, we'll be bringing live the new health marketplaces. Things are on track to make that happen. There is a whole team at the U.S. Department of Health and Human Services working incredibly hard, night and day, on bringing out these new health marketplaces. We have actually done a huge amount of user testing on it to make sure the Web site is as user-friendly as possible. The prototypes are incredibly impressive.

Q.

No doubt they'll be up and running in October?

A.

They'll be up and running Oct. 1.

Q.

Let me ask you about the culture of Washington. It has a reputation as being the opposite of the Silicon Valley culture in terms of agility and decision-making, flexibility, innovation. What have you found?

A.

I have actually found a lot more similarities than you might expect. Whenever the president gives us a mission to harness tech innovation and get something done for the American people, in terms of growing the economy and improving health care, we go find the folks across government who have been dreaming about that for a really long time. They're out there, they're incredibly talented innovators. We team them together into what we call a virtual start-up that's running inside the government, to move Silicon Valley speed to get stuff done. When you have the air cover like President Obama, who is deeply passionate about harnessing innovation and tech, it is possible for these focused teams to get a lot done in a short period of time. It's hard to actually build anything new, but it turns out if you apply a lot of the same techniques that make Silicon Valley companies successful to internally change parts of the government, they definitely work.

Q.

Talk about how those virtual start-ups work, and how many are there?

A.

The way they operate is modeled on a philosophy called "lean start-up," which was popularized recently by Eric Ries. You want to build small, interdisciplinary, agile teams that have strategy, policy, ops and tech all represented in one team, all working to solve one problem. Secondly, there's an emphasis on rapid prototype. You don't think aircraft carrier, you think rowboat - the smallest possible thing I can deliver to my actual customer as early as possible, so they can actually start getting their engagement. The third principle is rapid iteration - iterate that product at high speeds with versions released every few days or every few weeks, instead of every few months or years, so you maximize the learning. So from the ground up, you eventually get to a real understanding of what the customer wanted and how to create something that delivers that. So that's the model that we've been adopting.

There are about 15 or so that I personally oversee. But this is actually a model that's been cloned across the government. The key is that we have an idea, we find the three or five people initially that had the idea a long time ago or had a similar idea across the government, put them together in this lean start-up team, liberate them to actually operate, give them the air coverage to do so, and they rock 'n' roll from there.

Q.

One of the innovations the president is going to talk about is something called Blue Button at the Department of Veterans Affairs to help people get their medical records quickly. The department has gotten a reputation for the very slow process of handling disability claims, and it has gotten mocked for stacks of paper records. So why shouldn't the average person say, "Great, Blue Button is fantastic, but you have such a bigger problem than that and you aren't making much headway?"

A.

The backlog issue, as you know, is one that the administration inherited. The administration, on top of that, passed a whole set of rules that expand eligibility and increase the number of claims. There is an unprecedented, governmentwide effort that is pretty amazing to take that problem out, to take the whole backlog problem out - to apply technology and process change. We're actually beginning to see the progress of the backlog beginning to come down at a growing clip, and we think we're going to be able to meet our goals there. The president has made it super clear that this is a top, major priority. There's a huge team, a cross-agency team, a cross-government team that's actually working very hard at this complex problem and taking it out.

Q.

You did consulting for Booz Allen Hamilton, the firm that employed the National Security Agency leaker Edward J. Snowden. What is your concern in regard to privacy with government technology and the centralization of information?

A.

It's incredibly important to protect personal privacy, and it's something that the administration has been championing from the very beginning, advocating for consumer privacy bill of rights and making sure we build privacy protections into the Affordable Care Act and lots of different venues of activity. I think a lot has been accomplished there. I think it's important to stay abreast of the continuing trends, and to make sure that we are tracking with those trends and ensuring that consumer privacy is protected everywhere possible.

Q.

What's a reasonable way of looking at the success of the open-data policy that the president implemented? How quickly will we see results from that?

A.

That's something actually that we've been working on since the president's first day in office, when he submitted his open-government memorandum. There's over 75,000 data sets on data.gov already, everything from daily hospital charges for different procedures across the country, to credit card complaints, account affordability, weather, climate, and so forth. So there's a bunch of data that's already been out there, and a bunch of data that has been downloaded and used by companies like [Opower](http://Opower.com), which is a start-up that uses government energy trends and weather data to help consumers save money on their energy bills. Companies like [iTriage](http://iTriage.com), which was started a couple of years ago from a couple of emergency room doctors from Denver, that used downloaded data from the Department of Health and Human Services to help you use on a mobile app, based on what's wrong with you, to get the best local doctors and hospitals to help you. What the executive order does is it says, going forward as a new default, all new or modernized government resources should be made open and machine-readable while protecting privacy and national security, which turbocharges the number of data sets on data.gov, and therefore turbocharges the new company creation and job creation that results.

Q.

Do you feel, as a Silicon Valley guy that has started companies, like a fish out of water in Washington?

A.

A lot of people ask me that question, a lot of my friends back home. It's been the most amazing entrepreneurial experience I've ever had. The opportunity you have here to work with teams that are making changes happen at scale is quite extraordinary. The impact you can have is mass times velocity. If you take an opportunity like this, with the scale of opportunity for change that it has, and combine it with the ability to do lean start-up with air cover of the president to make change happen rapidly, that mass times velocity equation is going to have an impact.

Q.

I thought Washington was all mass and no velocity.

A.

It's interesting. It turns out that it can have velocity on innovation ambitions, if you have a president that cares about that.

Transcribed by Katherine L. Kreider

From: Wallace, Mary H. (CMS/OC) <[REDACTED]>
Sent: Saturday, June 29, 2013 10:33 AM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Booth, Jon G. (CMS/OC)
Subject: RE: Follow-up

Todd,

Just to follow up on what Henry flagged with IDEO. We can talk about this more, but I think the real concern is to not have contractors trying to interpret what they think you or others from HHS or the White House asked them to do. The biggest help would be for all of you to carry the message that the best thing IDEO (or any contractor) can do is what CMS is asking them to do. In IDEO's case this is Jon Booth's team giving them direction.

We have a lot of contractors supporting t his effort and we are working hard to keep them all on the right track to get everything done in time.

Thanks

Mary

From: Park, Todd [REDACTED]
Sent: Saturday, June 29, 2013 9:26 AM
To: Chao, Henry (CMS/OIS)
Cc: Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: Re: Follow-up

Will work on making both of these things happen as you've requested and report back!

From: Chao, Henry (CMS/OIS) [[mailto:\[REDACTED\]](mailto:[REDACTED])]
Sent: Saturday, June 29, 2013 09:07 AM
To: Park, Todd
Cc: Wallace, Mary H. (CMS/OC) <[REDACTED]>; Booth, Jon G. (CMS/OC) <[REDACTED]>
Subject: Re: Follow-up

Todd,

I talked to Michelle and she would like for the follow -up to just be with you.

Also I wanted to talk to you about a meeting you had with Ideo. Apparently something was misinterpreted from what you said and the top dog you met with circled back to OC (since they are one of the contractors in the mix) and started to work on an alternate rendering of the paper form as if they were instructed to follow a different set of requirements. This is a pretty big issue since Ideo does not get to change requirements and scope without it coming from CMS directly. If there's anything you can do to help clear this up we would greatly appreciate it, or rather the program would appreciate it since it will hold the line on confusion and risk.

Thanks.

Henry Chao

Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Park, Todd [mailto:]
Sent: Thursday, June 27, 2013 12:26 AM
To: Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian < >; VanRoekel, Steven < >;
Lynch, Laura < >
Subject: RE: Follow-up

Hi Henry, I'd love to try Tuesday, July 9, 4 pm to 8 pm+. Looping Steve and Laura Steve would like to come, too! (Steve, this is the Marketplace IT and testing deep -dive we discussed). Steve, can you make this time?

Viv, if Steve can make this time, let's book it. We should also invite Bryan Sivak and Frank Baitman, if they would like to attend. I'll bring enough carrots, ginger beer, pita bread, and hummus for everybody ☺

Thanks, Henry!
Todd

From: Chao, Henry (CMS/OIS) [mailto:]
Sent: Wednesday, June 26, 2013 11:16 PM
To: Park, Todd
Cc: Graubard, Vivian
Subject: Re: Follow-up

Todd,

For planning purposes I am blocking the following dates and times. Let me know which works for you. Thanks!

Monday July 8 5pm to at least 9pm
Tuesday July 9 4pm to at least 8pm
Monday July 15 5pm to at least 9pm
Tuesday July 16 4pm to at least 8pm

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Park, Todd
Sent: Saturday, June 29, 2013 11:43 AM
To: 'Mary.Wallace [REDACTED]' <[REDACTED]>; 'henry.chao [REDACTED]' <[REDACTED]>
Cc: 'Jon.Booth [REDACTED]' <[REDACTED]>
Subject: Re: Follow-up

Hi Mary, thank you for the flag, will absolutely do!

From: Wallace, Mary H. (CMS/OC) [mailto:[REDACTED]]
Sent: Saturday, June 29, 2013 10:33 AM
To: Park, Todd; Chao, Henry (CMS/OIS) <[REDACTED]>
Cc: Booth, Jon G. (CMS/OC) <[REDACTED]>
Subject: RE: Follow-up

Todd,

Just to follow up on what Henry flagged with IDEO. We can talk about this more, but I think the real concern is to not have contractors trying to interpret what they think you or others from HHS or the White House asked them to do. The biggest help would be for all of you to carry the message that the best thing IDEO (or any contractor) can do is what CMS is asking them to do. In IDEO's case this is Jon Booth's team giving them direction.

We have a lot of contractors supporting this effort and we are working hard to keep them all on the right track to get everything done in time.

Thanks

Mary

From: Park, Todd [REDACTED]
Sent: Saturday, June 29, 2013 9:26 AM
To: Chao, Henry (CMS/OIS)
Cc: Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: Re: Follow-up

Will work on making both of these things happen as you've requested and report back!

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Saturday, June 29, 2013 09:07 AM
To: Park, Todd
Cc: Wallace, Mary H. (CMS/OC) <[REDACTED]>; Booth, Jon G. (CMS/OC) <[REDACTED]>
Subject: Re: Follow-up

Todd,

I talked to Michelle and she would like for the follow -up to just be with you.

Also I wanted to talk to you about a meeting you had with Ideo. Apparently something was misinterpreted from what you said and the top dog you met with circled back to OC (since they are one of the contractors in the mix) and started to work on an alternate rendering of the paper form as if they were instructed to follow a different set of requirements. This is a pretty big issue since Ideo does not get to change requirements and scope without it coming from CMS directly. If there's anything you can do to help clear this up we would greatly appreciate it, or rather the program would

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Saturday, June 29, 2013 4:32 PM
To: Park, Todd; Wallace, Mary H. (CMS/OC)
Cc: Booth, Jon G. (CMS/OC)
Subject: Re: Follow-up

As soon as Vivian confirms your calendar for the 9th (4pm to?) I was going to send Jon and Mary the appointment.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, June 29, 2013 04:23 PM
To: Wallace, Mary H. (CMS/OC); Chao, Henry (CMS/OIS)
Cc: Booth, Jon G. (CMS/OC)
Subject: Re: Follow-up

Hi team, just pinged Team IDEO (including the CEO) and said that they should be sure to follow CMS's lead, and that CMS is the unambiguous operational leader of all of the Marketplace work, in case that wasn't clear :)

The idea related to UX that came up in the discussion with IDEO's CEO was making sure that ideas to optimize language and UX got the right level of air cover on behalf of the user vs. other policy considerations. We (David Simas and I) expressed support for the idea of ensuring there is a clear process to make UX decisions that are user -centric.

But what I've clarified in our follow -up ping is that we are going to circle back with CMS on this (to understand current UX decisionmaking process and if any further support/air cover for user -centric-ness is needed on an ongoing basis).

And again, I emphasized the need for IDEO to listen to CMS for actual direction :)

Henry, perhaps we can touch base about the UX decisionmaking process at our deep dive? Would be wonderful to have Jon and Mary attend for part of that session to discuss the current state of the UX and ongoing process. If any process optimizations might be useful, they may or may not be relevant for Oct 1, but could be useful post Oct 1.

Please let me know if IDEO remains at all confused about things, and many apologies if we created confusion!

Semper fi,
Todd

From: Khalid, Aryana C. (CMS/OA) <[REDACTED]>
Sent: Thursday, September 12, 2013 4:06 PM
To: Tavenner, Marilyn (CMS/OA); Park, Todd
Cc: Snyder, Michelle (CMS/OA)
Subject: RE: Hi Marilyn

Marilyn is exactly right, we need everyone's support right now and we need folks talking to the advocates saying this is a momentous time in our Country's history, b/c it is. We are standing up something that has never been done before and even though some pieces are coming online a little later, what the team is doing is unprecedented. Not even standing up Medicare and Medicaid can compare to this. We need people out there talking to the advocates and asking them to stand up with us and say this is a big deal and there are many ways for folks to apply:

1. Online in English on day 1
2. With an in-person assister on day 1 in various languages
3. With the call center on day 1 in many languages

I know you are trying to help us and we so appreciate it. What we need is folks focusing on what they can do which is the messaging and talking to the advocates; not focusing on the IT or trying to come up with creative solutions to solve this. I hope this makes sense.

Aryana

From: Tavenner, Marilyn (CMS/OA)
Sent: Thursday, September 12, 2013 3:54 PM
To: 'Todd Y Park' [REDACTED]
Cc: Snyder, Michelle (CMS/OA); Khalid, Aryana C. (CMS/OA)
Subject: Re: Hi Marilyn

Yes but go through Michelle first. I am copying her and Aryana. Michelle I had explained to Todd -who was asking gently what the issues were. I told him band width primary so we can not get there by 10/1. Second was implementation risk. Todd I need folks to understand the VERY best way they can help us -is to reach out to the advocates -educate them and garner their energy/support. We have the same issues within Medicaid(meaning functionality coming up in stages)and I have sent Cindy and Andy Schneider to work with advocates. Thanks! M.

From: Park, Todd [mailto:[REDACTED]]
Sent: Thursday, September 12, 2013 03:38 PM
To: Tavenner, Marilyn (CMS/OA)
Subject: RE: Hi Marilyn

I know you do :) To help with internal understanding here at the WH (and therefore with mobilizing energy and help for external messaging!), would you mind if I got on the phone with Henry for 5 min to get a quick download on the tech details? It makes a lot of intuitive sense that sequencing would be much safer it would help if I were armed with a bit more tech detail....

From: Tavenner, Marilyn (CMS/OA) [mailto:[REDACTED]]
Sent: Thursday, September 12, 2013 3:30 PM
To: Park, Todd
Subject: Re: Hi Marilyn

And I say it with love.

From: Park, Todd [mailto: [REDACTED]]
Sent: Thursday, September 12, 2013 03:13 PM
To: Tavenner, Marilyn (CMS/OA)
Subject: Hi Marilyn

Hi Marilyn, hope all is terrific with you as we enter the home stretch on the road to October 1! [REDACTED] everyone's hearts and spirits are with you and team!

I understand that you and Chris had a conversation about HC.gov in Spanish in which you underlined the importance of a smooth go-live on October 1 and therefore the need to push HC.gov in Spanish to Oct 15.

Just to emphasize, Chris is supportive of your position, and did not ask me to ping you!

Macon pinged me, and asked what the root of the technical issue was and if a creative solution might be possible. I said that I would check with you ☺ Might you be able to circle back with your tech team on this question? If it would be even remotely helpful, I would be more than happy to join the technical conversation as well.

Thank you and team so very much again for the truly heroic work you are doing. May the Force continue to be with you!

Todd

From: McGuinness, Tara
Sent: Saturday, June 22, 2013 10:24 PM
To: 'julie.bataille [REDACTED]'; 'Bryan.Sivak [REDACTED]'; Park, Todd; Simas, David M.; Lee, Jesse C.
Subject: Re: this is great

Also david, maybe when you and todd are in CA this week, you could do some in -person press meetings.

From: Bataille, Julie (CMS/OC) [mailto:[REDACTED]]
Sent: Saturday, June 22, 2013 10:14 PM
To: McGuinness, Tara; Sivak, Bryan (HHS/IOS) <[REDACTED]>; Park, Todd; Simas, David M.; Lee, Jesse C.
Subject: RE: this is great

There is a blog by Bryan in the works along these lines (Bryan I haven't seen latest version) but assume that could go into an email relatively quickly too --would think we want that timed to code availability, we reference the site in the press release itself. Bryan can make these points at the in person press briefing Monday but since those are really healthcare reporters other calls on these points is probably best to get this story out -am hoping the tech pieces of this will serve as some validation for moving in the right consumer direction as am worried the healthcare folks are likely to be disappointed that the application and plan compare aren't yet live. Let me know what we can do to help.
Julie

From: McGuinness, Tara [REDACTED]
Sent: Saturday, June 22, 2013 10:05 PM
To: Sivak, Bryan (HHS/IOS); Park, Todd; Simas, David M.; Bataille, Julie (CMS/ OC); Lee, Jesse C.
Subject: Re: this is great

+julie and jesse

In addition to a tech press push and some mainstream folks who like to write about this, we should have an email drafted (bryan can you do that) that lays out what we are doing and hyperlinks to more interesting parts of the site and to this piece- this could go to tech elites on monday. I have some ideas about a list of folks who should receive such an email, but you all might have more.

Todd, do you have a list like that? I am on a techie -organizer google group. I can also check with OPE. I might actually be better coming from an outside validator than us.

-tara

From: Sivak, Bryan (HHS/IOS) [mailto:[REDACTED]]
Sent: Saturday, June 22, 2013 07:51 PM
To: Park, Todd; McGuinness, Tara; Simas, David M.
Subject: Re: this is great

Oh, one other thing: Todd is exactly right -- this is the launch of the the "learn" side, which is the informational, "get prepared" content. The actual marketplace launches (obviously) October 1st, although there will be more functionality added to hc.gov in the interim, such as the ability to create accounts.

On Jun 22, 2013, at 19:14, "Sivak, Bryan (HHS/IOS)" <[REDACTED]> wrote:

Longish story. Alex has been following this since we made the design decisions he describes, roughly six months ago. As I think you guys know, we're in "soft launch" mode this weekend and are encouraging people to hold off on Monday to really "break" the news. Having said that, it's the internet and once something is out there, it's out there.

IMHO, Alex put together a really fantastic piece on the technical side of what we're doing. He nailed the importance not just for hc.gov but for gov't tech in a broader sense. I know he's shopping this piece right now and he told me it might get picked up by one or two larger publications.

There are a few other tech details we're holding back until Monday (for example, the <http://www.healthcare.gov/developers> page), which I'm planning on talking to a few other outlets on Monday about once we're in official launch mode. I assume you guys have connections at fairly high levels, so if you want to put me in touch with people, I'm happy to talk today/tomorrow for a Monday publication, or on Monday whenever.

To answer the specific question about code and availability -- we are going to publish the code this week (maybe Monday along with the official launch if everything works out). If you take a look at the /developers page you'll see that we have detailed the programmatic mechanisms for accessing content, but have a "coming soon" where the links to the GitHub repos are.

Happy to answer any other questions. This is a paradigm shift for the federal government and the fact that it's happening on healthcare.gov is a really big deal for the tech community.

Bryan

From: Park, Todd [REDACTED]
Sent: Saturday, June 22, 2013 7:01 PM
To: McGuinness, Tara; Simas, David M.
Cc: Sivak, Bryan (HHS/IOS)
Subject: Re: this is great

Looping Bryan -- I believe what Alex Howard is discussing in this (great) piece is the new HealthCare.gov content site, which is up and running, and for which the code has been posted on Github (an online repository for open source code). The content site will front-end the Marketplace -- but the actual Marketplace eligibility-checking/enrollment/plan comparison functionality is not up yet. Bryan, can you confirm/elaborate? Thanks!

Todd

From: McGuinness, Tara
Sent: Saturday, June 22, 2013 06:08 PM
To: Simas, David M.; Park, Todd
Subject: Re: this is great

Yes. Good idea. Interesting -- they found this up. No other reporters have found it. I'll connect w. folks about a push. Todd, I thought all the code was going up later, not now, am I wrong about that?

From: Simas, David M.
Sent: Saturday, June 22, 2013 04:39 PM
To: McGuinness, Tara; Park, Todd
Subject: this is great

Would be good if other tech related pubs write something good about this.

From: Bataille, Julie (CMS/OC) <julie.bataille [REDACTED]>
Sent: Saturday, June 22, 2013 10:14 PM
To: McGuinness, Tara; Sivak, Bryan (HHS/IOS); Park, Todd; Simas, David M.; Lee, Jesse C.
Subject: RE: this is great

There is a blog by Bryan in the works along these lines (Bryan I haven't seen latest version) but assume that could go into an email relatively quickly too --would think we want that timed to code availability, we reference the site in the press release itself. Bryan can make these points at the in person press briefing Monday but since those are really healthcare reporters other calls on these points is probably best to get this story out -am hoping the tech pieces of this will serve as some validation for moving in the right consumer direction as am worried the healthcare folks are likely to be disappointed that the application and plan compare aren't yet live. Let me know what we can do to help.
Julie

From: McGuinness, Tara [Tara D McGuinness [REDACTED]]
Sent: Saturday, June 22, 2013 10:05 PM
To: Sivak, Bryan (HHS/IOS); Park, Todd; Simas, David M.; Bataille, Julie (CMS/OC); Lee, Jesse C.
Subject: Re: this is great

+julie and jesse

In addition to a tech press push and some mainstream folks who like to write about this, we should have an email drafted (bryan can you do that) that lays out what we are doing and hyperlinks to more interesting parts of the site and to this piece- this could go to tech elites on monday. I have some ideas about a list of folks who should receive such an email, but you all might have more.

Todd, do you have a list like that? I am on a techie -organizer google group. I can also check with OP E. I might actually be better coming from an outside validator that us.

-tara

From: Sivak, Bryan (HHS/IOS) [mailto:[REDACTED]]
Sent: Saturday, June 22, 2013 07:51 PM
To: Park, Todd; McGuinness, Tara; Simas, David M.
Subject: Re: this is great

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Happy to answer any other questions. This is a paradigm shift for the federal government and the fact that it's happening on healthcare.gov is a really big deal for the tech community.

Bryan

From: Park, Todd [REDACTED]
Sent: Saturday, June 22, 2013 7:01 PM
To: McGuinness, Tara; Simas, David M.
Cc: Sivak, Bryan (HHS/IOS)
Subject: Re: this is great

Looping Bryan -- I believe what Alex Howard is discussing in this (great) piece is the new HealthCare.gov content site, which is up and running, and for which the code has been posted on Git hub (an online repository for open source code). The content site will front -end the Marketplace -- but the actual Marketplace eligibility-checking/enrollment/plan compare functionality is not up yet. Bryan, can you confirm/elaborate? Thanks!

Todd

From: McGuinness, Tara
Sent: Saturday, June 22, 2013 06:08 PM
To: Simas, David M.; Park, Todd
Subject: Re: this is great

[REDACTED]

From: Simas, David M.
Sent: Saturday, June 22, 2013 04:39 PM
To: McGuinness, Tara; Park, Todd
Subject: this is great

[REDACTED]

From: Sivak, Bryan (HHS/IOS) <[REDACTED]>
Sent: Saturday, June 22, 2013 11:28 PM
To: Bataille, Julie (CMS/OC); McGuinness, Tara; Park, Todd; Simas, David M.; Lee, Jesse C.
Subject: RE: this is great
Attachments: launchblogdraft-acCS06212013 - bds-ac.docx

Here's the latest version of the blog post. Veronica Jackson in ASPA has it and is planning on sending it out through the regular HHS clearance process next week -- the thought was to do the currently planned campaign with traditional press on Monday (and Tuesday for the spanish site) and then a day or two later drop this for an additional press hit. Just FYI, there are a couple of things that will probably change slightly with the attached (I think we have better pics of the design team, as an example) but the majority of the content and the structure will remain the same.

I'm happy to work this into an email format for tech elites if you guys want to send something out on Monday. Tara, I know most of the people on that Google group pretty well and can connect directly with them, but keep in mind they're primarily going to be social media amplifiers as opposed to traditional media or web publications.

I was planning on reaching out to some of the tech world publications (TechCrunch, GigaOm, Wired, etc) on Monday post-launch to pitch the story. Happy to coordinate with any other outreach, though.

Todd, David -- let me know who you are going to see in CA, if anyone, and what detail you need. Some of the usual suspects will already have some info but maybe it's worth hopping on a quick call to discuss.

Bryan

From: Bataille, Julie (CMS/OC)
Sent: Saturday, June 22, 2013 10:14 PM
To: McGuinness, Tara; Sivak, Bryan (HHS/IOS); Park, Todd; Simas, David M.; Lee, Jesse C.
Subject: RE: this is great

There is a blog by Bryan in the works along these lines (Bryan I haven't seen latest version) but assume that could go into an email relatively quickly too --would think we want that timed to code availability, we reference the site in the press release itself. Bryan can make these points at the in person press briefing Monday but since those are really healthcare reporters other calls on these points is probably best to get this story out -am hoping the tech pieces of this will serve as some validation for moving in the right consumer direction as am worried the healthcare folks are likely to be disappointed that the application and plan compare aren't yet live. Let me know what we can do to help.
Julie

From: McGuinness, Tara [REDACTED]
Sent: Saturday, June 22, 2013 10:05 PM
To: Sivak, Bryan (HHS/IOS); Park, Todd; Simas, David M.; Bataille, Julie (CMS/OC); Lee, Jesse C.
Subject: Re: this is great

+julie and jesse

In addition to a tech press push and some mainstream folks who like to write about this, we should have an email drafted (bryan can you do that) that lays out what we are doing and hyperlinks to more interesting parts of the site and to this piece- this could go to tech elites on monday. I have some ideas about a list of folks who should receive such an email, but you all might have more.

Todd, do you have a list like that? I am on a techie-organizer google group. I can also check with OPE. I might actually be better coming from an outside validator that us.

From:
Sent:
To:
Subject:
Attachments:

From: [Redacted]
Sent: Saturday, June 22, 2013 11:18 AM
To: [Redacted]
Subject: RE: this is great
Attachments: [Redacted]

I've the latest version of the last part... Version Jackson is ALFA and is planning on sending it out through the regular clearance process next week - the thought was to do the currently planned campaign with the national press on Monday (and Tuesday for the special one) and then a day or two later (but this for an additional press hit) but I think there are a couple of things that will probably be a little bit off (I think we have better bits of the design team as an example) but the majority of the content and the structure will remain the same.

I'm happy to work this into an email format for fact sheets if you guys want to send something out on Monday. I know most of the people on that Google group pretty well and can contact directly with them but keep in mind they're generally going to be social media influencers as opposed to traditional media or web publications.

I was planning on reaching out to some of the fact sheet publications (Factunch, @Gator, What's etc) on Monday but haven't been the story - happy to coordinate with any other outreach, though.

John David - let me know who you are going to see in CA, if anyone, and what date is you need. Some of the usual suspects will already have some info but maybe it's worth hoping on a quick call to discuss.

Byron

From: [Redacted]
Sent: Saturday, June 22, 2013 10:14 PM
To: [Redacted]
Subject: RE: this is great

There's a good bit of work in the works along these lines (I haven't seen that yet) but assume that could go into an email relatively quickly for the work that we want to do in order to make sure we're in the best position to go. Byron can make these calls if the person gives them a Monday but since they're really healthcare related, they'll probably be out of the story but get the story out - and having the fact sheets of the will save us some headache for moving in the right direction as we would the headline take - and they'll be disappointed that the opposition and put together. And if we know what we can do to help.

John

From: [Redacted]
Sent: Saturday, June 22, 2013 10:12 PM
To: [Redacted]
Subject: RE: this is great

In addition to a fact sheet and some mainstream folks who like to write about this, we should have an email drafted (Byron can you do that) that says out what we are doing and highlights to more interesting parts of the site and to the press - this could go for fact sheet on Monday. I have some ideas about a lot of folks who should receive a copy but you'll have to figure out who you'll have more. For it, do you have a list of the fact sheet group? I can do a little outreach group. I can also check with DPA, might actually be better coming from an outside vendor that we

From: Sivak, Bryan (HHS/IOS) <[REDACTED]>
Sent: Monday, July 01, 2013 1:56 PM
To: Snyder, Michelle (CMS/OA)
Cc: Bataille, Julie (CMS/OC); Chao, Henry (CMS/OIS); Booth, Jon G. (CMS/OC); Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC); Park, Todd; Baitman, Frank (OS/ASA/OCIO); Monteleone, Timothy (OS/ASA); Bowen, Marianne (CMS/OA); Armstead, Andrea E. (CMS/OA); Kerr, James T. (CMS/CMHPO); Khalid, Aryana C. (CMS/OA); Boulanger, Jennifer L. (CMS)
Subject: Re: HealthCare.gov Open Source Release

I am more than happy to be point on this for any inquires from the Hill. Feel free to send them my way.

Bryan

On Jul 1, 2013, at 15:42, "Snyder, Michelle (CMS/OA)" <[REDACTED]> wrote:

We are getting lots of questions about privacy, program integrity etc from the Hill. We need some q's and a's on this.....believe me the questions will be asked. If there had been a broad discussion about this I doubt that we would have agreed to impleme nt quite this way. Who owns the story line on this? Copied Jennifer OL needs to be in the loop going forward given all the activity on the HUB and Marketplace front.

Michelle

A.Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

From: Bataille, Julie (CMS/OC)
Sent: Saturday, June 29, 2013 7:19 AM
To: Chao, Henry (CMS/OIS); Booth, Jon G. (CMS/OC); Sivak, Bryan (HHS/IOS)
Cc: Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC); 'Todd Y Park [REDACTED]'; Baitman, Frank (OS/ASA/OCIO); Monteleone, Timothy (OS/ASA); Bowen, Marianne (CMS/OA); Snyder, Michelle (CMS/OA); Armstead, Andrea E. (CMS/OA); Kerr, James T. (CMS/CMHPO); Khalid, Aryana C. (CMS/OA)
Subject: Re: [HealthCare.gov](#) Open Source Release

Henry. We share the concerns and are trying to balance many interests as well. We are excited to be at this point. We should put this on the agenda for marilyn's o ps meeting as well I think and have added aryanas as well.

From: Chao, Henry (CMS/OIS)
Sent: Friday, June 28, 2013 10:11 PM
To: Booth, Jon G. (CMS/OC); Sivak, Bryan (HHS/IOS); Bataille, Julie (CMS/OC)
Cc: Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC); 'Todd Y Park [REDACTED] <[REDACTED]>'; Baitman, Frank (OS/ASA/OCIO); Monteleone, Timothy (OS/ASA); Bowen, Marianne (CMS/OA); Snyder, Michelle (CMS/OA); Armstead, Andrea E. (CMS/OA); Kerr, James T. (CMS/CMHPO)

Subject: Re: HealthCare.gov Open Source Release

I want to express my reservations about putting nearly all the source code for the hc.gov/Marketplace Portal Website on Github and making it available for absolutely anyone in the entire world to use. While in its current state it does not contain the code for the Online Application, someone with less than honorable intentions can easily stand up a shadow site that would fake out the general public and they can do it easily and literally in just a day or less.

While I believe and support sharing and being open about our codebase I think we have to balance that with safeguarding security, privacy, and the public trust.

I understand OC was told to do this so I am not challenging that. What I am going to advocate though is that we draw the line here and at our next release on 7/15, which contains the beginnings of "MyAccount" where people can start submitting their PII that CMS will not be putting that entire codebase out for anyone to use. We can work on doing it in such a way that it makes it difficult for anyone to stand up a shadow/phony site if necessary.

I've copied Frank, Todd, and Michelle to make sure they are aware of this and my position.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Booth, Jon G. (CMS/OC)
Sent: Friday, June 28, 2013 08:25 PM
To: Sivak, Bryan (HHS/IOS); Bataille, Julie (CMS/OC)
Cc: Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Chao, Henry (CMS/OIS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC)
Subject: HealthCare.gov Open Source Release

Bryan & Julie,

I wanted to let you know that the HealthCare.gov open source release is now live (in conjunction with the 1.1 release that we just pushed to production).

The Developers page (<https://www.healthcare.gov/developers>) has been updated with a link to our GitHub repo, which is located at <https://github.com/CMSgov/HealthCare.gov-Open-Source-Release>

Please let me know if you have any questions or feedback .

Thanks,

Jon

From: Sivak, Bryan (HHS/IOS) <[REDACTED]>
Sent: Saturday, June 29, 2013 2:09 AM
To: Chao, Henry (CMS/OIS)
Cc: Booth, Jon G. (CMS/OC); Bataille, Julie (CMS/OC); Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC); Park, Todd; Baitman, Frank (OS/ASA/OCIO); Monteleone, Timothy (OS/ASA); Bowen, Marianne (CMS/OA); Snyder, Michelle (CMS/OA); Armstead, Andrea E. (CMS/OA); Kerr, James T. (CMS/CMHPO); Kendall, Damaris (HHS/OS)
Subject: Re: HealthCare.gov Open Source Release

Henry,

I understand your concerns and am happy to discuss this when I am back from vacation. Damaris can set up some time to talk.

Bryan

On Jun 29, 2013, at 4:11, "Chao, Henry (CMS/OIS)" <[REDACTED]> wrote:

I want to express my reservations about putting nearly all the source code for the hc.gov/Marketplace Portal Website on Github and making it available for absolutely anyone in the entire world to use. While in its current state it does not contain the code for the Online Application, someone with less than honorable intentions can easily stand up a shadow site that would fake out the general public and they can do it easily and literally in just a day or less.

While I believe and support sharing and being open about our codebase I think we have to balance that with safeguarding security, privacy, and the public trust.

I understand OC was told to do this so I am not challenging that. What I am going to advocate though is that we draw the line here and at our next release on 7/15, which contains the beginnings of "MyAccount" where people can start submitting their PII that CMS will not be putting that entire codebase out for anyone to use. We can work on doing it in such a way that it makes it difficult for anyone to stand up a shadow/phony site if necessary.

I've copied Frank, Todd, and Michelle to make sure they are aware of this and my position.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)

[REDACTED] (Alt)

[REDACTED] (BB)

From: Booth, Jon G. (CMS/OC)
Sent: Friday, June 28, 2013 08:25 PM
To: Sivak, Bryan (HHS/IOS); Bataille, Julie (CMS/OC)
Cc: Wallace, Mary H. (CMS/OC); Herron, Julia (OS/IOS); Chao, Henry (CMS/OIS); Trenkle, Tony (CMS/OIS); Patel, Ketan (CMS/OC)
Subject: HealthCare.gov Open Source Release

Bryan & Julie,

I wanted to let you know that the HealthCare.gov open source release is now live (in conjunction with the 1.1 release that we just pushed to production).

The Developers page (<https://www.healthcare.gov/developers>) has been updated with a link to our GitHub repo, which is located at <https://github.com/CMSgov/HealthCare.gov-Open-Source-Release>

Please let me know if you have any questions or feedback.

Thanks,

Jon

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Tuesday, July 09, 2013 11:18 PM
To: Coutts, Todd (CMS/OIS)
Cc: Grothe, Kirk A. (CMS/OIS); Oh, Mark U. (CMS/OIS); Park, Todd; Graubard, Vivian; Berkley, Katrina (CMS/OIS); Outerbridge, Monique (CMS/OIS)
Subject: Sending Todd Park the series of Readiness Walk Through appointments

Todd,

Vivian is Todd Park's scheduler so please send her the appointment for the 7/19 E&E walk through and any other tentative dates for the other reviews. Todd mentioned he might not make it to all but would try to make the 19th and any others that he knows about.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director Office of Information Services Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Park, Todd
Sent: Wednesday, July 10, 2013 12:56 AM
To: michelle.snyder [REDACTED]
Cc: henry.chao [REDACTED] Graubard, Vivian
Subject: Getting together

Hi Michelle, spent five great hours this evening with Henry and the rest of your terrific IT team they are doing truly amazing work!

When are you next in DC? Would love to see if we can get together in the next few days or the beginning of next week so that (a) I can run a summary IT status writeup by you, and which I will subsequently review with Marilyn (very high - level slide or two, for presentation at an up coming WH ACA monthly meeting) and (b) we can go over high -level status of action on key red team recommendations.

I think 30 min would be enough time. We can call Henry in. Thoughts?

Thank you!
Todd

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Tuesday, July 16, 2013 6:24 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Snyder, Michelle (CMS/OA)
Cc: Graubard, Vivian; Kerr, James T. (CMS/CMHPO)
Subject: RE: Two quick things

Todd,

The 19th will include a crude integrated application for discussion and internal review and will not have the compare piece up and running (recall the data will not be together and validated for testing until at least 8/15 and that's with a partial set).

My recommendation is that the readiness review in which we conduct is not really conducive for being an observer at this point and we should stick to the briefing format for you at various intervals.

Thanks.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, July 16, 2013 5:44 PM
To: Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian
Subject: Two quick things

Hi Marilyn, Aryana, Michelle, and Henry! Two quick items:

1. I will be working on and sending you draft slides [REDACTED] tonight they will basically be a Powerpoint-ized version of the Word document we reviewed. If you could get me any comments by noon tomorrow, that would be terrific would like at that point to send the slides to Mark/Jeanne for their review
2. I am very much looking forward to being a fly on the wall at the E&E readiness review on the 19th I'll be able to attend from 11 am to 4 pm. (a) Is this still happening on the 19th? (b) Will this include a walkthrough of the FFM web workflow, including Plan Compare? The reason I ask is that David Simas is very interested in being a fly on the wall for a walkthrough of the FFM web workflow, and also would love to soak up a sense of the underlying complexity of the overall Mktplace machine. If the 19th will include a walkthrough of the FFM web workflow, then wanted to ask if David could come with me (for some or all of the time) he would really appreciate the opportunity, and/but also doesn't want to disrupt things in any way..... (FYI, I've briefed him in detail about the fact that we've locked down business requirements and are in pure operational execution mode for Oct 1/Jan 1). Thoughts?

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Tuesday, July 16, 2013 5:53 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian
Subject: Re: Two quick things

We are in a hearing tomorrow and will not be able to comment until the afternoon at the earliest

We need to talk abt attendance at readiness reviews. I am sure you can anticipate my position on that
Flys on the wall are seldom invisible and often distract ing!!!!

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, July 16, 2013 05:44 PM
To: Tavenner, Marilyn (CMS/OA); Khalid, Aryana C. (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian <[REDACTED]>
Subject: Two quick things

Hi Marilyn, Aryana, Michelle, and Henry! Two quick items:

1. I will be working on and sending you draft slides [REDACTED] tonight they will basically be a Powerpoint-ized version of the Word document we reviewed. If you could get me any comments by noon tomorrow, that would be terrific would like at that point to send the slides to Mark/Jeanne for their review
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Thank you!
Todd

From: Coutts, Todd (CMS/OIS) <[REDACTED]>
Sent: Wednesday, July 10, 2013 6:10 PM
To: Graubard, Vivian; Chao, Henry (CMS/OIS)
Cc: Grothe, Kirk A. (CMS/OIS); Oh, Mark U. (CMS/OIS); Park, Todd; Berkley, Katrina (CMS/OIS); Outerbridge, Monique (CMS/OIS)
Subject: RE: Sending Todd Park the series of Readiness Walk Through appointments

Hi Vivian,

Here are the dates:

1. Friday, July 19 (9 to 4): Readiness Review Part 1
2. Wed, July 24 (9 to 4): Readiness Review Part 2
3. Friday, August 2 (8:30 to 3): Readiness Review Part 3

Todd Coutts
Centers for Medicare & Medicaid Services
Office of Info. Services | Consumer Info. & Insurance Systems Group
[REDACTED] (office) | [REDACTED] (mobile) | [REDACTED]
7700 Wisconsin Ave Bethesda MD 20814 | Location: 9308

-----Original Message-----

From: Graubard, Vivian [mailto:[REDACTED]]
Sent: Wednesday, July 10, 2013 11:28 AM
To: Coutts, Todd (CMS/OIS); Chao, Henry (CMS/OIS)
Cc: Grothe, Kirk A. (CMS/OIS); Oh, Mark U. (CMS/OIS); Park, Todd; Berkley, Katrina (CMS/OIS); Outerbridge, Monique (CMS/OIS)
Subject: RE: Sending Todd Park the series of Readiness Walk Through appointments

Thank you, Henry.

Todd, before sending the appointments, if you wouldn't mind sending me a list of dates I need to block off (or reschedule around) – that would be great.

Thanks,
Vivian

-----Original Message-----

From: Coutts, Todd (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, July 10, 2013 8:24 AM
To: Chao, Henry (CMS/OIS)
Cc: Grothe, Kirk A. (CMS/OIS); Oh, Mark U. (CMS/OIS); Park, Todd; Graubard, Vivian; Berkley, Katrina (CMS/OIS); Outerbridge, Monique (CMS/OIS)
Subject: RE: Sending Todd Park the series of Readiness Walk Through appointments

Yes, I will do that.

Todd Coutts

I am in DC this Friday and next Monday. I understand Henry is helping with the write-up. Also got a question from Marilyn last night about have we "shut down the red team exercise". I think the red team is pretty much passé at this juncture given our readiness review activity but we can talk about that as well if you wish.

Michelle

Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, July 10, 2013 12:56 AM
To: Snyder, Michelle (CMS/OA)
Cc: Chao, Henry (CMS/OIS); Graubard, Vivian
Subject: Getting together

Hi Michelle, spent five great hours this evening with Henry and the rest of your terrific IT team they are doing truly amazing work!

When are you next in DC? Would love to see if we can get together in the next few days or the beginning of next week so that (a) I can run a summary IT status writeup by you, and which I will subsequently review with Marilyn (very high-level slide or two, for presentation at an upcoming WH ACA monthly meeting) and (b) we can go over high-level status of action on key red team recommendations.

I think 30 min would be enough time. We can call Henry in. Thoughts?

Thank you!
Todd

From: Park, Todd
Sent: Wednesday, July 17, 2013 12:33 AM
To: 'Michelle.Snyder [REDACTED]'; 'Marilyn.Tavener [REDACTED]'; 'Aryana.Khalid [REDACTED]'; 'henry.chao [REDACTED]'
Cc: Graubard, Vivian
Subject: RE: Two quick things
Attachments: IT slide v1.pptx

Hi team, draft slide enclosed (hews closely to the Word document) any edits by 4 pm tomorrow (Wednesday) would be hugely appreciated, thanks!

From: Park, Todd
Sent: Tuesday, July 16, 2013 7:10 PM
To: 'Michelle.Snyder [REDACTED]'; 'Marilyn.Tavener [REDACTED]'; 'Aryana.Khalid [REDACTED]'; 'henry.chao [REDACTED]'
Cc: Graubard, Vivian
Subject: Re: Two quick things

OK, no problem -- it looks like I only need to put together one slide, and it will adhere tightly to and simply summarize the points in the Word doc. Will send the slide to you tonight -- if you could send me any edits by 4 pm tomorrow, that would be great; draft slides are being circulated to Deputies for comment at 5 pm. (It will take you 5 min to read the slide)

And I/ David won't come to the readiness reviews -- don't want to distract or disrupt, which upon reflection I suspect would happen even if we didn't say a single thing.

(Will follow up later about a possible focused briefing session for David and me in Baltimore that happens at the appropriate moment)

May the Force be with you in the hearing tomorrow,

Todd

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Tuesday, July 16, 2013 05:53 PM
To: Park, Todd; Tavener, Marilyn (CMS/OA) <[REDACTED]>; Khalid, Aryana C. (CMS/OA) <[REDACTED]>; Chao, Henry (CMS/OIS) <[REDACTED]>
Cc: Graubard, Vivian
Subject: Re: Two quick things

We are in a hearing tomorrow and will not be able to comment until the afternoon at the earliest

We need to talk about attendance at readiness reviews. I am sure you can anticipate my position on that. Flies on the wall are seldom invisible and often distracting!!!!

Michelle

Sent: Thursday, July 25, 2013 09:53 AM

To: Park, Todd

Cc: Oh, Mark U. (CMS/OIS) <[redacted]>; Coutts, Todd (CMS/OIS) <[redacted]>; Outerbridge, Monique (CMS/OIS) <[redacted]>; Grothe, Kirk A. (CMS/OIS) <[redacted]>; Berkley, Katrina (CMS/OIS) <[redacted]>; Rhones, Rhonda D. (CMS/OIS) <[redacted]>; Graubard, Vivian; rich.martin <rich.martin@[redacted]>; cheryl.campbell <cheryl.campbell@[redacted]>; Lakshmi.Manambedu <Lakshmi.Manambedu@[redacted]>; Mark.Calem <Mark.Calem@[redacted]>; Paul.Weiss <Paul.Weiss@[redacted]>; Wallace, Mary H. (CMS/OC) <[redacted]>; Booth, Jon G. (CMS/OC) <[redacted]>

Subject: Walk through of the online application in hc.gov

Todd,

If you recall we had agreed to provide you a walk through and demo of the online application in its current form so you can get a chance to peek under the covers of hc.gov.

Michelle mentioned you contacted her about this and that I should follow-up with you to schedule the walk through.

Katrina can work with Vivian to find a window of opportunity next week if you agree.

Let us know.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director Office of Information Services Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[redacted] (Pri)
[redacted] (Alt)
[redacted] (BB)

From: Mielke, Dawn M.
Sent: Wednesday, July 31, 2013 9:22 AM
To: Snyder, Michelle (CMS/OA); Park, Todd
Cc: Graubard, Vivian
Subject: RE: Walk through of the online application in hc.gov

Sounds good, please call Todd at [REDACTED]

Best regards,
Dawn Mielke

[REDACTED]
Office of Science and Technology Policy
Office: [REDACTED]
Cell: [REDACTED]

-----Original Message-----

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 9:16 AM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian; Mielke, Dawn M.
Subject: RE: Walk through of the online application in hc.gov

How about 9:45..have a number you want me to call on?

michelle

A.Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

-----Original Message-----

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 8:32 AM
To: Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian; Mielke, Dawn M.
Subject: Re: Walk through of the online application in hc.gov

Hi Michelle, great -- Henry, please let me know if Aug 5 works for the mtg below; if so, I'll coordinate with Julian and David Simas to try to make sure that we can do 1 visit with all of us, for the sake of time efficiency for you and team.

And Michelle, would love to chat! I can talk anytime between 9:30 and 10:30, at 4:45, or at or any time after 6 pm -- do any of those times work for you?

Cheers,
Todd

----- Original Message -----

From: Park, Todd [mailto: [REDACTED]]
Sent: Tuesday, July 30, 2013 09:43 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA)
Subject: RE: Walk through of the online application in hc.gov

Hi Henry and Michelle, just circling back on the below, to see what general date range you think might make sense for this visit -- would next week work? Just need to have a bit of advance time to line up Julian and David's schedules (and I'm out the week of August 12-16). Also: if you want to cut down on the time of the visit, ratcheting it down to something more like 60-90 minutes, or modify the agenda in any way, just let me know....

Thoughts? Thanks!
Todd

-----Original Message-----

From: Park, Todd
Sent: Thursday, July 25, 2013 3:01 PM
To: 'henry.chao [REDACTED]'
Cc: 'Michelle.Snyder [REDACTED]'
Subject: Re: Walk through of the online application in hc.gov

Hi Henry, thanks so much! To provide more context, as I shared with Michelle, I'll be bringing David Simas and Julian Harris (Keith Fontenot's successor, newly arrived) with me. Would love to (1) walk through the current live online workflow (ideally from the start of the application through Plan Compare and selection) and (2) provide the opportunity for Julian to get the latest update on (a) IT dev, (b) testing, and (c) operational prep.

For (2), Julian is interested in one level of detail below the [REDACTED] presentation. I would not prepare any custom materials whatsoever for the meeting, but it would be great to show him (a) the slide you showed me with all of the IT modules/completion dates, (b) the testing summary for fed agencies, states, issuers you wrote up recently (I think for someone's testimony), or similar material, and (c) a slide (if you have it) of key operationalization steps (high level) on the road to Oct 1 and Dec 1 (e.g., contract X let, center X live, etc.).

Both Julian and David took great pains to ask that the visit not be disruptive to your work -- I think that the message to give y'all the space to rock and roll is spreading :)

So I'm thinking a focused two-hour visit, in Baltimore, going thru the live workflow, and using high-level materials you already have.

Would next week be best, or would the week after be better, or would either week be fine? I haven't yet pinged David and Julian for their availability, but wanted to see what was optimal for you first. It would be good to combine both of their visits, to save you time. Thoughts on timing?

Michelle, it would be terrific for you to join -- would be great for you to meet Julian and David, both of whom are terrific; and I've told both of them that you and Henry are pure awesomeness :)

Thanks!
Todd

----- Original Message -----

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Wednesday, July 31, 2013 9:16 AM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian; Mielke, Dawn M.
Subject: RE: Walk through of the online application in hc.gov

How about 9:45..have a number you want me to call on?

michelle

A.Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

-----Original Message-----

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 8:32 AM
To: Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Graubard, Vivian; Mielke, Dawn M.
Subject: Re: Walk through of the online application in hc.gov

Hi Michelle, great -- Henry, please let me know if Aug 5 works for the mtg below; if so, I'll coordinate with Julian and David Simas to make sure that we can do 1 visit with all of us, for the sake of time efficiency for you and team.

And Michelle, would love to chat! I can talk anytime between 9:30 and 10:30, at 4:45, or at or any time after 6 pm -- do any of those times work for you?

Cheers,
Todd

----- Original Message -----

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 07:48 AM
To: Park, Todd; Chao, Henry (CMS/OIS) <[REDACTED]>
Subject: Re: Walk through of the online application in hc.gov

I think Julian was looking to be here on the 5th. Haven't spoken with Henry as to whether or not that works

Also - Todd - is there a good time to call you today - I have a proposition for you that doesn't involve marketplaces for a change!!!!

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd
Sent: Wednesday, July 31, 2013 9:43 PM
To: 'henry.chao [REDACTED]'; 'Michelle.Snyder [REDACTED]'
Cc: Graubard, Vivian; Mielke, Dawn M.; 'monique.outerbridge [REDACTED]'; 'Todd.Couts1 [REDACTED]'
Subject: Re: Walk through of the online application in hc.gov

Henry, absolutely no problem, and again, please don't hesitate to say that another day would work better -- we want to prioritize your operational imperatives above all other things!

----- Original Message -----

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 08:13 PM
To: Park, Todd; Snyder, Michelle (CMS/OA) <[REDACTED]>
Cc: Graubard, Vivian; Mielke, Dawn M.; Outerbridge, Monique (CMS/OIS) <[REDACTED]>; Coutts, Todd (CMS/OIS) <[REDACTED]>
Subject: Re: Walk through of the online application in hc.gov

I have asked the folks involved on the CMS and CGI sides if the 5th will work but it might take until tomorrow to confirm since it is the same people trying to get Lite Account launched.

Will respond as early as possible tomorrow morning.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

On 7/31/13 8:31 AM, "Park, Todd" <[REDACTED]> wrote:

>Hi Michelle, great -- Henry, please let me know if Aug 5 works for the
>mtg below; if so, I'll coordinate with Julian and David Simas to try to
>make sure that we can do 1 visit with all of us, for the sake of time
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>10:30, at 4:45, or at or any time after 6 pm -- do any of those times
>work for you?

>

>Cheers,

>Todd

>

>

>----- Original Message -----

>From: Snyder, Michelle (CMS/OA) [mailto: [REDACTED]]

>Sent: Wednesday, July 31, 2013 07:48 AM

>To: Park, Todd; Chao, Henry (CMS/OIS) < [REDACTED] >

>Subject: Re: Walk through of the online application in hc.gov

>

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>Henry as to whether or not that works

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>propositiifn for you that doesn't involve marketplaces for a change!!!!

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>Sent from my BlackBerry Wireless Device

>

>

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>From: Park, Todd [mailto: [REDACTED]]

>Sent: Tuesday, July 30, 2013 09:43 PM

>To: Chao, Henry (CMS/OIS)

>Cc: Snyder, Michelle (CMS/OA)

>Subject: RE: Walk through of the online application in hc.gov

>

>Hi Henry and Michelle, just circling back on the below, to see what

>general date range you think might make sense for this visit -- would

>next week work? Just need to have a bit of advance time to line up

>Julian and David's schedules (and I'm out the week of August 12 -16).

>Also: if you want to cut down on the time of the visit, ratcheting it

>down to something more like 60-90 minutes, or modify the agenda in any

>way, just let me know....

>

>Thoughts? Thanks!

>Todd

>

>---Original Message---

>From: Park, Todd

>Sent: Thursday, July 25, 2013 3:01 PM

>To: 'henry.chao [REDACTED]

>Cc: 'Michelle.Snyder [REDACTED]

>Subject: Re: Walk through of the online application in hc.gov

>

>Hi Henry, thanks so much! To provide more context, as I shared with

>Michelle, I'll be bringing David Simas and Julian Harris (Keith

>Fontenot's successor, newly arrived) with me. Would love to (1) walk

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>application through Plan Compare and selection) and (2) provide the

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>the meeting, but it would be great to show him (a) the slide you showed
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>someone's testimony), or similar material, and (c) a slide (if you have
>it) of key operationalization steps (high level) on the road to Oct 1
>and Dec 1 (e.g., contract X let, center X live, etc.).

>
>Both Julian and David took great pains to ask that the visit not be
>disruptive to your work -- I think that the message to give y'all the
>space to rock and roll is spreading :)

>
>So I'm thinking a focused two-hour visit, in Baltimore, going thru the
>live workflow, and using high-level materials you already have.

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>availability, but wanted to see what was optimal for you first. It
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>Thoughts on timing?

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>you to meet Julian and David, both of whom are terrific; and I've told
>both of them that you and Henry are pure awesomeness :)

>
>Thanks!
>Todd

>
>
>
>----- Original Message -----

>From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
>Sent: Thursday, July 25, 2013 09:53 AM
>To: Park, Todd
>Cc: Oh, Mark U. (CMS/OIS) <[REDACTED]>; Coutts, Todd (CMS/OIS)
><[REDACTED]>; Outerbridge, Monique (CMS/OIS)
><[REDACTED]>; Grothe, Kirk A. (CMS/OIS)
><[REDACTED]>; Berkley, Katrina (CMS/OIS)
><[REDACTED]>; Rhones, Rhonda D. (CMS/OIS)
><[REDACTED]>; Graubard, Vivian;
>'rich.martin <rich.martin@[REDACTED]>;
>'cheryl.campbell <cheryl.campbell@[REDACTED]>;
>'Lakshmi.Manambedu <Lakshmi.Manambedu@[REDACTED]>;
>'Mark.Calem <Mark.Calem@[REDACTED]>;
>'Paul.Weiss <Paul.Weiss@[REDACTED]>; Wallace, Mary H.
>(CMS/OC) <[REDACTED]>; Booth, Jon G. (CMS/OC)
><[REDACTED]>
>Subject: Walk through of the online application in hc.gov

>
>Todd,
>

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>the online application in its current form so you can get a chance to
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>follow-up with you to schedule the walk through.

>
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>if you agree.

>
>Let us know.

>
>Thanks.

>
>Henry Chao
>Deputy Chief Information Officer and Deputy Director Office of
>Information Services Centers for Medicare & Medicaid Services
>7500 Security Blvd
>Baltimore, MD 21244

> [REDACTED] (Pri)
> [REDACTED] (Alt)
> [REDACTED] (BB)

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Thursday, August 01, 2013 1:20 PM
To: Park, Todd; Snyder, Michelle (CMS/OA)
Cc: Graubard, Vivian; Mielke, Dawn M.; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: Re: Walk through of the online application in hc.gov

Todd,

We have Lite Account Roll out through Monday and Issuer/trades coming in on Tuesday so earliest would be Wednesday or Thursday.

Henry Chao
Deputy Chief Information Officer and Deputy Director Office of Information Services Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244
[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

----- Original Message -----

From: Park, Todd [mailto:[REDACTED]]
Sent: Thursday, August 01, 2013 01:10 PM
To: Chao, Henry (CMS/OIS); Snyder, Michelle (CMS/OA)
Cc: Graubard, Vivian <[REDACTED]>; Mielke, Dawn M. <[REDACTED]>; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS)
Subject: RE: Walk through of the online application in hc.gov

Hi Henry/Michelle, just some additional scheduling intel to consider -- David Simas could be at CMS on Monday between 10 and 12:30. Julian will be there all morning, and says that he has meetings from 10 to 12. If Monday is a good day to do the visit -- and again, everyone is TOTALLY good with doing it another day, if that is better for you -- perhaps we try to do something in the 10 to 12 window on Marke tplace workflow walkthrough and general tech/ops updates, and Julian's other CMS meetings get moved earlier?

And again, totally good with picking another day entirely -- just let us know, thanks!

-----Original Message-----

From: Park, Todd
Sent: Wednesday, July 31, 2013 9:43 PM
To: 'henry.chao [REDACTED]'; 'Michelle.Snyder [REDACTED]'
Cc: Graubard, Vivian; Mielke, Dawn M.; 'monique.outerbridge [REDACTED]'; 'Todd.Coutts [REDACTED]'
Subject: Re: Walk through of the online application in hc.gov

Henry, absolutely no problem, and again, please don't hesitate to say that another day would work better -- we want to prioritize your operational imperatives above all other things!

----- Original Message -----

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Wednesday, July 31, 2013 08:13 PM
To: Park, Todd; Snyder, Michelle (CMS/OA) < [REDACTED] >
Cc: Graubard, Vivian; Mielke, Dawn M.; Outerbridge, Monique (CMS/OIS) < [REDACTED] >; Coutts, Todd (CMS/OIS) < [REDACTED] >
Subject: Re: Walk through of the online application in hc.gov

I have asked the folks involved on the CMS and CGI sides if the 5th will work but it might take until tomorrow to confirm since it is the same people trying to get Lite Account launched.

Will respond as early as possible tomorrow morning.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

On 7/31/13 8:31 AM, "Park, Todd" < [REDACTED] > wrote:

>Hi Michelle, great -- Henry, please let me know if Aug 5 works for the
>mtg below; if so, I'll coordinate with Julian and David Simas to try to
>make sure that we can do 1 visit with all of us, for the sake of time
>efficiency for you and team.

>
>And Michelle, would love to chat! I can talk anytime between 9:30 and
>10:30, at 4:45, or at or any time after 6 pm -- do any of those times
>work for you?

>
>Cheers,
>Todd

>
>

>----- Original Message -----

>From: Snyder, Michelle (CMS/OA) [mailto: [REDACTED]]
>Sent: Wednesday, July 31, 2013 07:48 AM
>To: Park, Todd; Chao, Henry (CMS/OIS) < [REDACTED] >
>Subject: Re: Walk through of the online application in hc.gov

>
>I think Julian was looking to be here on the 5th. Haven't spoken with
>Henry as to whether or not that works

>
>Also - Todd - is there a good time to call you today - I have a
>propositiion for you that doesn't involve marketplaces for a change!!!!
>

>Michelle

>-----

>Sent from my BlackBerry Wireless Device

>

>

>----- Original Message -----

>From: Park, Todd [mailto:████████████████████]

>Sent: Tuesday, July 30, 2013 09:43 PM

>To: Chao, Henry (CMS/OIS)

>Cc: Snyder, Michelle (CMS/OA)

>Subject: RE: Walk through of the online application in hc.gov

>

>Hi Henry and Michelle, just circling back on the below, to see what
>general date range you think might make sense for this visit -- would
>next week work? Just need to have a bit of advance time to line up
>Julian and David's schedules (and I'm out the week of August 12 -16).
>Also: if you want to cut down on the time of the visit, ratcheting it
>down to something more like 60-90 minutes, or modify the agenda in any
>way, just let me know....

>

>Thoughts? Thanks!

>Todd

>

>-----Original Message-----

>From: Park, Todd

>Sent: Thursday, July 25, 2013 3:01 PM

>To: 'henry.chao' [mailto:████████████████████]

>Cc: 'Michelle.Snyder' [mailto:████████████████████]

>Subject: Re: Walk through of the online application in hc.gov

>

>Hi Henry, thanks so much! To provide more context, as I shared with
>Michelle, I'll be bringing David Simas and Julian Harris (Keith
>Fontenot's successor, newly arrived) with me. Would love to (1) walk
>through the current live online workflow (ideally from the start of the
>application through Plan Compare and selection) and (2) provide the
>opportunity for Julian to get the latest update on (a) IT dev, (b)
>testing, and (c) operational prep.

>

>For (2), Julian is interested in one level of detail below the ██████████
>presentation. I would not prepare any custom materials whatsoever for
>the meeting, but it would be great to show him (a) the slide you showed
>me with all of the IT modules/completion dates, (b) the testing summary
>for fed agencies, states, issuers you wrote up recently (I think for
>someone's testimony), or similar material, and (c) a slide (if you have
>it) of key operationalization steps (high level) on the road to Oct 1
>and Dec 1 (e.g., contract X let, center X live, etc.).

>

>Both Julian and David took great pains to ask that the visit not be
>disruptive to your work -- I think that the message to give y'all the
>space to rock and roll is spreading :)

>

>So I'm thinking a focused two-hour visit, in Baltimore, going thru the

>live workflow, and using high-level materials you already have.
>
>Would next week be best, or would the week after be better, or would
>either week be fine? I haven't yet pinged David and Julian for their
>availability, but wanted to see what was optimal for you first. It
>would be good to combine both of their visits, to save you time.
>Thoughts on timing?
>
>Michelle, it would be terrific for you to join -- would be great for
>you to meet Julian and David, both of whom are terrific; and I've told
>both of them that you and Henry are pure awesomeness :)

>Thanks!

>Todd

>----- Original Message -----

>From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
>Sent: Thursday, July 25, 2013 09:53 AM
>To: Park, Todd
>Cc: Oh, Mark U. (CMS/OIS) < [REDACTED] >; Coutts, Todd (CMS/OIS)
>< [REDACTED] >; Outerbridge, Monique (CMS/OIS)
>< [REDACTED] >; Grothe, Kirk A. (CMS/OIS)
>< [REDACTED] >; Berkley, Katrina (CMS/OIS)
>< [REDACTED] >; Rhones, Rhonda D. (CMS/OIS)
>< [REDACTED] >; Graubard, Vivian;
>'rich.martin [REDACTED] <rich.martin [REDACTED] >;
>'cheryl.campbell [REDACTED] <cheryl.campbell [REDACTED] >;
>'Lakshmi.Manambedu [REDACTED] <Lakshmi.Manambedu [REDACTED] >;
>'Mark.Calem [REDACTED] <Mark.Calem [REDACTED] >;
>'Paul.Weiss [REDACTED] <Paul.Weiss [REDACTED] >; Wallace, Mary H.
>(CMS/OC) < [REDACTED] >; Booth, Jon G. (CMS/OC)
>< [REDACTED] >
>Subject: Walk through of the online application in hc.gov

>Todd,

>
>If you recall we had agreed to provide you a walk through and demo of
>the online application in its current form so you can get a chance to
>peek under the covers of hc.gov.

>Michelle mentioned you contacted her about this and that I should
>follow-up with you to schedule the walk through.

>Katrina can work with Vivian to find a window of opportunity next week
>if you agree.

>Let us know.

>Thanks.

>Henry Chao

From: Park, Todd
Sent: Thursday, August 01, 2013 1:20 PM
To: 'henry.chao [REDACTED]'; 'Michelle.Snyder [REDACTED]'
Cc: Graubard, Vivian; Mielke, Dawn M.; 'monique.outerbridge [REDACTED]'; 'Todd.Couts1 [REDACTED]'
Subject: RE: Walk through of the online application in hc.gov

Apologies, additional schedule intel. It turns out that David Simas can be out of the office from 10 to 12:30, INCLUDING travel time. So: what could work, perhaps, is an 11 to 12:30 meeting in Baltimore, where the first 45 minutes is a walkthrough of the live user workflow (with David, Julian, and me) and the second 45 minutes is the general tech/ops update (with just Julian and me). And again, if this doesn't work for you, totally cool, we'll schedule it for some other day. Just let us know, thanks!

-----Original Message-----

From: Park, Todd
Sent: Thursday, August 01, 2013 1:11 PM
To: 'henry.chao [REDACTED]'; 'Michelle.Snyder [REDACTED]'
Cc: Graubard, Vivian; Mielke, Dawn M.; 'monique.outerbridge [REDACTED]'; 'Todd.Couts [REDACTED]'
Subject: RE: Walk through of the online application in hc.gov

Hi Henry/Michelle, just some additional scheduling intel to consider -- David Simas could be at CMS on Monday between 10 and 12:30. Julian will be there all morning, and says that he has meetings from 10 to 12. If Monday is a good day to do the visit -- and again, everyone is TOTALLY good with doing it another day, if that is better for you -- perhaps we try to do something in the 10 to 12 window on Marketplace workflow walkthrough and general tech/ops updates, and Julian's other CMS meetings get moved earlier?

And again, totally good with picking another day entirely -- just let us know, thanks!

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From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, July 31, 2013 08:13 P M
To: Park, Todd; Snyder, Michelle (CMS/OA) <[REDACTED]>
Cc: Graubard, Vivian; Mielke, Dawn M.; Outerbridge, Monique (CMS/OIS) <[REDACTED]>; Couts, Todd (CMS/OIS) <[REDACTED]>
Subject: Re: Walk through of the online application in hc.gov

From: Park, Todd
Sent: Thursday, August 01, 2013 3:03 PM
To: Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; michelle.snyder [REDACTED];
henry.chao [REDACTED]; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS);
Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

Sorry, resending with corrected email subject line ☺

From: Park, Todd
Sent: Thursday, August 01, 2013 3:03 PM
To: Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; michelle.snyder [REDACTED]; henry.chao [REDACTED]; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: CMS visit update -- Wed or Thurs next week possible?

Hi Julian and David, with respect to the CMS Marketplace live workflow walkthrough/tech ops update meeting: it looks like the earliest the CMS tech team can do the meeting is Wed (8/7), Thurs (8/8), or Friday (8/9) next week. (Mon/Tues will be consumed by Lite Account rollout and issuer meetings).

I could conceivably do a CMS visit the morning of Wed, 8/7, anytime between 8 and 11:30 (I'd have to leave Baltimore by 11:30), or the morning of Friday, 8/9, anytime between 8 and 12 pm.

Julian/David, would either/both of those slots work for you?

I think we're looking for a 90 minute block of time to be in Baltimore (the workflow walkthrough/discussion would be 45 minutes of that time).

Looping Team CMS and Dawn/Viv....

Dawn/Viv will help coordinate.... Hopefully we can find a time next week that works for all.... Thanks!

Todd

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Todd

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Thursday, August 01, 2013 4:28 PM
To: Park, Todd; Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; Snyder, Michelle (CMS/OA); Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Best time for my staff and CGI is Friday 8/9.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Todd Park <[REDACTED]>
Date: Thu, 1 Aug 2013 19:03:24 +0000
To: "Harris, Julian" <[REDACTED]>, "Simas, David M." <[REDACTED]>
Cc: "Mielke, Dawn M." <[REDACTED]>, "Graubard, Vivian" <[REDACTED]>, Michelle Snyder <[REDACTED]>, HENRY CHAO <[REDACTED]>, Monique Outerbridge <[REDACTED]>, Todd Coutts <[REDACTED]>, Mary Wallace <[REDACTED]>, Jon Booth <[REDACTED]>
Subject: RE: CMS visit update -- Wed or Fri next week possible?

Sorry, resending with corrected email subject line ☺

From: Park, Todd
Sent: Thursday, August 01, 2013 3:03 PM
To: Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; [michelle.snyder@\[REDACTED\]](mailto:michelle.snyder@[REDACTED]); [henry.chao@\[REDACTED\]](mailto:henry.chao@[REDACTED]); Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
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Date: Thu, 1 Aug 2013 19:03:24 +0000
To: "Harris, Julian" <[REDACTED]>, "Simas, David M." <[REDACTED]>
Cc: "Mielke, Dawn M." <[REDACTED]>, "Graubard, Vivian" <[REDACTED]>, Michelle Snyder <[REDACTED]>, HENRY CHAO <[REDACTED]>, Monique Outerbridge <[REDACTED]>, Todd Coutts <[REDACTED]>, Mary Wallace <[REDACTED]>, Jon Booth <[REDACTED]>
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Sent: Thursday, August 01, 2013 3:03 PM
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Cc: Mielke, Dawn M.; Graubard, Vivian; michelle.snyder <[REDACTED]>; henry.chao <[REDACTED]>; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
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Todd

To: 'Todd Y Park [redacted] <Todd Y Park [redacted]>
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Can you give me a call real quick?
[redacted]

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[redacted] (Pri)
[redacted] (Alt)
[redacted] (BB)

From: Park, Todd [mailto:[redacted]]
Sent: Thursday, August 01, 2013 06:56 PM
To: Harris, Julian <[redacted]>; Chao, Henry (CMS/OIS); Simas, David M. <[redacted]>
Cc: Mielke, Dawn M. <[redacted]>; Graubard, Vivian <[redacted]>; Snyder, Michelle (CMS/OA); Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

How about Thursday, 8/8, starting at 5 pm (or later)? (Henry, we should be back from Culpeper by then, yes?)

From: Harris, Julian
Sent: Thursday, August 01, 2013 4:49 PM
To: 'henry.chao [redacted]'; Park, Todd; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; 'Michelle.Snyder [redacted]'; 'monique.outerbridge [redacted]'; 'Todd.Coutts [redacted]'; 'Mary.Wallace [redacted]'; 'Jon.Booth [redacted]';
Subject: Re: CMS visit update -- Wed or Fri next week possible?

I'm unavailable on Friday.

From: Chao, Henry (CMS/OIS) [mailto:[redacted]]
Sent: Thursday, August 01, 2013 04:27 PM
To: Park, Todd; Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; Snyder, Michelle (CMS/OA) <[redacted]>; Outerbridge, Monique (CMS/OIS) <[redacted]>; Coutts, Todd (CMS/OIS) <[redacted]>; Wallace, Mary H. (CMS/OC) <[redacted]>; Booth, Jon G. (CMS/OC) <[redacted]>
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Best time for my staff and CGI is Friday 8/9.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[redacted]

demonstrating the Online Streamlined Application (in "beta") for her and a select group the week of 8/26.

We can include in our trip to visit with Verizon-Terremark in Culpeper next Thursday 8/8 a visit to CGI in Herndon and give you a demo, but it would only be you.

Your choices are then get a demo by yourself next Thursday or come as part of Marilyn's walk through the week of 8/26.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Chao, Henry (CMS/OIS)
Sent: Friday, August 02, 2013 10:13 AM
To: 'Todd Y Park' <Todd Y Park >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Can you give me a call real quick?

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Park, Todd [mailto: >
Sent: Thursday, August 01, 2013 06:56 PM
To: Harris, Julian < >; Chao, Henry (CMS/OIS); Simas, David M.
< >
Cc: Mielke, Dawn M. < >; Graubard, Vivian < >; Snyder, Michelle (CMS/OA); Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

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Sent: Thursday, August 01, 2013 4:49 PM
To: 'henry.chao >; Park, Todd; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; 'Michelle.Snyder > 'monique.outerbridge >

From: Park, Todd
Sent: Tuesday, August 06, 2013 3:43 PM
To: Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Coutts, Todd (CMS/OIS); Outerbridge, Monique (CMS/OIS); Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC); Reilly, Megan C. (CMS/OC); Mielke, Dawn M.; Graubard, Vivian
Subject: RE: CMS visit update -- Wed or Fri next week possible?

OK, great, thank you! Michelle, should I call you at your office?

From: Snyder, Michelle (CMS/OA) [mailto: [REDACTED]]
Sent: Tuesday, August 06, 2013 3:06 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Coutts, Todd (CMS/OIS); Outerbridge, Monique (CMS/OIS); Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC); Reilly, Megan C. (CMS/OC); Mielke, Dawn M.; Graubard, Vivian
Subject: Re: CMS visit update -- Wed or Fri next week possible?

430

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto: [REDACTED]]
Sent: Tuesday, August 06, 2013 12:40 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Coutts, Todd (CMS/OIS); Outerbridge, Monique (CMS/OIS); Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC); Reilly, Megan C. (CMS/OC); Mielke, Dawn M. < [REDACTED] >; Graubard, Vivian < [REDACTED] >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Henry, sounds good -- can we jump on the phone for 5 min t oday just to finalize what we should do on this front and with David/Julian? Michelle, would be great if you could join as well.... Would a time between 3:30 and 5 work, or at or anytime after 6 today? Will just be 5 minutes.... Thanks!

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Friday, August 02, 2013 10:41 AM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) < [REDACTED] >; Coutts, Todd (CMS/OIS) < [REDACTED] >; Outerbridge, Monique (CMS/OIS) < [REDACTED] >; Kerr, James T. (CMS/CMHPO) < [REDACTED] >; Wallace, Mary H. (CMS/OC) < [REDACTED] >; Booth, Jon G. (CMS/OC) < [REDACTED] >; Reilly, Megan C. (CMS/OC) < [REDACTED] >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Todd,

I just spoke to Michelle and this is the direction we will go based on her "guidance."

Marilyn wants a walk through of what has been built, basically the same thing you are asking for except we are

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Tuesday, August 06, 2013 3:06 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Coutts, Todd (CMS/OIS); Outerbridge, Monique (CMS/OIS); Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC); Reilly, Megan C. (CMS/OC); Mielke, Dawn M.; Graubard, Vivian
Subject: Re: CMS visit update -- Wed or Fri next week possible?

430

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, August 06, 2013 12:40 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Coutts, Todd (CMS/OIS); Outerbridge, Monique (CMS/OIS); Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC); Reilly, Megan C. (CMS/OC); Mielke, Dawn M. <[REDACTED]>; Graubard, Vivian <[REDACTED]>
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Sent: Friday, August 02, 2013 10:41 AM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) <[REDACTED]>; Coutts, Todd (CMS/OIS) <[REDACTED]>; Outerbridge, Monique (CMS/OIS) <[REDACTED]>; Kerr, James T. (CMS/CMHPO) <[REDACTED]>; Wallace, Mary H. (CMS/OC) <[REDACTED]>; Booth, Jon G. (CMS/OC) <[REDACTED]>; Reilly, Megan C. (CMS/OC) <[REDACTED]>
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Todd,

I just spoke to Michelle and this is the direction we will go based on her "guidance."

Marilyn wants a walk through of what has been built, basically the same thing you are asking for except we are demonstrating the Online Streamlined Application (in "beta") for her and a select group the week of 8/26.

We can include in our trip to visit with Verizon -Terremark in Culpeper next Thursday 8/8 a visit to CGI in Herndon and give you a demo, but it would only be you.

Your choices are then get a demo by yourself next Thursday or come as part of Marilyn's walk through the week of 8/26.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Chao, Henry (CMS/OIS)
Sent: Friday, August 02, 2013 10:13 AM
To: 'Todd Y Park <Todd Y Park >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Can you give me a call real quick?

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

(Pri)
(Alt)
(BB)

From: Park, Todd [mailto: < >]
Sent: Thursday, August 01, 2013 06:56 PM
To: Harris, Julian < >; Chao, Henry (CMS/OIS); Simas, David M. < >
Cc: Mielke, Dawn M. < >; Graubard, Vivian < >; Snyder, Michelle (CMS/OA); Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

How about Thursday, 8/8, starting at 5 pm (or later)? (Henry, we should be back from Culpeper by then, yes?)

From: Harris, Julian
Sent: Thursday, August 01, 2013 4:49 PM
To: 'henry.chao < >; Park, Todd; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; 'Michelle.Snyder < >; 'monique.outerbridge < >
'Todd.Coutts < >; 'Mary.Wallace < >; 'Jon.Booth < >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

I'm unavailable on Friday.

From: Chao, Henry (CMS/OIS) [mailto: < >]
Sent: Thursday, August 01, 2013 04:27 PM
To: Park, Todd; Harris, Julian; Simas, David M.
Cc: Mielke, Dawn M.; Graubard, Vivian; Snyder, Michelle (CMS/OA) < >; Outerbridge,

From: Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Sent: Thursday, August 22, 2013 10:20 AM
To: Park, Todd; Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Khalid, Aryana C. (CMS/OA); Cavanaugh, Alicia A. (CMS/OA); Miller, Ruth A. (CMS/OA)
Subject: Re: CMS visit update -- Wed or Fri next week possible?

I am on vacation next week. We can do the walk through the week of Sept 3rd. Aryana and I will join. Alicia and Sam can coordinate.

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, August 20, 2013 07:07 PM
To: Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Tavenner, Marilyn (CMS/OA)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

Hi Michelle and Henry, one additional note (and looping Marilyn on this as well) if possible, Tara McGuinness would like to join Julian, David Simas, and me on the walkthrough with Marilyn, and Chris Jennings likely will as well.

It should all happen at the same time Marilyn does her walkthrough, so as to economize use of CMS time.

And a date constraint: David Simas will be out starting tomorrow through August 27, so, if possible, it would be great for the walkthrough to happen Aug 28 or later.

When you think you know a date or possible dates, please let me know, and we'll get folks lined up here to go to Baltimore.

Thanks very much!
Todd

From: Park, Todd
Sent: Tuesday, August 20, 2013 9:14 AM
To: 'Michelle.Snyder [REDACTED]'; 'henry.chao [REDACTED]'
Subject: RE: CMS visit update -- Wed or Fri next week possible?

Hi Michelle and Henry, one additional thought: was wondering if I might be able to drop by some evening this week for a few minutes to say hi to the tech team (whomever might be around at that particular moment), bring them cookies (literally), and just say thank you for the massive effort they are putting in during this home stretch. I can only imagine how crazy/intense it must be right now and just wanted to come by for a few minutes to say thank you. And since I'll only be risking my own life, I'll be delighted to drive myself to and from Baltimore to do so ☺ Would it be OK to drop by this week?

From: Park, Todd
Sent: Monday, August 19, 2013 7:38 PM
To: 'Michelle.Snyder [REDACTED]'; 'henry.chao [REDACTED]'
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Hi Michelle and Henry,

Michelle, hope Santa Fe was terrific!

Two quick questions:

1. With respect to the walkthrough with Marilyn (which David, Julian, and I would join), any update on when this will happen? Just want to get calendars aligned....
2. Henry, might you have 5 min in the next few days to chat about a cybersecurity question? I can chat in the evening any time if that is more convenient for you....

Thanks so much,
Todd

From: Snyder, Michelle (CMS/OA) [mailto: [REDACTED]]
Sent: Wednesday, August 07, 2013 09:20 AM
To: Park, Todd; Rzekowski, Kristin; Mielke, Dawn M.; Harris, Julian; Chao, Henry (CMS/OIS) < [REDACTED] >; Simas, David M.; Armstead, Andrea E. (CMS/OA) < [REDACTED] >
Cc: Graubard, Vivian; Outerbridge, Monique (CMS/OIS) < [REDACTED] >; Coutts, Todd (CMS/OIS) < [REDACTED] >; Wallace, Mary H. (CMS/OC) < [REDACTED] >; Booth, Jon G. (CMS/OC) < [REDACTED] >
Subject: Re: CMS visit update -- Wed or Fri next week possible?

Works well for CMS

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto: [REDACTED]]
Sent: Tuesday, August 06, 2013 08:11 PM
To: Rzekowski, Kristin < [REDACTED] >; Snyder, Michelle (CMS/OA); Mielke, Dawn M. < [REDACTED] >; Harris, Julian < [REDACTED] >; Chao, Henry (CMS/OIS); Simas, David M. < [REDACTED] >; Armstead, Andrea E. (CMS/OA) < [REDACTED] >
Cc: Graubard, Vivian < [REDACTED] >; Outerbridge, Monique (CMS/OIS); Coutts, Todd (CMS/OIS); Wallace, Mary H. (CMS/OC); Booth, Jon G. (CMS/OC)
Subject: RE: CMS visit update -- Wed or Fri next week possible?

Hi team, here's a proposed gameplan, which should hopefully ease the degree of scheduling difficulty involved here and also ensure we make judicious use of CMS bandwidth:

1. Team CMS is planning to walk Marilyn through the consumer experience and workflow at some point in the Aug 26-28 date range. I propose that David, Julian, and I join Marilyn for that walkthrough. CMS may host this walkthrough in the Columbia command center, in which case we'd get to check this out as well! Though we have to promise not to touch anything in the command center ☺
2. Separately, Julian would visit CMS in Baltimore to get up to speed on a range of topics he would like to get up to speed on, including the latest with respect to Marketplace ops/IT. It looks like the week of August 19 would be a great week for this (Michelle Snyder is out next week). I suggest that Kristin and Andi work to put together an agenda that would be best for Julian, based on what Julian already knows he wants to cover and additional topics CMS would suggest Julian cover as well. This visit can be Julian solo, without David and me. I would very much like to go if I can, for the Marketplace section of the day in particular but don't let me be a scheduling bottleneck.

From: Park, Todd <[REDACTED]>
>
To: Simas, David M. <[REDACTED]>
; Harris, Julian <[REDACTED]>
McGuinness, Tara <[REDACTED]>
Jennings, Christopher <[REDACTED]>
Cc: marilyn.tavenner <[REDACTED]>
>: Lambrew, Jeanne <[REDACTED]>
michelle.snyder <[REDACTED]>
Khalid, Aryana C. (CMS/OA) <[REDACTED]>
Cavanaugh, Alicia A. (CMS/OA) <[REDACTED]>
Miller, Ruth A. (CMS/OA) <[REDACTED]>
Isabel <[REDACTED]>
>: Jones, <[REDACTED]>
Rzeczkowski, Kristin <[REDACTED]>
Mahoney, Caitria <[REDACTED]>
Mielke, Dawn M. <[REDACTED]>
Graubard, Vivian <[REDACTED]>
Bcc:
Subject: CMS Marketplace walkthrough
Date: Thu Aug 22 2013 14:09:19 EDT
Attachments:

Hi David, Julian, Tara, and Chris,

To follow up on CMS hosting a walkthrough of the Marketplace customer experience – Marilyn would like to host us in Baltimore for this the week of September 3. Alicia Cavanaugh will coordinate. Please let Alicia know if there are additional folks you'd like to bring (Julian was interested in bringing a couple of additional folks), though we should try to keep the total number of people pretty small, if possible.

Cheers,

Todd

From: Simas, David M.
Sent: Wednesday, September 11, 2013 7:50 AM
To: 'Marilyn.Tavenner [REDACTED]'
Cc: 'Aryana.Khalid [REDACTED]'; Park, Todd; Lambrew, Jeanne;
'Alicia.Cavanaugh [REDACTED]'
Subject: Re: demo this morning

Makes sense.

Thanks Marilyn.

From: Tavenner, Marilyn (CMS/OA) [mailto:[REDACTED]]
Sent: Wednesday, September 11, 2013 07:46 AM
To: Simas, David M.
Cc: Khalid, Aryana C. (CMS/OA) <[REDACTED]>; Park, Todd; Lambrew, Jeanne; Cavanaugh, Alicia A. (CMS/OA) <[REDACTED]>
Subject: demo this morning

David-wanted to make you aware that for your demo -we will be working from a demo platform and not "live" on the system.....we did "live" on the system last week for the larger group -but did not want to take the system down today for demo purposes for you or the Secretary as we have an entire team working in Herndon including alpha testers....it will look and feel the same but wanted you to know.....just sent the Secretary the same message...thanks and look forward to seeing you shortly....Marilyn

From: Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Sent: Wednesday, September 11, 2013 7:47 AM
To: Simas, David M.
Cc: Khalid, Aryana C. (CMS/OA); Park, Todd; Lambrew, Jeanne; Cavanaugh, Alicia A. (CMS/OA)
Subject: demo this morning

David-wanted to make you aware that for your demo -we will be working from a demo platform and not "live" on the system.....we did "live" on the system last week for the larger group -but did not want to take the system down today for demo purposes for you or the Secretary as we have an entire team working in Herndon including alpha testers.....it will look and feel the same but wanted you to know.....just sent the Secretary the same message....thanks and look forward to seeing you shortly.....Marilyn

From: Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Sent: Tuesday, September 24, 2013 3:27 PM
To: Park, Todd; Snyder, Michelle (CMS/OA)
Cc: Chao, Henry (CMS/OIS)
Subject: RE: Herndon Information/Instructions

Yes I am very frightened!!

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, September 24, 2013 3:23 PM
To: Snyder, Michelle (CMS/OA); Tavenner, Marilyn (CMS/OA)
Cc: Chao, Henry (CMS/OIS)
Subject: Re: Herndon Information/Instructions

Will absolutely obey all instructions with precision!! And really looking forward to the visit -- and more than anything, thanking everyone from the bottom of our collective hearts for the truly incredible work they are doing :)

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Tuesday, September 24, 2013 02:42 PM
To: Park, Todd; Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Cc: Chao, Henry (CMS/OIS) <[REDACTED]>
Subject: Herndon Information/Instructions

I have requested that the security cameras at Herndon be loaded with facial recognition software so that if either of you wander into a restricted area armed with a set of questions alarms will sound. Henry has been issued a government taser if the visit extends beyond an hour or if Todd looks for a later ride home.....that ought to scare both of you.....Henry, armed and dangerous ☺

Enjoy the visit.

Michelle

A.Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

From: Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Sent: Tuesday, September 24, 2013 6:36 PM
To: Snyder, Michelle (CMS/OA); Park, Todd
Cc: Chao, Henry (CMS/OIS)
Subject: Re: Herndon Information/Instructions

I kept Todd under control(well sort of). Henry thanks for a great visit!!!

From: Snyder, Michelle (CMS/OA)
Sent: Tuesday, September 24, 2013 02:42 PM
To: Park, Todd ([REDACTED]) <[REDACTED]>; Tavenner, Marilyn (CMS/OA)
Cc: Chao, Henry (CMS/OIS)
Subject: Herndon Information/Instructions

I have requested that the security cameras at Herndon be loaded with facial recognition software so that if either of you wander into a restricted area armed with a set of questions ala rms will sound. Henry has been issued a government taser if the visit extends beyond an hour or if Todd looks for a later ride home.....that ought to scare both of you.....Henry, armed and dangerous ☺

Enjoy the visit.

Michelle

A.Michelle Snyder
Chief Operating Officer
DHHS/CMS/OA
[REDACTED]

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Tuesday, June 11, 2013 8:29 PM
To: Park, Todd
Cc: Graubard, Vivian; Snyder, Michelle (CMS/OA)
Subject: Re: Sync-up

Hi Todd,

I am out next week so probably the week after will work for me.

As for issue around logos, I'm not sure you have the complete scoop but I suppose this issue got to you because people can't accept that we can't do this as easily as one might think and the fallout from catering to the Blues (as opposed to the AHIP members) will triple the confusion and cause more grief than we can handle. In addition because I have looked at this carefully along with Mary Wallace, Jon Booth, Jim Kerr, Michelle, and our developers (and including the BCBSA IT leads that think it's as easy as changing colors on a website), if you twist my arm and make me do magic to render logos correctly for 100% of the QHPs in millions of plan compare results where I have to map/link to a data source outside of HIOS, well, it would just make a liar out of me for saying no when someone can make me say yes.

If you want to talk about this then call me any time. If we're going to talk logos at this one hour catch-up session it will then not be a great use of our time and may get me in to more trouble because no one will believe me anymore because I hold the line on something that in the grand scheme no one would really want us to trade off for more risk.

Thanks for understanding.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244
[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, June 11, 2013 07:52 PM
To: Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Tavenner, Marilyn (CMS/OA); VanRoekel, Steven <[REDACTED]>; Graubard, Vivian <[REDACTED]>; Lynch, Laura <[REDACTED]>
Subject: Sync-up

Hi Michelle and Henry, hope all is terrific with you!

As you've heard from Marilyn, would love (with Steve) to arrange time (1 hour) in the next week or week and half to check in on how things are going with respect to Marketplace IT dev and testing. (And also to discuss the tactical question of issuer logos). Would love to arrange a visit to Baltimore, but given how crazy schedules are, I'm guessing that a videoconference or conference call would be more feasible.

From: Graubard, Vivian
Sent: Friday, June 28, 2013 8:54 AM
To: Chao, Henry (CMS/OIS); Park, Todd
Subject: RE: Follow-up

Let's go with July 16th from 4-8. Does that still work? Does anyone else from WH need to join?

Thanks,
Viv

From: Chao, Henry (CMS/OIS) [mailto:████████████████████]
Sent: Wednesday, June 26, 2013 11:16 PM
To: Park, Todd
Cc: Graubard, Vivian
Subject: Re: Follow-up

Todd,

For planning purposes I am blocking the following dates and times. Let me know which works for you. Thanks!

Monday July 8 5pm to at least 9pm
Tuesday July 9 4pm to at least 8pm
Monday July 15 5pm to at least 9pm
Tuesday July 16 4pm to at least 8pm

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

██████████ (Pri)
██████████ (Alt)
██████████ (BB)

From: Park, Todd [mailto:████████████████████]
Sent: Wednesday, June 26, 2013 05:34 PM
To: Tavenner, Marilyn (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Subject: Follow-up

Logos

Hi Marilyn, Michelle, and Henry,

After talking with Henry and team, I spoke with Mark about the logo issue, and explained why attempting to add logos for October 1 is extremely unwise. He understands. He may want me to get on the phone with someone from the Blues so they fully understand it. I'm more than happy to do so on your behalf this issue should not consume any more of your time.

From: Chao, Henry (CMS/OIS) <[REDACTED]>
Sent: Wednesday, June 26, 2013 1:52 PM
To: Park, Todd; Snyder, Michelle (CMS/OA)
Cc: Kerr, James T. (CMS/CMHPO); Wallace, Mary H. (CMS/OC); Outerbridge, Monique (CMS/OIS); Bowen, Marianne (CMS/OA)
Subject: Re: Draft writeup

Here's the write-up. I'm sending and copying those who are key to supporting this assertion.

Attempting to integrate logos into the FFM for October 1, 2014 is not possible with less than 100 days left. This is not because the "concept" of integrating a logo is by itself a difficult thing to do. In reality and practice it's not possible at this point because of inter-dependencies with other processes, the already underway testing processes with dedicated test data, schedule/lack of time, and resource constraints. Specifics are:

The operational execution process of acquiring logos requires coordination with NAIC and their SERFF system since Issuers in approximately 11 or so FFM states submit their data through the SERFF system and not directly to HIOS (this was a policy decision made late last summer). Any change in how Issuers submit data and how it ends up as part of the FFM operations requires coordination not just with Issuers but also with NAIC and their SERFF development and operations team.

The logo by itself may be considered as a simple image object, but in reality is still a piece of data that needs to be managed in a structured and controlled manner in order to display it properly each and every time. If the Logo/data was not factored in the design of how data are submitted as part of the QHP process, that means it has to be done in a "one-off" manner outside of the established automated processes for Plan Compare. Outside of the automated process will mean the ability to attach the correct logo to the right row or column of Plan Compare results (rendered literally millions of times from consumers constantly requesting compare results for their input to appreciate the volume of transactions just think in terms of consumers seeing responses to their search when they provide input to Priceline, Expedia, Travelocity, etc. except in this case it's multiplied by the number of consumers coming in to the FFM and their requests to compare plans).

At this time amidst the final stages of working with Issuers, DOIs, and NAIC to finalize a validated set of QHP data nationally by July 31, 2013, altering HIOS, getting NAIC to alter SERFF, and working with Issuers that may or may not voluntarily submit logos is not feasible and endangers the ability to stay on schedule. Collecting any additional data from Issuers via templates or some other process, loading these data either directly into the HIOS system or outside the HIOS system in a manually established data store and process, validating the data, have NAIC SERFF send the new logo data separately from QHP data to CMS, and having the rating engine retrieve and render that data when the FFM design and build process has been locked down and we are in the middle of crunch-time between now to October 1, would introduce significant risk to getting the FFM fundamental capabilities in place for open enrollment. Think of it as trying to change a gear in an airplane engine in mid-flight. Or adding a new field to an IRS tax form in the middle of filing season. As an isolated act without the constraints of schedule and scope, adding the data isn't impossible. What's impossible is the notion of adding it to the tax form via a system modification when that system is going through an intense time, with a lot of moving parts involved, and where a wrong move could actually screw the whole system up and in the case of attempting to add a logo and screwing that up means we will adversely impact enrollment and the consumer experience.

There exists the notion that as an alternative to changing the core plan data submission/management process and systems (i.e., modifying the carrier plan data templates, HIOS, the QHP database, and rating engine logic) would be to set up a separate database of logos outside this core data and process already in place with QHP

submission in conjunction with NAIC and have the FFM system, when rendering a given Issuer's QHP product, pull separately from both the QHP database plus the logo database and then "join" the results and display to the consumer. This is a terrible idea technically, would be extremely prone to error, and still creates the issue of mucking with the jet engine while it's in flight.

The current commitment to the scope and delivery schedule to make October 1, 2013 is locked down in terms of committed hours from our contractors. Anything that was not part of scope means we have to negotiate across the board with CCIO, CMCS, OC, and our contractors to find hours to take away and recommit to this effort there are no available hours at this point to freely use as commitment arise that were not planned months in advance and funded as part of a contract.

The right way to add logos to the FFM would be to modify the core plan data submission/management process and systems to include logos as part of the Issuer QHP product templates and be able to process logos in an automated, structured, and high precision all the way through. This is not possible for Oct 1, 2013 without introducing significant operational risk to the go-live, as discussed above. We suggest considering it as part of a future release, post October 1 understanding that it will have to compete with a lot of priorities. The reasonable thing to do would be to target making this modification in time for the next cycle of plan bids in 2014 starting with the Payment Notice for 2015 that will be released in the March 2014 timeframe and logos can start flowing in as part of QHP submission in the June -July 2014 timeframe.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services

From: Todd Park <[REDACTED]>
Date: Wed, 26 Jun 2013 02:03:17 +0000
To: Michelle Snyder <[REDACTED]>, HENRY CHAO <[REDACTED]>
Subject: RE: Draft writeup

Attempting to integrate logos into the FFM for October 1 is not advisable. This is not because the act of integrating a logo is by itself a difficult thing to do. It's because the process for collecting health plan and product data from carriers via templates, loading these data into the HIOS system, validating the data, transferring the data from HIOS into the FFM QHP database, and having the rating engine retrieve and render that data in the FFM has been locked down, and is being utilized to support plan data collection/validation and system testing as we speak. Changing the underlying plan data template and processing routine right now -- by adding a new plan data element, the logo -- during the crunch-time sprint we're in from now to October 1, would introduce significant risk. Think of it as trying to change a gear in an airplane engine in mid-flight. Or adding a new field to an IRS tax form in the middle of filing season. As an isolated act, adding the field isn't hard. What's hard is the notion of adding it to the tax form via a system modification when that system is going through an intense time, with a lot of moving parts involved, and where a wrong move could actually screw the whole system up.

An alternative to changing the core plan data submission/management process and systems (i.e., modifying the carrier plan data templates, HIOS, the QHP database, and rating engine logic) would be to set up a database of logos outside this core data management process and have the FFM system, when rendering a given insurance product, pull from both the QHP database plus the logo database. This is a terrible idea technically, would be prone to error, and still creates the issue of mucking with the jet engine while it's in flight.

From: Tavenner, Marilyn (CMS/OA) <[REDACTED]>
Sent: Wednesday, June 26, 2013 5:56 PM
To: Park, Todd; Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Cc: Khalid, Aryana C. (CMS/OA)
Subject: Re: Follow-up

Thanks Todd. Appreciate the help as always!!!!

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, June 26, 2013 05:34 PM
To: Tavenner, Marilyn (CMS/OA); Snyder, Michelle (CMS/OA); Chao, Henry (CMS/OIS)
Subject: Follow-up

Hi Marilyn, Michelle, and Henry,

After talking with Henry and team, I spoke with Mark about the logo issue, and explained why attempting to add logos for October 1 is extremely unwise. He understands. He may want me to get on the phone with someone from the Blues so they fully understand it. I'm more than happy to do so on your behalf this issue should not consume any more of your time.

Marilyn, I'm also going to visit with Henry and team for one of our evening deep -dive sessions to get up to speed on the latest status of IT and testing during the week of July 8. Michelle, Henry, and I had a check-in call today, but I think that Henry is right that to really understand current status and next steps, there is no substitute for an evening deep -dive. So I'll bring healthy food and snacks to Baltimore and camp out with Henry and team for a few hours ☺

All the best,
Todd

The right way to add logos to the FFM would be to modify the core plan data submission/management process and systems to include logos as part of the carrier plan/product template and be able to process logos all the way through. This is not doable for Oct 1 without introducing significant operational risk to the go-live, as discussed above. We suggest considering it as part of a future release, post October 1 understanding that it will have to compete with a lot of priorities. The reasonable thing to do would be to target making this modification in time for the next cycle of plan bids, in 2014.

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Tuesday, June 25, 2013 5:48 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Subject: RE: Draft writeup

Looks good.....

A. Michelle Snyder
Deputy Chief Operating Officer
DHHS/CMS
[REDACTED]

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, June 25, 2013 1:13 AM
To: Chao, Henry (CMS/OIS); Snyder, Michelle (CMS/OA)
Subject: Draft writeup

Please keep close hold loop in folks who can help with the details, but don't circulate broadly yet, if you don't mind. Let me know if this sounds right any corrections/edits/additions/deletions welcome:

Attempting to integrate logos into the FFM for October 1 is not advisable. This is not because the act of integrating a logo is by itself a difficult thing to do. It's because the process for collecting health plan and product data from carriers via templates, loading these data into the HIOS system, validating the data, transferring the data from HIOS into the FFM QHP database, and having the rating engine retrieve and render that data in the FFM has been locked down, and is being utilized to support plan data collection/validation and system testing as we speak. Changing the underlying plan data template and processing routine right now -- by adding a new plan data element, the logo -- during the crunch-time sprint we're in from now to October 1, would introduce significant risk. Think of it as trying to change a gear in an airplane engine in mid-flight. Or adding a new field to an IRS tax form in the middle of filing season. As an isolated act, adding the field isn't hard. What's hard is the notion of adding it to the tax form via a system modification when that system is going through an intense time, with a lot of moving parts involved, and where a wrong move could actually screw the whole system up.

An alternative to changing the core plan data submission/management process and systems (i.e., modifying the carrier plan data templates, HIOS, the QHP database, and rating engine logic) would be to set up a database of logos outside this core data management process and have the FFM system, when rendering a given insurance product, pull from both the QHP database plus the logo database. This is a terrible idea technically, would be prone to error, and still creates the issue of mucking with the jet engine while it's in flight.

The right way to add logos to the FFM would be to modify the core plan data submission/management process and systems to include logos as part of the carrier plan/product template and be able to process logos all the way through. This is not doable for Oct 1 without introducing significant operational risk to the go-live, as discussed above. We suggest considering it as part of a future release, post October 1 understanding that it will have to compete with a lot of priorities. The reasonable thing to do would be to target making this modification in time for the next cycle of plan bids, in 2014.

From: Jennings, Christopher
Sent: Wednesday, July 17, 2013 8:33 PM
To: Park, Todd; Childress, Mark; marilyn.tavener [REDACTED]; Lambrew, Jeanne
Subject: RE: BCBSA conversation update

Thanks Todd. This is helpful information for me to know because the plans are always appealing things. Having said, as per usual, your standing with these folks goes a long way to acceptance. Look forward to getting together. You will be hearing from me to get on your schedule shortly. Thanks for all.

Chris

From: Park, Todd
Sent: Wednesday, July 17, 2013 7:44 PM
To: Childress, Mark; marilyn.tavener [REDACTED]; Lambrew, Jeanne; Jennings, Christopher
Subject: BCBSA conversation update

Hi Mark, Marilyn, Jeanne, and Chris,

Spoke with BCBSA this morning Justine Handelman, Bill O'Loughlin, and Jeannette Ekh.

Was a very good conversation. I explained that we were 100% supportive of adding logos, but that doing so for October 1 was very-high-risk, and explained why in detail. They said that they understood and they very much understood the importance of focusing on mission-critical, core operational execution to support a successful October 1 go-live, which is in everyone's best interest.

They asked about whether logos might be doable for Nov or Dec. I said that we could definitely do logos for the next cycle of plan bids and data submission in 2014 (March 2014 notice, QHP data submission in June/July 2014), and that this would be the logical time to do it. Doing logos before then would require out-of-cycle plan data submission/validation/retrieval/presentation work, and furthermore, that we should expect Oct 2013-Jan 2014 to be a very, very busy time as we execute improvements to the core operation based on what we learn post go-live and as we develop, test, and deploy back-end modules to power financial management and plan payment beginning in Jan 2014.

It sounded like they understood this as well. They appreciated that we were very supportive of doing logos, and appreciated the need to focus on core ops/IT execution in the near-term.

As we discussed, I interwove into the discussion our desire to start ongoing dialogue between CMS and issuer ops/tech people ASAP, to coordinate, test, and prep for Oct 1. I also said that we were very supportive of the idea of having issuer tiger teams and our Marketplace Ops Center collaborate closely on and post Oct 1 which would be a natural outgrowth of the CMS-issuer ops dialogue we start now.

They were very enthusiastic about this, and said that it closely mirrored their own thinking as well they have actually worked on recommendations for how to proceed with issuer-CMS op/tech collaboration, which they'll be sending to CMS shortly. I said that CMS would be reaching out to issuers ASAP as well. They said that getting started "tomorrow" with ops/tech dialogue would be great, that this collaboration would be a key success factor, and that we're all on the same team.

They'll report back to their board on the logo issue – and will also let the board know about our desire to engage in ongoing collaborative ops/tech dialogue and work. They said that their board would be super-supportive of engaging

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They'll report back to their board on the logo issue -- and will also let the board know about our desire to engage in ongoing collaborative ops/tech dialogue and work. They said that their board would be super-supportive of engaging asap in closer dialogue/collaboration. Hopefully, the board will understand what's logical to do with logos as well Justine and team said that they would articulate the context and explanation, and said that they thought the board would understand the need to focus on mission-critical work in the near-term.

Please let me know if you have any questions!

Cheers,
Todd

From: Childress, Mark
Sent: Wednesday, July 17, 2013 10:34 PM
To: Park, Todd; 'marilyn.tavener'; Lambrew, Jeanne; Jennings, Christopher
Subject: Re: BCBSA conversation update

Thx v much for doing that todd

From: Park, Todd
Sent: Wednesday, July 17, 2013 07:44 PM
To: Childress, Mark; marilyn.tavener; <>; Lambrew, Jeanne; Jennings, Christopher
Subject: BCBSA conversation update

Hi Mark, Marilyn, Jeanne, and Chris,

Spoke with BCBSA this morning Justine Handelman, Bill O'Loughlin, and Jeannette Ekh.

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From: Park, Todd
Sent: Sunday, July 21, 2013 7:10 PM
To: 'Justine.Handelman [mailto:]'
Cc: 'mara.baer [mailto:]'; 'Marilyn.Tavener [mailto:]'; 'Aryana.Khalid [mailto:]'
Graubard, Vivian; Paris, Randy
Subject: Re: Thanks and Follow-Up

Hi Justine, it was terrific speaking with you and team, and am looping Marilyn and Aryana on the next steps below -- they have been working on the plan to amp-up technical and operational collaboration between CMS and issuers, which we all agree strongly will be key to success in the lead-up to Oct 1 and beyond.

Marilyn/Aryana, I don't want to be a scheduling bottleneck, as time is of the essence, but would be delighted to participate in any key planning calls for the next phase of work. (Randy/Vivian, cc: d, manage my schedule, and your office can reach out to them anytime -- and again, please don't let me be a bottleneck!)

All the best, and go team go!
Todd

From: Handelman, Justine [mailto:]
Sent: Sunday, July 21, 2013 11:36 AM
To: Park, Todd
Cc: Baer, Mara < [mailto:] >
Subject: Thanks and Follow-Up

Todd,

Thanks so much for the call last week. As we shared, logos are a top priority for our Plans because we know how important it will be for consumer shopping but we understand the constraints you are under given all that has to get done before open enrollment.

As we discussed, Plans are working very hard to be ready day 1 but that is only possible if we can be in complete sync with the federal government which will require an open process of sharing operational timelines and detailed operations/IT plans with the issuer community. We are in very close contact with all the CMS staff working on implementation and are currently developing a detailed list of what we need from the agencies to make sure we're all prepared. We would like to share that information with you as well and continue a dialogue about how we work together.

We appreciated hearing about the plans being put together quickly for regular meetings with Administration and Plan technical people to ensure readiness for Oct 1st as well as the "tiger teams" and operations center being developed. Plans are very eager to hear more about these efforts so they can shore up their operations, systems and staffs to be ready. Perhaps we can schedule a call soon to hear more about these activities and timing for plan engagement?

Thanks so much,

Justine

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Saturday, August 24, 2013 3:57 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Kerr, James T. (CMS/CMHPO); Outerbridge, Monique (CMS/OIS)
Subject: Re: Additional surges?

We have added some folks and are making arrangements to add others as needed. We need to approach this in a very controlled fashion and not overwhelm CGI or QSSI. On Monday we are walking through the assessment as a result of the thursday through sunday reviews

No further resource action at this time

Thanks

Michelle

Sent from my BlackBerry Wireless Device

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, August 24, 2013 02:38 PM
To: Chao, Henry (CMS/OIS); Snyder, Michelle (CMS/OA)
Cc: Kerr, James T. (CMS/CMHPO); Outerbridge, Monique (CMS/OIS)
Subject: Additional surges?

Also, Michelle and Henry – are there any other resource "surges" like the Red Hat surge that you would like to make happen, drawing in additional resources from contractors/subcontractors or Federal employee detailees from other agencies (e.g., Presidential Innovation Fellow developers who could be detailed quickly to CMS)? In the spirit of throwing absolutely everything the US Government can into the fight, please let me know if there is any other surge that you'd like to make happen -- anything at all that could be helpful! Email or call me anytime – weekend and evenings included, 24-7, at [REDACTED]

Todd

From: Park, Todd
Sent: Friday, August 23, 2013 03:37 PM
To: Chao, Henry (CMS/OIS) <[REDACTED]>; Graubard, Vivian; Mielke, Dawn M.
Cc: Snyder, Michelle (CMS/OA) <[REDACTED]>; Kerr, James T. (CMS/CMHPO) <[REDACTED]>; Outerbridge, Monique (CMS/OIS) <[REDACTED]>
Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Henry, you did a terrific job on the call and conceiving this whole Red Hat surge play. Viva la developer surge!! It sounds like Red Hat is really going to lock in and deliver the goods please keep me posted regarding the actual materialization of the surge and if I should call Red Hat to keep applying pre ssure. Also, as we all discussed, please let me know if I need to talk with other folks across government to explain why their best Red Hat developers are moving immediately to the Marketplace project ☺

Great job, go team go, and semper fi,
Todd

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Friday, August 23, 2013 2:38 PM
To: Park, Todd; Graubard, Vivian; Mielke, Dawn M.
Cc: Snyder, Michelle (CMS/OA); Kerr, James T. (CMS/CMHPO); Outerbridge, Monique (CMS/OIS)
Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

yup

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Park, Todd [mailto: [REDACTED]]
Sent: Friday, August 23, 2013 2:37 PM
To: Chao, Henry (CMS/OIS); Graubard, Vivian; Mielke, Dawn M.
Cc: Snyder, Michelle (CMS/OA); Kerr, James T. (CMS/CMHPO); Outerbridge, Monique (CMS/OIS)
Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

OK, terrific. Will they have the slides? And will you lead the talkthrough of the slides?

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Friday, August 23, 2013 2:36 PM
To: Park, Todd; Graubard, Vivian; Mielke, Dawn M.
Cc: Snyder, Michelle (CMS/OA); Kerr, James T. (CMS/CMHPO); Outerbridge, Monique (CMS/OIS)
Subject: FW: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates
Importance: High

This is what we will use for discussion points. Red Hat execs are available at 3pm. QSSI and CGI will both be on the call along with me.

Appointment is coming in a few min.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Karlton Kim [mailto: [REDACTED]]
Sent: Friday, August 23, 2013 2:21 PM
To: Chao, Henry (CMS/OIS); Sharma, Hemant (CGI Federal); Campbell, Cheryl (CGI Federal); Martin, Rich (CGI Federal);

Manambedu, Lakshmi (CGI Federal)

Cc: Outerbridge, Monique (CMS/OIS); Oh, Mark U. (CMS/OIS)

Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Karlton Kim

Sr. Vice President of Program Delivery

10480 Little Patuxent Parkway, Suite 1100, Columbia MD 21044

Office [REDACTED] | mobile [REDACTED]

From: Karlton Kim <[REDACTED]>

Date: Friday, August 23, 2013 2:19 PM

To: "henry.chao" <[REDACTED]>, Hemant Sharma <[REDACTED]>,
"Campbell, Cheryl (CGI Federal)" <[REDACTED]>, Rich Martin <[REDACTED]>,
"lakshmi.manambedu" <[REDACTED]>

Cc: Monique Outerbridge <[REDACTED]>, Mark Oh <[REDACTED]>

Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

This is where I'm going with it. Haven't received the RedHat execs yet.

Karlton Kim

Sr. Vice President of Program Delivery

10480 Little Patuxent Parkway, Suite 1100, Columbia MD 21044

Office [REDACTED] | mobile [REDACTED]

From: <Chao>, "henry.chao" <[REDACTED]>

Date: Friday, August 23, 2013 2:06 PM

To: Karlton Kim <[REDACTED]>, Hemant Sharma <[REDACTED]>, "Campbell, Cheryl (CGI
Federal)" <[REDACTED]>, Rich Martin <[REDACTED]>,
"lakshmi.manambedu" <[REDACTED]>

Cc: Monique Outerbridge <[REDACTED]>, Mark Oh <[REDACTED]>

Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Is it soup yet?

Henry Chao

Deputy CIO & Deputy Director,

Office of Information Services

Centers for Medicare & Medicaid Services

[REDACTED]

From: Karlton Kim [mailto:[REDACTED]]

Sent: Friday, August 23, 2013 1:06 PM

To: Chao, Henry (CMS/OIS); Sharma, Hemant (CGI Federal); Campbell, Cheryl (CGI Federal); Martin, Rich (CGI Federal); Manambedu, Lakshmi (CGI Federal)

Cc: Outerbridge, Monique (CMS/OIS); Oh, Mark U. (CMS/OIS)

Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Importance: High

OK,

Karlton Kim
Sr. Vice President of Program Delivery
10480 Little Patuxent Parkway, Suite 1100, Columbia MD 21044
Office [REDACTED] | mobile [REDACTED]

From: <Chao>, "henry.chao [REDACTED]" <[REDACTED]>
Date: Friday, August 23, 2013 1:00 PM
To: Karlton Kim <[REDACTED]>, Hemant Sharma <[REDACTED]>, "Campbell, Cheryl (CGI Federal)" <[REDACTED]>, Rich Martin <[REDACTED]>, "lakshmi.manambedu [REDACTED]" <[REDACTED]>
Cc: Monique Outerbridge <[REDACTED]>, Mark Oh <[REDACTED]>
Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Karlton,

Please take what Hemant has put together as a single set of skills and delineate between what skills are needed by each side and put that in an agenda/talking points for todd and I the call at 3pm. Need the names of the Red hat execs. too

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Karlton Kim [mailto:[REDACTED]]
Sent: Friday, August 23, 2013 12:53 PM
To: Sharma, Hemant (CGI Federal); Chao, Henry (CMS/OIS); Campbell, Cheryl (CGI Federal); Martin, Rich (CGI Federal); Manambedu, Lakshmi (CGI Federal)
Cc: Outerbridge, Monique (CMS/OIS); Oh, Mark U. (CMS/OIS)
Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Yes, I will have the dial in, and I will add anything additional we may have to your list

Karlton Kim
Sr. Vice President of Program Delivery
10480 Little Patuxent Parkway, Suite 1100, Columbia MD 21044
Office [REDACTED] | mobile [REDACTED]

From: <Sharma>, Hemant Sharma <[REDACTED]>
Date: Friday, August 23, 2013 12:47 PM
To: Karlton Kim <[REDACTED]>, "henry.chao [REDACTED]" <[REDACTED]>, "Campbell, Cheryl (CGI Federal)" <[REDACTED]>, Rich Martin <[REDACTED]>

"lakshmi.manambedu [REDACTED]" <[REDACTED]>
Cc: Monique Outerbridge <[REDACTED]>, Mark Oh <[REDACTED]>
Subject: RE: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Hi Henry,

Here is what we can use help with from Red Hat:

1. Java Enterprise (JEE) architects/developers (4 resources) - the expectation is for these resources to be part of a SWAT team to help with:
 - a. Analysis/identification, debugging, and resolution of issues related to FFM application design - one recent example is session management that Mark White from RedHat is helping with.
 - b. Since these are JEE architects/developers they will also help with development activities within the various teams. Resources that have experience with user interface development especially Javascript/Backbone would be very helpful for example resources like Trevor Quinn from RedHat.
2. JBoss SOA-P Performance Tuning (2 resources) the expectation is that these resources will help with the identification and resolution of issues related to JBoss SOA-P performance and scalability.
3. JBoss Operations (1 resource) the expectation is that this resource will help with operations and administration related activities of the JBoss middleware infrastructure such as shell scripting to automate administration/monitoring tasks and experience with JBoss Operations Network. One example resource from RedHat in this category is Ovidiu Feodorov.

Karlton, not sure if you are looking for similar resources, but am guessing there will be some overlap. Let me know if you would like to talk realtime. Also, seems like you have the RedHat contact identified and I don't need to get a different name.

Thanks,
Hemant

Hemant Sharma | Vice President, CGI Federal | 12601 Fair Lakes Circle, VA, 22033 | Office [REDACTED] | Mobile [REDACTED]
[REDACTED] www.cgi.com

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From: Karlton Kim [mailto:[REDACTED]]
Sent: Friday, August 23, 2013 11:25 AM
To: Chao, Henry (CMS/OIS); Campbell, Cheryl (CGI Federal); Martin, Rich (CGI Federal); Sharma, Hemant (CGI Federal); Manambedu, Lakshmi (CGI Federal)
Cc: Outerbridge, Monique (CMS/OIS); Oh, Mark U. (CMS/OIS)
Subject: Re: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates
Importance: High

Yes. We will give you skill set / expertise.

Karlton Kim
Sr. Vice President of Program Delivery
10480 Little Patuxent Parkway, Suite 1100, Columbia MD 21044
Office [REDACTED] | mobile [REDACTED]

From: <Chao>, "henry.chao [REDACTED]" <[REDACTED]>
Date: Friday, August 23, 2013 11:21 AM
To: Karlton Kim <[REDACTED]>, "Campbell, Cheryl (CGI Federal)" <[REDACTED]>, Rich Martin <[REDACTED]>, Hemant Sharma <[REDACTED]>, "lakshmi.manambedu [REDACTED]" <[REDACTED]>
Cc: Monique Outerbridge <[REDACTED]>, Mark Oh <[REDACTED]>
Subject: Recruiting a top notch Red Hat team to assist in the Pods to ensure quality and ability to meet targeted dates

Todd Park requested that we provide him the right contact at Red Hat so he can request Red Hat to provide their top hands-on experts (Developers, Engineers, Testers, Performance, Architects, troubleshooters, etc.) to our CGI and QSSI vehicles. We already have a few really good people and we can benefit from this offer to round up more of the best to work with us.

Here's what I need:

Hemant and Karlton please list the skillsets you believe we have a gap in or need more of for Red Hat at the level of expertise greater than what we currently have access to. Also talk to your Red Hat Contacts to get the right executive listed on the following page for Todd to call (and ask your Red Hat contact for the information for Todd).

<http://www.redhat.com/about/company/management/>

Please get that back to me before 3pm. Does that work?

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Fasching, Laura <[REDACTED]>
Sent: Sunday, September 29, 2013 1:53 AM
To: Park, Todd; 'henry.chao' [REDACTED]
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Understood and I will call you if we hit a snag .
Thanks

-----Original Message-----

From: Park, Todd ([REDACTED])
Sent: Sunday, September 29, 2013 01:47 AM Eastern Standard Time
To: Fasching, Laura; 'henry.chao' [REDACTED]
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Laura, terrific, thanks! If you run into issues, no matter what hour it is, please call me at [REDACTED] -- my phone will be on and next to my ear all night; please don't hesitate to call at any hour. And we can trigger the backup option at literally any hour of the night if need be.

Thanks!
Todd

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Sunday, September 29, 2013 01:25 AM
To: Park, Todd; 'henry.chao' [REDACTED] <[REDACTED]>
Cc: Fasching, Laura <[REDACTED]>
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Ok thanks Todd, we are good for now the shippers are at the data center getting ready to pick up the gear now. We will let you know if we run into any issues and need the back up options.
Thanks
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Sunday, September 29, 2013 12:08 AM
To: Fasching, Laura; 'henry.chao' [REDACTED]
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Laura, can you let us know when the shippers do indeed pick up the equipment from Miami and that the private cargo transport play is officially in motion and good to go?

We in fact have ascertained that military transport is available as a backup option in case the commercial option falls through at the last second -- but the commercial option is more cost-effective. However, if the commercial shippers

flake out, we can activate the military option -- folks are standing by.

From: Fasching, Laura [mailto:]
Sent: Saturday, September 28, 2013 10:46 PM
To: Park, Todd; Chao, Henry (CMS/OIS) < >
Cc: Fasching, Laura < >
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Glad to help, let me know if you need anything else gentlemen ☺
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel:
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:]
Sent: Saturday, September 28, 2013 10:38 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpe per?

That is super-awesome Laura, thanks so very, very, very much!!!!

From: Fasching, Laura [mailto:]
Sent: Saturday, September 28, 2013 10:36 PM
To: Chao, Henry (CMS/OIS); Park, Todd
Cc: Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Todd & Henry,

The shipper is picking up the equipment in the next 90 minutes from the Miami data center and we expect the shipment to arrive between 9:30 AM to 10:00 AM. ☺

So Monday COB is looking good as long as we keep the shippers on schedule, as the build teams will be working at 6 am with the equipment that was brought in today.

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel:
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Chao, Henry (CMS/OIS) [mailto:]
Sent: Saturday, September 28, 2013 9:03 PM
To: Fasching, Laura; 'Todd Y Park < >
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpe per?

I got the approval from our COO and head of Contracts to go with the 40k option.

Contracts said we will have to work out how this can be a line you can bill in the contract but no problem figuring that out later.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 09:00 PM
To: Park, Todd <[REDACTED]>; Chao, Henry (CMS/OIS)
Cc: Fasching, Laura <[REDACTED]>
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Ok great Henry can I get confirmation that the Government will Pay for the plane? We have to get David Small's Approval so we will need to call him as soon as possible.

Thanks and sorry to rush you all.

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 8:50 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

FYI, the private plane option I am pursuing would likely cost about the same as the Fedex expedite cargo plane option below.

Henry, I think that delivery to the data center mid -day Sunday sounds really, really, really good....

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 8:46 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?
Importance: High

Ok here is what I was able to do
I was able to get to FedEx custom Critical they can drive it to us via a truck with pick up tonight @ 11:00 PM (ish) and delivery around 9 PM on Sunday night for \$3700.00
Or
They have an expedite cargo plane option which would get all 6 pallets on the plane (insured/ bonded) and get the delivery to the data center by mid-day Sunday which still gives us a good amount of time to work on the configurations. The cost however is \$40,000.00.

If you would want to move on either of these options let me know as we need Henry to approve the costs.

Thanks
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 8:37 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

OK, have reached a private plane broker. They are investigating ASAP. I told them Miami to Dulles was the desired flight path is that correct?

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 8:10 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Quantity 6 200.00 lb pallets Dimensions 39x25x33

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 7:58 PM
To: Chao, Henry (CMS/OIS); Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

OK you can call me at [REDACTED] or [REDACTED]

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 7:57 PM
To: 'laura.fasching@[REDACTED]'; Park, Todd
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpeper ?

I'll call and patch you both in

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244
[REDACTED] (Pri)

[REDACTED] (Alt)
[REDACTED] (BB)

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 07:56 PM
To: Park, Todd <[REDACTED]>; Chao, Henry (CMS/OIS)
Cc: Fasching, Laura <[REDACTED]>
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

[REDACTED] I am available of course ☺

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 7:55 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Hi Laura, can you get on the phone for a moment to discuss? What's the best number at which to reach you?

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 7:53 PM
To: Park, Todd; Chao, Henry (CMS/OIS)
Cc: Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Ok I have confirmed our Air force option is a go and is the best option as we will have the build resources available for the full build and be able to deliver that on Monday

We are working with trucking companies now to get a truck to pick up sometime tomorrow and direct ship it to us again the equipment would not get here until Monday morning at the earliest and then you're looking at Wednesday/Thursday delivery and at that point we should go with our original shipping plan:

And lastly we are having a challenge on getting the logistics aligned for a chartered cargo plane, it looks like we may not be able to get that arranged until Monday morning and would not know until then when they could pick & deliver the equipment - so this option would need to be explored in depth on Monday.

This is what we have at this point.
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Saturday, September 28, 2013 7:34 PM
To: Chao, Henry (CMS/OIS); Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Laura, by when do you need to make a decision about whether to send via private ground, private cargo plane, or Air Force (if Air Force is indeed an option?)

And to confirm private ground would deliver the hardware on Tuesday (to be installed Wednesday?), private cargo plane would deliver the hardware on Monday (to be installed Tuesday?). With no possibility of acceleration of those timetables?

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Saturday, September 28, 2013 7:29 PM
To: 'laura.fasching [REDACTED]'; Park, Todd
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Todd--it's in your hands now to make a quick decision.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Fasching, Laura [mailto: [REDACTED]]
Sent: Saturday, September 28, 2013 07:27 PM
To: Park, Todd < [REDACTED] >; Chao, Henry (CMS/OIS)
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

We have been exploring that option too but no luck so far

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto: [REDACTED]]
Sent: Saturday, September 28, 2013 7:26 PM
To: Chao, Henry (CMS/OIS); Fasching, Laura
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Also: as another option to explore, in the interest of exploring all options simultaneously, is it possible to arrange for heroic chartered private sector ground transportation that could get going super -early tomorrow morning and get to Culpeper by Sunday evening?

From: Park, Todd
Sent: Saturday, September 28, 2013 7:03 PM
To: 'Chao, Henry (CMS/OIS)'; 'laura.fasching [REDACTED]'
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

WH team responded instantly, is working on it as we speak and will get back to us ASAP. But they unfortunately are not optimistic, so we should explore other options in parallel.

Is there any possibility of arranging for private/commercial cargo plane transport? Chartered, even?

From: Chao, Henry (CMS/OIS) [mailto: [REDACTED]]
Sent: Saturday, September 28, 2013 6:36 PM
To: 'laura.fasching [REDACTED]'
Cc: Park, Todd
Subject: Re: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Just talked to Todd and he is going to talk to the rest of WH that can make this happen so just reply with the confirmed service to Homestead.

Todd--let us know ASAP so laura will send via ground if you can't arrange for transport to someplace the Air Force can land near Culpeper VA.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

[REDACTED] (Pri)
[REDACTED] (Alt)
[REDACTED] (BB)

From: Fasching, Laura [mailto: [REDACTED]]
Sent: Saturday, September 28, 2013 06:09 PM
To: Chao, Henry (CMS/OIS)
Cc: Fasching, Laura < [REDACTED] >
Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Henry,

We are working on firming up the white glove shippers but once that is done we would be good to go.

If we get the shippers scheduled and the equipment gets here tomorrow my engineers said they have the resources to build it out and just like we said before up by cob Monday.

I will let you know about the shippers within an hour.

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Fasching, Laura
Sent: Saturday, September 28, 2013 5:27 PM
To: Chao, Henry (CMS/OIS)

Cc: Fasching, Laura

Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Henry,

If you can make it happen wow

The equipment would be

Below is the possible weight, quantity, and size of the pending shipment.

Quantity 6 200.00 lb pallets Dimensions 39x25x33

On our side we have to get the equipment from the data center to Homestead AFB so I have the team looking at white glove courier services now. We would use the same kind of service to pick up the gear at Andrews Air Force base and have them transport it to Culpeper.

While they look for the white glove courier, I will make sure engineering will be able to add this space to their work load to have it over to you on Monday with the rest of the compute.

I am on calls with folks now to firm up our ability to pull off the logistics on our side, I will update you shortly.

Laura

Laura Fasching

Director of Public Sector Strategic Accounts | Verizon Terremark

Tel: [REDACTED]

222 W Las Colinas Blvd, Irving, Texas, 75039

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]

Sent: Saturday, September 28, 2013 4:56 PM

To: Fasching, Laura

Subject: RE: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Importance: High

Todd Park is willing to ask if we can define the need so that means to me if we can get the AF involved we would target tomorrow morning to get the equipment installed at Culpeper before 10/1.

Let me know

Henry Chao

Deputy CIO & Deputy Director,

Office of Information Services

Centers for Medicare & Medicaid Services

[REDACTED]

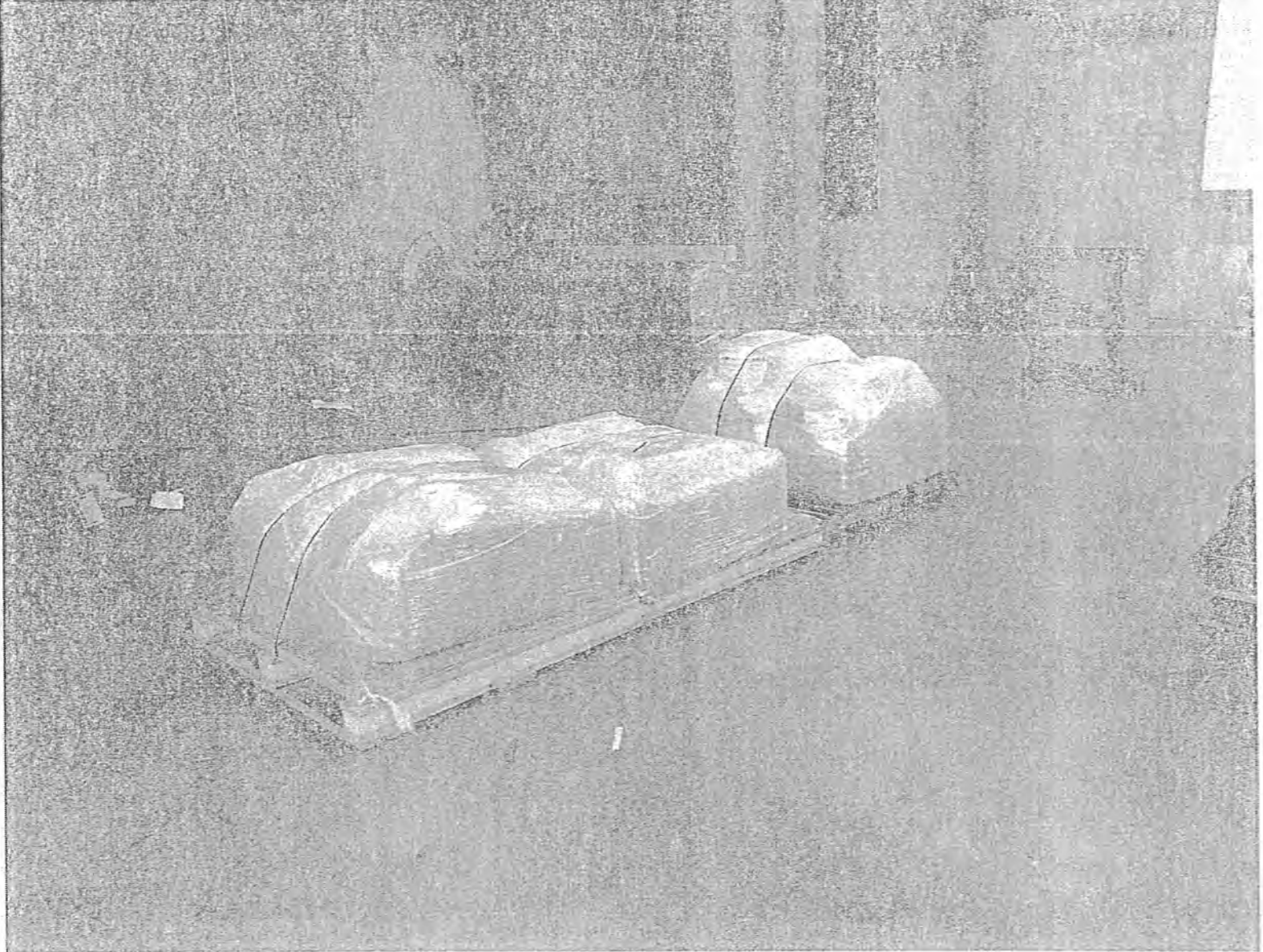
From: Chao, Henry (CMS/OIS)

Sent: Saturday, September 28, 2013 4:54 PM

To: Fasching, Laura ([REDACTED])

Subject: How serious are you about using Homestead AFB to get the equipment to Culpeper?

Importance: High





From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Friday, August 23, 2013 6:35 PM
To: Park, Todd; Snyder, Michelle (CMS/OA)
Subject: RE: Response to Todd's Cybersecurity bullet requests.

Michelle beat me to it.

From: Park, Todd [mailto:[REDACTED]]
Sent: Friday, August 23, 2013 6:34 PM
To: Snyder, Michelle (CMS/OA)
Cc: Trenkle, Tony (CMS/OIS)
Subject: RE: Response to Todd's Cybersecurity bullet requests.

I think these are great thank you. Will send to Marilyn/Jeanne, and cc: the two of you + Frank Baitman, as Tony suggests. Thanks again!

From: Snyder, Michelle (CMS/OA) [mailto:[REDACTED]]
Sent: Friday, August 23, 2013 6:21 PM
To: Park, Todd
Subject: Fw: Response to Todd's Cybersecurity bullet requests.
Importance: High

Here they are

Sent from my BlackBerry Wireless Device

From: Trenkle, Tony (CMS/OIS)
Sent: Friday, August 23, 2013 04:52 PM
To: Snyder, Michelle (CMS/OA)
Cc: Chao, Henry (CMS/OIS); King, Terris (CMS/OIS); Trenkle, Tony (CMS/OIS)
Subject: Response to Todd's Cybersecurity bullet requests.

Michelle,

Below are the bullets that I suggest that we send to Todd. We kept them focused on CMS and fairly generic. I can forward them to Todd or you can. We can also add to them if you want any statistics etc. Also, we should probably copy Frank on the response in case he wants to add anything from the HHS perspective.

- The Centers for Medicare and Medicaid Services (CMS) has maintained a strong history of preventing major breaches involving the loss of personally identifiable information from cyber -attacks. CMS has in place established risk management, security controls assessment, and security authorization processes for all CMS systems. These controls meet or exceed existing Federal standards.
- CMS has been an innovator leader in the information security community through the use of state of the art continuous monitoring tools that remotely scan the IT assets of CMS systems to ensure baseline configurations are up to date and compliant and that deviations are quickly identified and mitigated. Additionally these technologies have the capability to detect unknown or rogue hosts which

From: Park, Todd
Sent: Friday, August 23, 2013 6:45 PM
To: marilyn.tavener [REDACTED] Lambrew, Jeanne
Cc: michelle.snyder [REDACTED] Trenkle, Tony (CMS/OIS); frank.baitman [REDACTED]
Subject: Cybersecurity bullet points

Hi Jeanne and Marilyn, here are bullet points from Team CMS about how the Marketplace will be protected from cyber - attacks. Folks can add statistics and other additional info if desired. Also looping Frank Baitman from HHS.

- The Centers for Medicare and Medicaid Services (CMS) has maintained a strong history of preventing major breaches involving the loss of personally identifiable information from cyber -attacks. CMS has in place established risk management, security control s assessment, and security authorization processes for all CMS systems. These controls meet or exceed existing Federal standards.
- CMS has been an innovator leader in the information security community through the use of state of the art continuous monitoring tools that remotely scan the IT assets of CMS systems to ensure baseline configurations are up to date and compliant and that deviations are quickly identified and mitigated. Additionally these technologies have the capability to detect unknown or ro gue hosts which are quickly identified and blocked. Penetration testing is also performed on all CMS systems to identify vulnerabilities and reduce or eliminate potential risks from external threats.
- The IT systems that are being created for the Marketpla ce will meet or exceed existing Federal security standards and will utilize state of the art monitoring and surveillance tools. CMS is also working closely with HHS and other public and private sector security experts to get additional technical support f or the Marketplace program.

are quickly identified and blocked. Penetration testing is also performed on all CMS systems to identify vulnerabilities and reduce or eliminate potential risks from external threats.

- The IT systems that are being created for the Marketplace will meet or exceed existing Federal security standards and will utilize state of the art monitoring and surveillance tools. CMS is also working closely with HHS and other public and private sector security experts to get additional technical support for the Marketplace program.

From: Park, Todd [mailto:]
Sent: Friday, August 23, 2013 11:14 AM
To: Snyder, Michelle (CMS/OA); Trenkle, Tony (CMS/OIS)
Cc: Tavenner, Marilyn (CMS/OA)
Subject: Cybersecurity bullet points needed
Importance: High

Hi Michelle and Tony, Marilyn/WH folks would love to get three basic bullet points describing how we will protect the Marketplace from cyberattack. Many apologies, but if we could get these by COB today, that would be fantastic is that possible?

Below are three strawcase bullet points folks have drafted feel free to edit/change in any way you see fit. See notes following each bullet as well.

- The Center for Medicare and Medicaid Services (CMS) and the Internal Revenue Service (IRS) have been relentlessly attacked, given the amount of funding that they manage, yet there has never been a major breach and loss of personally identifiable information or loss of taxpayer dollars. NOTE: want to make sure this is stated/framed accurately
- The use of electronic applications does not necessarily make information less secure. For example, in 2012, 119 million taxpayers filed electronically, with less than half a million fraction being affected by identify theft since 2008. NOTE: you may want to replace this bullet entirely with another bullet that describes CMS's cybersecurity approach and capabilities. If you want to add more than one bullet on that, that's also totally cool.
- The information technology systems that are being created for the Marketplace meet or exceed existing government standards. In addition, HHS is working with States, IRS, DOJ and the FTC on a comprehensive plan to identify, prevent, detect, and prosecute identify theft and fraud.

Thanks so very, very much for your help,

Todd

From: Park, Todd
Sent: Wednesday, August 28, 2013 9:45 AM
To: Trenkle, Tony (CMS/OIS)
Cc: michelle.snyder [REDACTED] Mielke, Dawn M.; Graubard, Vivian
Subject: Cyber next steps

Hi Tony, just spoke with Michelle, and she thinks our game plan makes sense, with additions:

1. We should convene a work session in the next week with you, Teresa, Frank Baitman, his CISO, and probably a DHS person and DOJ person (she was thinking someone who has experience going after cyberattackers), plus any other folks you want to have there to discuss how to protect the Marketplace from cyberattack. This would include a discussion of our defenses, the threats, and our responses to the threats. I would absolutely love to be part of as much of this meeting as I can, but also don't want to be a scheduling bottleneck, and it should really happen sooner rather than later - looping Dawn and Viv to help with my schedule. You should go ahead and schedule the meeting, and I will try to be there for as much of it as I possibly can!
2. You/Teresa can then prepare a memo (could be for Michelle, for Marilyn, for others - we'll figure that out) that basically outlines the protection strategy, including threat assessment and response strategy. This will be a memo that we pass on to WH leadership as well, fyi - for internal use only.
3. I will also reach out to Alex Karp today to let him know that we would love to speak with him about cyber and the Marketplace - we should do a confidential, cone of silence consult with him after we've had our meeting as per item 1, not before; I'll set this up at the appropriate moment.

Does this sound cool to you?

Thanks!
Todd

From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Wednesday, August 28, 2013 9:52 AM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO); Fryer, Teresa M. (CMS/OIS)
Subject: Re: Cyber next steps

Todd

Yes, this is consistent with what we discussed yesterday. Looping in Frank and Teresa.

Michelle

I assume that we should have Henry there as well.

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, August 28, 2013 09:44 AM
To: Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M. <[REDACTED]>; Graubard, Vivian <[REDACTED]>
Subject: Cyber next steps

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Does this sound cool to you?

Thanks!

Todd

From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Wednesday, August 28, 2013 5:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO)
Subject: RE: Cyber next steps

Todd,

We are looking at setting up a call/meeting for next Wednesday morning at 10. I just spoke with Frank and that works for him. Teresa is already working with Kevin on pulling information together. I'll ask my scheduler to work with Dawn and Viv.

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, August 28, 2013 9:45 AM
To: Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian
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Does this sound cool to you?

Thanks!
Todd

From: Park, Todd
Sent: Wednesday, August 28, 2013 6:45 PM
To: Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO); Khalid, Aryana C. (CMS/OA)
Subject: RE: Cyber next steps

Tony, great, thank you, looping Aryana as well.

Might it be at all humanly possible to set up the meeting/call to happen between 1 and 4 pm on Wednesday? If that is not possible, I can try to figure something out, but just thought I'd check ☺

Aryana and I were also just in a meeting where we got some additional insight that is helpful:

- There is a cyber and ACA subcommittee hearing happening on September 11, so it probably makes sense to target putting together a memo by end of next week (and talking with Alex Karp by end of next week to help inform the memo will try to set up time with him for Thursday the 5th)
- It sounds like folks would like the memo to cover (1) our preparation for and defenses against cyberattack, (2) what would our response/action be if an attack/crisis happened, and (3) how would we prosecute attackers. The roster for the meeting Michelle recommended (to include DHS and also DOJ to handle the prosecute part) sounds spot on.
- Potentially for incorporation in the memo: external validators who could speak to the quality and strength of CMS cyberdefenses, should that become useful. Alex Karp could be one, but might you have others as well?

The memo is again for internal eyes only, but it sounds like people will draw from it in appropriate ways for external communications purposes as well.

Thanks!
Todd

From: Trenkle, Tony (CMS/OIS) [mailto:]
Sent: Wednesday, August 28, 2013 5:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO)
Subject: RE: Cyber next steps

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Does this sound cool to you?

Thanks!

Todd

From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Wednesday, August 28, 2013 7:01 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO); Khalid, Aryana C. (CMS/OA)
Subject: Re: Cyber next steps

Frank

Your call. I can move things around but I thought you were tied up

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, August 28, 2013 06:44 PM
To: Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M. <[REDACTED]>; Graubard, Vivian <[REDACTED]>; Baitman, Frank (OS/ASA/OCIO); Khalid, Aryana C. (CMS/OA)
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Thanks!
Todd

From: Trenkle, Tony (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, August 28, 2013 5:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCIO)
Subject: RE: Cyber next steps

Todd,

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From: Park, Todd [mailto:]
Sent: Wednesday, August 28, 2013 9:45 AM
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Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian
Subject: Cyber next steps

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Does this sound cool to you?

Thanks!
Todd

From: Baitman, Frank (OS/ASA/OCIO) <[REDACTED]>
Sent: Wednesday, August 28, 2013 7:24 PM
To: Park, Todd; Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Khalid, Aryana C. (CMS/OA); Charest, Kevin (OS/ASA/OCIO/OIS)
Subject: Re: Cyber next steps

+ Adding Kevin

Todd et al,

Unfortunately the Secretary's Leadership Council is next Wed afternoon and believe we'll have some IT items on the agenda, so I need to be there.

I believe we can address our defenses in a balanced manner: it should come as no surprise that we experience attacks and have defenses. But, for public facing material, we need to be careful to avoid too many details, and thereby avoid providing an instruction manual or worse, a challenge to malcontents to engage.

- Frank

From: <Park>, Todd <[REDACTED]>
Date: Wednesday, August 28, 2013 6:44 PM
To: "Trenkle, Tony (CMS/OIS)" <[REDACTED]>
Cc: "Snyder, Michelle (CMS/OA)" <[REDACTED]>, "Mielke, Dawn M." <[REDACTED]>, "Graubard, Vivian" <[REDACTED]>, Frank Baitman <[REDACTED]>, "Khalid, Aryana C. (CMS/OA)" <[REDACTED]>
Subject: RE: Cyber next steps

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Sent: Wednesday, August 28, 2013 5:44 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA); Mielke, Dawn M.; Graubard, Vivian; Baitman, Frank (OS/ASA/OCI O)
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+ Adding Kevin

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Tony, great, thank you, looping Aryana as well.

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Does this sound cool to you?

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Sent: Wednesday, August 28, 2013 9:40 PM
To: 'tony.trenkle [REDACTED]'
Cc: 'frank.baitman [REDACTED]'; 'Michelle.Snyder [REDACTED]'; Mielke, Dawn M.; Graubard, Vivian; 'Aryana.Khalid [REDACTED]'; 'Kevin.Charest [REDACTED]'
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Terrific, Tony, thanks, looking forward to it!

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Thanks!

Todd

From: Siskel, Edward
Sent: Thursday, August 29, 2013 11:13 AM
To: Dotzel, Peggy (HHS/OGC) [REDACTED]; Dori.Salcido [REDACTED]
Michael.Hash [REDACTED] Igreisman [REDACTED] Axelrod, Matthew (ODAG)
Cc: Jennings, Christopher; Lambrew, Jeanne; McGuinness, Tara; Leinwand, Jessica; Suvor, Daniel; Park, Todd
Subject: Follow up items

HHS *FTC* *MHS* *DOJ*

Thanks again for participating in yesterday's meeting and for all the work you have been doing to help protect consumers during the roll-out of the Marketplaces. Below is a list of do-outs from the meeting based on my notes. Please let me know if I am missing anything or if you have any questions. We will reconvene the group next week and ideally will have made substantial progress on each of these items by then. Also, I only have email addresses for a few of the participants in yesterday's meeting, so please forward this on to the other representatives from your agencies.

- HHS, HHS OIG and FTC will finalize procedures for referral of consumer fraud complaints through the call center, HHS OIG line, and online (training materials for operators; protocol for live transfers when caller elects; links to FTC website from healthcar e.gov and the HHS OIG website).
- HHS and FTC will develop (1) training materials for state-run exchanges to use in their call centers; and (2) a link to be provided to the state-run exchanges to use on their websites.
- FTC will develop an easy "how to" document that explains how to register a complaint (including use of drop-down menu).
- FTC/CMS will follow up with Vicki to incorporate the public education materials that HHS OIG has started to create to develop educational material to consumers who register a complaint.
- FTC will add to DOJ's "track record" document or create a parallel version.
- HHS will continue to refine fact sheets and public education materials and circulate to the group.
- All agencies will explore outside validators who can speak to the relevant issues (public education/outreach, intake process, value of Sentinel, prosecution, etc.).

Thanks, Ed

From: Mary.Horney <[REDACTED]> on behalf of Trenkle, Tony (CMS/OIS)
<[REDACTED]>
To: Park, Todd <[REDACTED]>
>; Fryer, Teresa M. (CMS/OIS)
>; Schankweiler, Thomas W. (CMS/OIS)
>; Baitman, Frank (OS/ASA/OCIO)
>; Charest, Kevin (OS/ASA/OCIO/OIS)
Cc: Mellor, Michael (CMS/OIS)
>; Callaghan, Liz M. (OS/ASA/OCIO)
>; Byczkowski, Roxanne (CMS/OIS)
>; Mielke, Dawn M.
>;
Velasco, Linda J. (CMS/OIS) <[REDACTED]>
Bcc:
Subject: Marketplace Security - WebEx: [REDACTED] (internal); [REDACTED] (external); Mtg. No. [REDACTED]
Date: Fri Aug 30 2013 14:48:43 EDT
Attachments:

The above-subject meeting was requested by Tony Trenkle to occur on this day at this time.
If you are unable to attend this meeting, please call the OIS Front Office at [REDACTED].

Meeting Number: [REDACTED]
Meeting Password: This meeting does not require a password.

Audio conference information

1. Please call the following number:
WebEx: [REDACTED]
2. Follow the instructions you hear on the phone.
Your WebEx Meeting Number: [REDACTED]

To join from the Baltimore, Chicago, or Kansas City offices

1. Dial ext. [REDACTED]
2. Enter the Meeting Number: [REDACTED]

To start the online meeting

1. Go to [REDACTED]
2. If you are not logged in, log in to your account.

From: Park, Todd
Sent: Monday, September 02, 2013 12:02 PM
To: Jennings, Christopher
Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]'; 'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'; Graubard, Vivian
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-- The Centers for Medicare and Medicaid Services (CMS) has maintained a strong history of preventing major breaches involving the loss of personally identifiable information from cyber -attacks. CMS has in place established risk management, security controls assessment, and security authorization processes for all CMS systems. These controls meet or exceed existing Federal standards.

-- CMS has been an innovator leader in the information security community through the use of state of the art continuous monitoring tools that remotely scan the IT assets of CMS systems to ensure baseline configurations are up to date and compliant and that deviations are quickly identified and mitigated. Additionally these technologies have the capability to detect unknown or rogue hosts which are quickly identified and blocked. Penetration testing is also performed on all CMS systems to identify vulnerabilities and reduce or eliminate potential risks from external threats.

-- The IT systems that are being created for the Marketplace will meet or exceed existing Federal security standards and will utilize state of the art monitoring and surveillance tools. CMS is also working closely with HHS and other public and private sector security experts to get additional technical support for the Marketplace program.

-- Tony Trenkle (CMS CIO) is convening a session next Wednesday, Sept 4, with CMS, HHS, DHS, DOJ, and me to review (1) our preparation for and defenses against cyberattack, (2) what our response/action would be in the event of an attack/crisis, and (3) how we would prosecute attackers. CMS will then produce a memo summarizing the above by the end of the week.

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Chris, again, please let us know if you have any questions!

All the best,
Todd

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To: 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'
Cc: 'Michelle.Snyder [REDACTED]'; Graubard, Vivian; Mielke, Dawn M.
Subject: A couple of follow-ups

Hi Tony and Frank! A couple of follow -ups to my email to Chris below:

1. Just wanted to make sure that we're going to have DHS and DOJ folks on the 10 am call on Wed, as per our original plan?
2. It looks like the call with Alex Karp's top cyber folks will be 4 pm on Wednesday -- Tony, can you join this call? Feel free to have others join as well. Frank, I think you may be in a mtg, but if you can join as well, that would be terrific... The agenda would be to (in confidence) discuss our cyber positioning and plans and get their thoughts. Dawn/Viv, can you make sure Tony/Frank are invited? Thanks!

Cheers,
Todd

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To: Park, Todd
Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]'; 'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'; Graubard, Vivian
Subject: RE: Cybersecurity points

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Chris

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Sent: Monday, September 02, 2013 12:02 PM
To: Jennings, Christopher
Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]'; 'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'; Graubard, Vivian
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Chris, again, please let us know if you have any questions!

All the best,
Todd

From: Baitman, Frank (OS/ASA/OCIO) <[REDACTED]>
Sent: Monday, September 02, 2013 1:21 PM
To: Park, Todd; Trenkle, Tony (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA); Khalid, Aryana C. (CMS/OA); Charest, Kevin (OS/ASA/OCIO/OIS)
Subject: Re: Cybersecurity points
Importance: High

Looping Kevin into this conversation as well.

I think we can come up with something.

- Frank

On 9/2/13 1:14 PM, "Park, Todd" <[REDACTED]> wrote:

>Hi Tony, many apologies for interrupting your Labor Day, but can you
>help Chris with his follow-up question below (reference to "current
>federal standards and how they exceed private sector as well as track
>record of protection from attacks"). I think the federal standards
>reference may refer to federal privacy/security standards? And with
>respect to track record of protection from attacks, I think a couple of
>sentences of additional description on this front would be sufficient
>(and again, this is for internal purposes, not external communication).
>
>[REDACTED] so getting Chris points by
>tonight would be amazingly helpful, if at all possible -- might this be
>possible? Thanks so very much....

>Todd

>----- Original Message -----

>From: Jennings, Christopher
>Sent: Monday, September 02, 2013 12:28 PM
>To: Park, Todd
>Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]
><[REDACTED]>; 'Michelle.Snyder [REDACTED]
><Michelle.Snyder [REDACTED]>; 'tony.trenkle [REDACTED]
><tony.trenkle [REDACTED]>; 'frank.baitman [REDACTED]
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>Subject: Cybersecurity points

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To: Park, Todd; Siskel, Edward
Cc: Lambrew, Jeanne; Jones, Isabel; 'aryana.khalid [REDACTED]';
'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]';
Graubard, Vivian
Subject: Re: Cybersecurity points

Thank you Todd and all on this email. Very helpful and greatly appreciated. [REDACTED]
[REDACTED] Thanks to all for this background and, more importantly, your great work to protect us from cyber attacks/security threats.

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Subject: Re: Cybersecurity points

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Cheers,
Todd

----- Original Message -----

From: Jennings, Christopher

Sent: Monday, September 02, 2013 12:28 PM

To: Park, Todd

Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED] <[REDACTED]>;

'Michelle.Snyder [REDACTED] <[REDACTED]>; 'tony.trenkle [REDACTED]

<[REDACTED]>; 'frank.baitman [REDACTED] <[REDACTED]>; Graubard, Vivian

Subject: RE: Cybersecurity points

Ok, thanks Todd. Quite helpful and will serve as placeholder for [REDACTED]
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Sent: Monday, September 02, 2013 12:02 PM

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Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]; 'Michelle.Snyder [REDACTED]

'tony.trenkle [REDACTED]; 'frank.baitman [REDACTED]; Graubard, Vivian

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Chris, again, please let us know if you have any questions!

All the best,
Todd

From: Mary.Horney [redacted] <[redacted]> on behalf of Trenkle, Tony (CMS/OIS)

To: Park, Todd <[redacted]>

[redacted] >; Fryer, Teresa M. (CMS/OIS)

[redacted] >; Schankweiler, Thomas W. (CMS/OIS)

[redacted] >; Baitman, Frank (OS/ASA/OCIO)

[redacted] >; Charest, Kevin (OS/ASA/OCIO/OIS)

Cc: Mellor, Michael (CMS/OIS)

[redacted] >; Callaghan, Liz M. (OS/ASA/OCIO)

[redacted] >; Byczkowski, Roxanne (CMS/OIS)

[redacted] >; Mielke, Dawn M.

[redacted] >;

Velasco, Linda J. (CMS/OIS) <[redacted]>

Bcc:

Subject: Marketplace Security - NEW DAY & TIME - WebEx: [redacted] (internal); [redacted] (external); Mtg. No. [redacted]

Date: Tue Sep 03 2013 08:40:36 EDT

Attachments:

The above-subject meeting was requested by Tony Trenkle to occur on this day at this time. If you are unable to attend this meeting, please call the OIS Front Office at [redacted].

Meeting Number: [redacted]
Meeting Password: This meeting does not require a password.

Audio conference information

1. Please call the following number:
WebEx: [redacted]
2. Follow the instructions you hear on the phone.
Your WebEx Meeting Number: [redacted]

To join from the Baltimore, Chicago, or Kansas City offices

1. Dial ext. [redacted]
2. Enter the Meeting Number: [redacted]

To start the online meeting

1. Go to [redacted]
2. If you are not logged in, log in to your account.

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Sent: Monday, September 02, 2013 02:43 PM

To: Park, Todd

Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED] <[REDACTED]>; 'Michelle.Snyder [REDACTED] <[REDACTED]>; 'tony.trenkle [REDACTED] <[REDACTED]>; 'frank.baitman [REDACTED] <[REDACTED]>; Graubard, Vivian

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Chris, again, please let us know if you have any questions!

All the best,
Todd

From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Tuesday, September 03, 2013 7:22 PM
To: Park, Todd; Baitman, Frank (OS/ASA/OCIO); Snyder, Michelle (CMS/OA)
Subject: Re: Cybersecurity points

I don't see any problem with him joining if it helps with context etc.

----- Original Message -----

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, September 03, 2013 07:06 PM
To: Trenkle, Tony (CMS/OIS); Baitman, Frank (OS/ASA/OCIO); Snyder, Michelle (CMS/OA)
Subject: Fw: Cybersecurity points

Tony, Frank, Michelle, thoughts on Ed joining our 10 am call tomorrow, and then talking with him afterwards briefly? One point to discuss with him is Frank's very good point that we need to walk a fine line publicly -- showing we take the risks seriously but also not baiting hackers into attacking.

Also: it was part of the outline for tomorrow's call, but just wanted to follow up on if we can get some external validators to be references with respect to CMS's general cyberdefenses and approach to cybersecurity -- again, in the context of the walking the fine line above....

Thanks so much,
Todd

----- Original Message -----

From: Siskel, Edward
Sent: Tuesday, September 03, 2013 05:14 PM
To: Park, Todd
Subject: FW: Cybersecurity points

-----Original Message-----

From: Jennings, Christopher
Sent: Tuesday, September 03, 2013 4:33 PM
To: Siskel, Edward; McGuinness, Tara; Lambrew, Jeanne; Park, Todd
Cc: Jones, Isabel; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Graubard, Vivian
Subject: Re: Cybersecurity points

Todd and gang: [REDACTED]

[REDACTED]

Thanks all.

Chris

----- Original Message -----

From: Jennings, Christopher

Sent: Tuesday, September 03, 2013 07:12 AM

To: Park, Todd; Siskel, Edward

Cc: Lambrew, Jeanne; Jones, Isabel; 'aryana.khalid' <[REDACTED]>;

'Michelle.Snyder' <[REDACTED]>; 'tony.trenkle' <[REDACTED]>;

<[REDACTED]>; 'frank.baitman' <[REDACTED]>; Graubard, Vivian

Subject: Re: Cybersecurity points

Thank you Todd and all on this email. Very helpful and greatly appreciated. [REDACTED]

[REDACTED] Thanks to all for this background and, more importantly, your great work to protect us from cyber attacks/security threats.

Chris

----- Original Message -----

From: Park, Todd

Sent: Tuesday, September 03, 2013 01:38 AM

To: Jennings, Christopher

Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid' <[REDACTED]>;

'Michelle.Snyder' <[REDACTED]>; 'tony.trenkle' <[REDACTED]>;

<[REDACTED]>; 'frank.baitman' <[REDACTED]>; Graubard, Vivian

Subject: Re: Cybersecurity points

Hi Chris, here are an expanded/updated set of bullet points from Frank and Tony:

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From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Tuesday, September 03, 2013 7:24 PM
To: Trenkle, Tony (CMS/OIS); Park, Todd; Baitman, Frank (OS/ASA/OCIO)
Subject: Re: Cybersecurity points

Agree with tony

M

Sent from my BlackBerry Wireless Device

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Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]'; 'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'; Graubard, Vivian

Subject: RE: Cybersecurity points

Ok, thanks Todd. Quite helpful and will serve as placeholder for [REDACTED]. We need to have all of this locked down for September 11th hearing; we also have to have strong message with Justice, FTC, HHS and others for our enforcement event the week of the 16th. I know we had reference somewhere to current federal standards and how they exceed private sector as well as track record of protection from attacks. Can you or someone provide that reference for me to bolster confidence building tomorrow? Thanks much for all. And safe and fun travels my friend.

Chris

-----Original Message-----

From: Park, Todd

Sent: Monday, September 02, 2013 12:02 PM

To: Jennings, Christopher

Cc: Lambrew, Jeanne; Jones, Isabel; 'Aryana.Khalid [REDACTED]'; 'Michelle.Snyder [REDACTED]'; 'tony.trenkle [REDACTED]'; 'frank.baitman [REDACTED]'; Graubard, Vivian

Subject: Cybersecurity points

Hi Chris, here are cybersecurity background points for you [REDACTED]. The first three are the points CMS put together previously which I'm sure you've already seen; they are followed by a couple of points about

next steps currently underway. Please let us know if you have any questions. I'll be on a long flight for much of Tuesday -- am looping Tony (CMS CIO), Frank Baitman (HHS CIO), Michelle, and Aryana, who can answer any questions you have that might arise.

-- The Centers for Medicare and Medicaid Services (CMS) has maintained a strong history of preventing major breaches involving the loss of personally identifiable information from cyber -attacks. CMS has in place established risk management, security controls assessment, and security authorization processes for all CMS systems. These controls meet or exceed existing Federal standards.

-- CMS has been an innovator leader in the information security community through the use of state of the art continuous monitoring tools that remotely scan the IT assets of CMS systems to ensure baseline configurations are up to date and compliant and that deviations are quickly identified and mitigated. Additionally these technologies have the capability to detect unknown or rogue hosts which are quickly identified and blocked. Penetration testing is also performed on all CMS systems to identify vulnerabilities and reduce or eliminate potential risks from external threats.

-- The IT systems that are being created for the Marketplace will meet or exceed existing Federal security standards and will utilize state of the art monitoring and surveillance tools. CMS is also working closely with HHS and other public and private sector security experts to get additional technical support for the Marketplace program.

-- Tony Trenkle (CMS CIO) is convening a session next Wednesday, Sept 4, with CMS, HHS, DHS, DOJ, and me to review (1) our preparation for and defenses against cyberattack, (2) what our response/action would be in the event of an attack/crisis, and (3) how we would prosecute attackers. CMS will then produce a memo summarizing the above by the end of the week.

-- As an fyi, we have also reached out to Alex Karp and team. Alex put us in touch with his top cyber experts -- we are slated to speak with them on Wednesday as well.

Chris, again, please let us know if you have any questions!

All the best,
Todd

From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Wednesday, September 04, 2013 8:12 AM
To: Siskel, Edward; Horney, Mary P. (CMS/OIS)
Cc: Graubard, Vivian; Mielke, Dawn M.; Park, Todd
Subject: 10 call

Mary,

Please add Ed to the appointment.

Thanks.

-----Original Message-----

From: Park, Todd [mailto:[REDACTED]]
Sent: Tuesday, September 03, 2013 7:53 PM
To: Siskel, Edward
Cc: Trenkle, Tony (CMS/OIS); Baitman, Frank (OS/ASA/OCIO); Snyder, Michelle (CMS/OA); Graubard, Vivian; Mielke, Dawn M.
Subject: Re: Cybersecurity points

Ed, it would be great for you to join the 10 am call hosted by Tony Trenkle tomorrow, and for a subset of us to chat with you for a few minutes after the call. Tony, can you make sure Ed gets the invite/call -in number?

Ed, it may also make sense for you to join the 4 pm mtg -- let's discuss tomorrow, thanks!

Todd

From: Jennings, Christopher
Sent: Tuesday, September 17, 2013 10:56 PM
To: Park, Todd
Subject: Fw: Final Version of PR
Attachments: FINAL Marketplace Fraud Press Release WHCO edits clean.docx; FINAL Marketplace Fraud Press Release WHCO edits.docx

From: Jones, Isabel
Sent: Tuesday, September 17, 2013 09:00 PM
To: 'Salcido, Dori (HHS/ASPA)' <[REDACTED]>; Sye, Tait (OS/ASPA) <[REDACTED]>; Jennings, Christopher; Jackson, Veronica (HHS/ASPA) <[REDACTED]>
Subject: RE: Final Version of PR

Sorry, two tiny edits attached that WHCO just told me are must haves to keep FTC on board. I think we can go with this as final.

From: Salcido, Dori (HHS/ASPA) [mailto:[REDACTED]]
Sent: Tuesday, September 17, 2013 8:59 PM
To: Jones, Isabel; Sye, Tait (OS/ASPA); Jennings, Christopher; Jackson, Veronica (HHS/ASPA)
Subject: RE: Final Version of PR

Yes, minor tweak, but final is also attached.

Dori Salcido

[REDACTED] (o)
[REDACTED] (c)

From: Jones, Isabel [mailto:[REDACTED]]
Sent: Tuesday, September 17, 2013 8:52 PM
To: Salcido, Dori (HHS/ASPA); Sye, Tait (OS/ASPA); Jennings, Christopher; Jackson, Veronica (HHS/ASPA)
Subject: Final Version of PR

Hi – Attached are just last edits to incorporate changes we received from WHCO. These are very minor so we are hoping to consider these locked. Attached is tracked and clean copy. Can you let us know if we can consider this final and send us back the final version with any last minor edits fixed (any typos/formatting,etc)?

Thanks all,
Isabel

Obama Administration announces a coordinated effort to prevent and detect consumer fraud in the Health Insurance Marketplace

Today, Attorney General Eric Holder, Health and Human Services Secretary Kathleen Sebelius, and Federal Trade Commission Chairwoman Edith Ramirez met at the White House to kick off a comprehensive interagency initiative to prevent, protect against, and where necessary prosecute consumer fraud and privacy violations in the Health Insurance Marketplaces. Representing key state partners in this critically important effort to protect consumers were Maryland Attorney General Douglas Gansler and Kansas Insurance Commissioner Sandy Praeger. Senior White House officials also attended the meeting.

Meeting participants reaffirmed their ongoing commitment to protect consumers from threats in this area. Building on a successful infrastructure that already exists, the interagency officials highlighted the following new initiatives: 1) the dedication of the Marketplace Call Center as a resource and referral to FTC for consumer fraud concerns; 2) training for the Marketplace Call Center staff to effectively refer consumer threats and complaints; 3) connecting consumers to FTC's Complaint Assistant through Healthcare.gov; 4) development of a system of routing complaints through the FTC's Consumer Sentinel Network for analysis and referral as appropriate; ; 5) establishment of a rapid response mechanism for addressing privacy or cybersecurity threats and ; 6) release of new educational materials to empower consumers and assisters who help potential enrollees to avoid scams.

"Today we are sending a clear message that we will not tolerate anyone seeking to defraud consumers in the Health Insurance Marketplace," said Health and Human Services Secretary Sebelius. "We have strong security safeguards in the Marketplace to protect people's personal information against fraud and we will work with our partners to aggressively prosecute bad actors, just as we have been doing in Medicare, Medicaid and the Children's Health Insurance Program."

The experienced and dedicated professionals at HHS, DOJ and FTC, together with their state and local partners, are ready to anticipate and respond to the law enforcement challenges that may arise with the launch of the Marketplace. They will be using tried and tested methods for combatting fraud associated with other government programs, so that consumers can confidently and securely shop for affordable health insurance beginning on October 1.

"I am proud of the proactive approach that the Justice Department is taking with our colleagues at HHS and FTC, and with the state law enforcement community, to prevent and detect consumer fraud in the Health Insurance Marketplace," said Attorney General Eric Holder. "Going forward, we intend to share information, work cases, and hold wrongdoers accountable as we always do. We plan to use our tried-and-tested collaborative methods to ensure that we can identify trends and take swift action against those seeking to take advantage of the newly insured."

Consumers who report that their personal information may have been compromised will be given information about steps to take to prevent or respond to identity theft. If a consumer reports suspected fraud, his or her complaint will be entered into the FTC's Consumer Sentinel Network database, which is used by federal and state law enforcement agencies to track potential fraud activity. Federal law enforcement officials will be able to monitor complaint activity for trends within and across all 50 States.

"At the FTC, we know all too well how scammers invariably try to take advantage of developments in the marketplace and new government programs," said FTC Chairwoman Edith Ramirez. "We will be vigilant as always in cracking down on this type of opportunistic fraud."

Consumer fraud experts from across state and federal agencies will continue to meet on a regular basis to monitor potential fraud associated with the Marketplace and ensure the strength of preventive measures. Steps have already been initiated to prevent and respond to individuals attempting to take advantage of the public during health care implementation.

These measures include:

- **Reporting fraud mechanism:** A new feature of the Marketplace Call Center (1-800-318-2596, TTY 1-855-889-4325), will now enable individuals to report fraud simply by calling the 1800 number.
- **Training:** Call Center operators trained to take a fraud complaint, and refer them to FTC's Consumer Sentinel Network.
- **Creating new pathways:** Healthcare.gov offers easy access to connect consumers to FTC's Complaint Assistant through Health Care.Gov.
- **Establishing a routing system for complaints through a centralized database:** Routing complaints through the Sentinel Network will ensure Federal, state and local law enforcement have access to consumer complaints and can analyze and refer those complaints as appropriate.
- **Protecting personal data:** Building on last week's certification of the data hub and Health Insurance Marketplace as in compliance with the stringent security, privacy and data flow standards developed by the National Institute of Standards and Technology - the gold standard for information and independent security controls assessment - the interagency officials have also established a rapid response mechanism that will be employed in the unlikely event of a data security breach.
- **Empowering consumers with information:** Building on a proactive effort to inform consumers about potential fraud and privacy threats, the federal government is releasing new educational materials to empower consumers and assisters who are helping consumers navigate the Marketplaces. They include online tip sheets like: Protect Yourself from Fraud in the Health Insurance Marketplace [LINK <http://marketplace.cms.gov/getofficialresources/publications-and-articles/protect-yourself-from-fraud-in-health-insurance-marketplace.pdf>] and Tips for Assisters to Help Consumers Navigate the Marketplace [INSERT LINK]. The materials remind consumers that there is free assistance available to navigate the Marketplace and that they should be suspicious of persons who ask for a fee before providing assistance.

In addition, the FTC and DOJ are hosting events this week in anticipation of the launch of the Marketplace:

- Thursday, September 19th, the FTC, will host a roundtable in Washington, DC to discuss how to empower and protect consumers from scammers with the advent of the Health Insurance

Marketplace. The roundtable will bring together experts on the health care law, federal and state consumer protection officials, representatives of legal services and community -based organizations, and consumer advocates to discuss key features of the law, state approaches to implementation, and how to help consumers avoid potential scams.

- Friday, September 20th, DOJ will host a law enforcement meeting to convene state and local officials. This meeting is part of ongoing efforts urging state AGs to work with HHS and federal, state, and local law enforcement to mount a substantial outreach campaign to educate consumers about how to prevent scams and fraud and protect their personal information in the Marketplace.

These comprehensive preventive and detection efforts build on the extensive experience and federal, state and local intergovernmental infrastructure that has protected consumers from fraud.

- Since its creation in 1997, the HHS Senior Medicare Patrol has educated to more than 28 million Medicare beneficiaries and counseled more than 1.3 million individuals about specific concerns, one-on-one. Coupled with other outreach efforts, Medicare's toll -free customer service operations sent nearly 45,000 inquiries to law enforcement partners for fraud investigations in 2012 alone. These direct-from-consumer leads ultimately supported the Administration's work to prosecute criminals, returning \$6.7 billion to the Medicare Trust Fund in the last four years.
- In the last several years, the FTC's Bureau of Consumer Protection has put a stop to over 50 health fraud scams, government grant schemes, and mortgage relief services frauds, and has independently secured nearly \$6 million in monetary relief for consumers. The Bureau conducts investigations, sues companies and people that violate the law, and works to educate consumers and businesses about their rights and responsibilities. The Bureau coordinates its work in these areas with Federal, state and local partners.
- Over the last four years, DOJ has successfully prosecuted over four thousand defendants in identity theft and aggravated identity theft cases, and convicted over 200 defendants in advance fee fraud cases, over 500 defendants in consumer fraud cases, and over 100 defendants in telemarketing fraud cases.

For more information on CMS's efforts to protect consumers in the Marketplace, please visit: [Securing the Health Insurance Marketplace Fact Sheet \[INSERT LINK\]](#)

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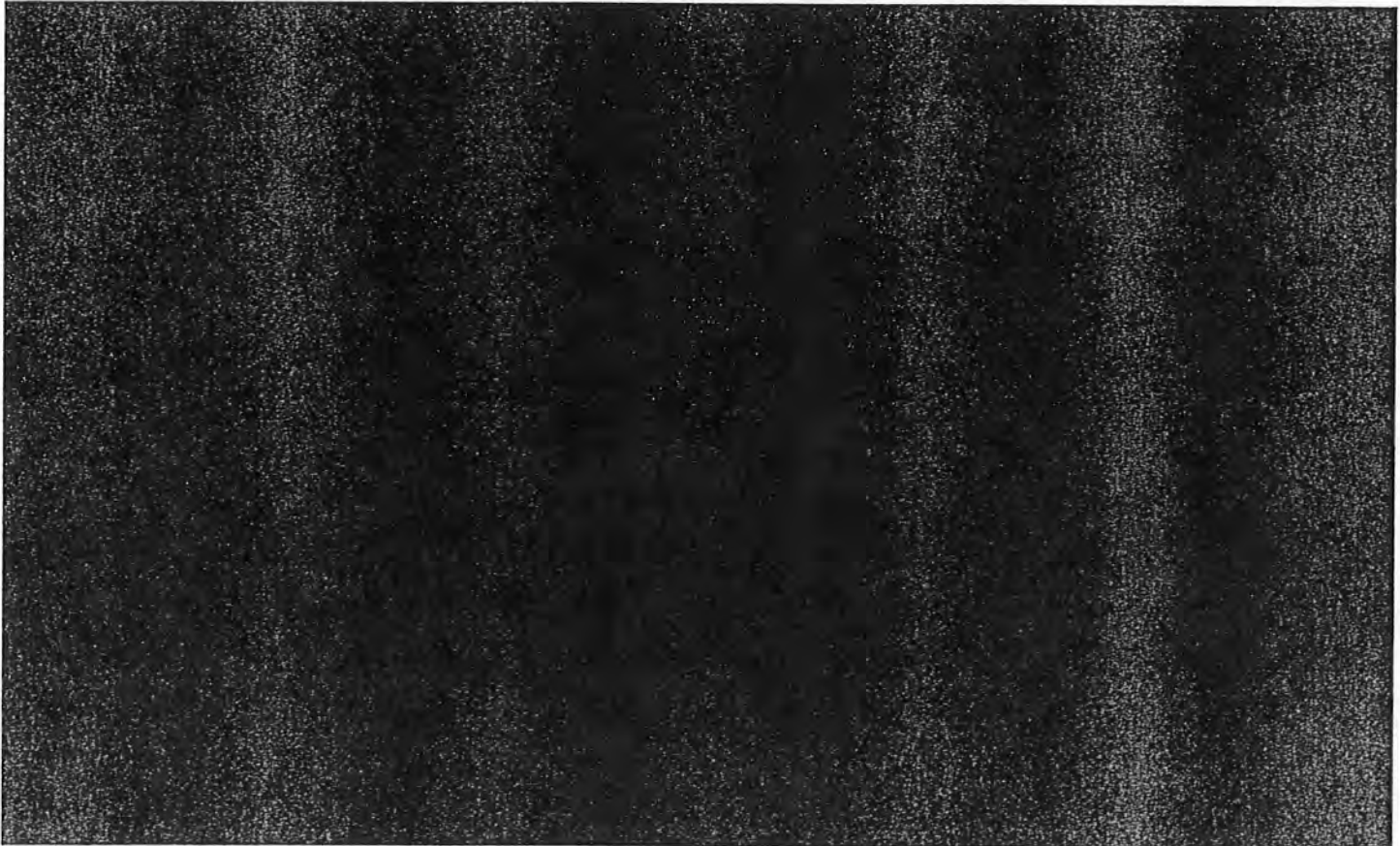
From: Park, Todd
Sent: Tuesday, September 17, 2013 4:43 PM
To: Santillo, Jessica
Cc: Jones, Isabel; Mielke, Dawn M.; Trenkle, Tony (CMS/OIS); [REDACTED] Cook, Brian T. (CMS/OC) ([REDACTED])
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Hi Jessica, I am signed up to help with the call! Looping Tony, Frank, and Brian. Two questions:

1. Is the call on background, or on the record?
2. Can Tony Trenkle and Frank Baitman join me on the call? They are the folks who know the details, and it would be super-helpful for them to be on.

Thanks!
Todd

From: Santillo, Jessica
Sent: Tuesday, September 17, 2013 2:10 PM
To: Park, Todd
Cc: Jones, Isabel; Mielke, Dawn M.
Subject: Preventing Fraud in Marketplaces - WH background call with media tomorrow?



From: Baitman, Frank (OS/ASA/OCIO) <[REDACTED]>
Sent: Wednesday, September 18, 2013 12:31 PM
To: Trenkle, Tony (CMS/OIS); Park, Todd
Subject: Re: Cyber bullet points for your review; plus a question

Just to add to Tony's earlier point: there will be only ONE ATO for the FFM. The many components together make a system that will be tested and validated end-to-end.
- Frank

From: <Trenkle>, "Tony (CMS/OIS)" <[REDACTED]>
Date: Wednesday, September 18, 2013 12:13 PM
To: "Todd Y Park" <[REDACTED]>, "Todd Y Park" <[REDACTED]>, Frank Baitman <[REDACTED]>
Subject: Re: Cyber bullet points for your review; plus a question

Todd

Yes, that is basically it.

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 10:56 AM
To: Trenkle, Tony (CMS/OIS); Baitman, Frank (OS/ASA/OCIO)
Subject: RE: Cyber bullet points for your review; plus a question

And Tony and Frank, sorry, one more background question: the press release today says: "Together with our interagency partners, CMS has developed a rapid response mechanism to respond to a potential data breach and mitigate the effects of attempts to jeopardize the integrity of the Hub and the databases it connects."

Is this the same thing as the Incident Response capability discussed in Marilyn's letter, but with souped up interagency coordination?

Or is it something different?

Just want to make sure I represent this properly, thanks !

From: Park, Todd
Sent: Wednesday, September 18, 2013 10:32 AM
To: 'Trenkle, Tony (CMS/OIS)'
Subject: RE: Cyber bullet points for your review; plus a question

And Tony, one more background question: is it the case that the security testing is done by an independent contractor managed by CMS info security staff, and that the review of results, assessment, and signoff happen via you, the CISO, and CMS info security staff? Thanks!

From: Park, Todd
Sent: Wednesday, September 18, 2013 10:15 AM
To: 'Trenkle, Tony (CMS/OIS)'; Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)

From: Park, Todd
Sent: Wednesday, September 18, 2013 12:43 PM
To: 'tony.trenkle [REDACTED]'
Subject: Re: Cyber bullet points for your review; plus a question

Thanks so much, Tony!

From: Trenkle, Tony (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 12:38 PM
To: Park, Todd
Subject: RE: Cyber bullet points for your review; plus a question

Todd,

Sorry, I missed this one. Yes, you are correct about the process.

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 10:32 AM
To: Trenkle, Tony (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

And Tony, one more background question: is it the case that the security testing is done by an independent contractor managed by CMS info security staff, and that the review of results, assessment, and signoff happen via you, the CISO, and CMS info security staff? Thanks!

From: Park, Todd
Sent: Wednesday, September 18, 2013 10:15 AM
To: 'Trenkle, Tony (CMS/OIS)'; Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira; Fryer, Teresa M. (CMS/OIS); Mellor, Michael (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

OK, great, Tony, thanks! Any other points you think I should have as background material?

From: Trenkle, Tony (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 8:30 AM
To: Park, Todd; Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira; Fryer, Teresa M. (CMS/OIS); Mellor, Michael (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

Todd,

The bullets you have written are consistent with the letter as well as the call and statement from Gartner. In terms of other ATOs, I would not characterize it that way because it sounds like we are doing a piecemeal approach. In reality

there will only be one ATO issued for the FFM, even though there are multiple components that are being tested. Here is how I would re-write the sentence:

– CMS is working to ensure that all security testing for the Marketplace systems are completed and the appropriate operating authorities are signed before October 1.

I'm putting it in that context because the privacy and security framework for the Marketplace also includes interconnection agreements with other Federal agencies and states, agreements with issuers, and security agreements/contract language for the Marketplace contractors.

Tony

From: Park, Todd [mailto:]
Sent: Wednesday, September 18, 2013 1:18 AM
To: Santillo, Jessica; Trenkle, Tony (CMS/OIS); Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira
Subject: Cyber bullet points for your review; plus a question
Importance: High

Hi Tony, Frank, and Jessica, please see draft cyber talking points below they are drawn from Marilyn's letter plus earlier talking points that Frank and Tony put together plus a statement that Gartner analyst Christian Barnes recently gave us about the statements in Marilyn's letter. Please let me know what you think, and made edits/additions as you see fit (have attached the bullet points in a Word document for easier track-changes editing if desired). Tony, please also note the question about additional ATOs highlighted in yellow below. Thanks!

-- We take extremely seriously our responsibility to protect personal information in the Affordable Care Act Marketplace. Collectively, the tools, methods, policies, and procedures HHS has developed provide a safe and sound security framework to safeguard consumer data, allowing eligible Americans to confidently and securely enroll in quality affordable health coverage starting on October 1. This framework is consistent with the framework that exists for all other HHS programs, such as Medicare, on which Americans rely every day.

– HHS's Centers for Medicare and Medicaid Services (CMS) has a strong track record of preventing breaches involving the loss of personally identifiable information from cyber-attacks. This is due in large part to the establishment of an information security program with consistent risk management, security controls assessment, and security authorization processes for all enterprise systems. The system and security controls established and implemented by CMS meet tough existing Federal standards.

– The Marketplace is designed to comply with the comprehensive information security standards developed by the National Institute for Standards and Technology (NIST) in support of the Federal Information Security Management Act (FISMA). NIST has emerged as the gold standard for information security standards and guidelines that all Federal agencies follow. Several layers of protection will be in place to help protect against potential damage from attackers and mitigate risks. For example, the Marketplace will employ a continuous monitoring model that will utilize sensors and active event monitoring to quickly identify and take action against irregular behavior and unauthorized system changes that could indicate potential attacks. Automated methods will ensure that system administrators have access to only the parts of the system that are necessary to perform their jobs. These protocols, combined with continuous monitoring, will alert system security personnel when any system administrator attempts to perform functions or access data for which they are not authorized or are inconsistent with their job functions.

-- Should security incidents occur, CMS would activate an Incident Response capability built on the model developed by NIST. The Incident Response function allows for the tracking, investigation, and reporting of incidents so that HHS may quickly identify security incidents and ensure that the relevant law enforcement authorities, such as the HHS Office of Inspector General Cyber Crimes Unit, are notified for purposes of possible criminal investigation.

-- CMS's information security staff have been working closely with Marketplace IT development teams to help ensure that all required security testing is completed. Before Marketplace systems are allowed to operate and begin serving consumers, they must comply with the rigorous standards we apply to all Federal operational systems, and CMS's Chief Information Officer must authorize the systems to begin operation issuing an Authority to Operate (ATO).

-- The Data Hub, a key routing tool that helps both the Federally Facilitated Marketplace and State -Based Marketplaces provide accurate and timely eligibility determinations (by verifying information in Federal and state databases), successfully completed its independent security testing and was authorized to operate on September 6. The completion of this testing confirms that the Hub comports with the tough standards discussed above and that CMS has implemented the appropriate procedures and safeguards necessary for the Hub to operate securely on October 1.

-- CMS is working to ensure that all security testing is completed and ATO's issued for other Marketplace components as well before October 1. [QUESTION FOR TONY have any additional ATOs been issued beyond the Hub ATO? Will there be just one additional ATO, or multiple? Is this sentence worded correctly?]

-- HHS has produced a strong enterprise information security program by implementing state -of-the-art controls and business processes based on statutory requirements, agency and organizational commitments, best practices, and the experience and knowledge of our subject matter team members.

-- As recently noted by Christian Barnes, a leader of the information security practice at Gartner Research, which advises thousands of private-sector and government clients on best practices associated with the use of information technology, this HHS/CMS information security program as described above represents "current best practices for the protection of sensitive and regulated data and systems."

-- Application of this information security program to the Marketplace provides strong, sound safeguards for consumer data, allowing eligible Americans to confidently and securely enroll in quality affordable health coverage.

From: Park, Todd

Sent: Tuesday, September 17, 2013 9:54 PM

To: Santillo, Jessica; 'tony.trenkle [REDACTED]

Cc: Jones, Isabel; Mielke, Dawn M.; 'frank.baitman [REDACTED]; 'Brian.Cook [REDACTED]; 'Michelle.Snyder [REDACTED]

Subject: Re: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Hi Tony/Frank, an update -- it looks like the background call tomorrow is with WH folks only, with detailed inquiries to be referred to agencies.

So: while I'd love for you to hold the time on your calendars (just in case), as of this moment, you don't have to get on the call :)

I've let Jessica know that you guys are the font of detailed knowledge on CMS/HHS cyber and that I can't talk to it at a general level only -- she thinks that will be OK on the call tomorrow, with detailed questions to be referred to agencies.

Just to triple check this, I will be sending around talking points tonight which (combined with Marilyn's Hub letter) basically represent what I'm prepared to say tomorrow. Would very much appreciate your vetting of these.

And in the event that, after reviewing my talking points, Jessica feels like we need more on the call, we may ask you to attend the call after all :)

So while you are off the hook for now, please do hold the call time, just in case!

Thanks so much, and please stay tuned for talking points to vet, coming later tonight,

Todd

From: Park, Todd
Sent: Tuesday, September 17, 2013 07:39 PM
To: Santillo, Jessica; 'tony.trenkle [REDACTED]' <[REDACTED]>
Cc: Jones, Isabel; Mielke, Dawn M.; 'frank.baitman [REDACTED]' <[REDACTED]>; 'Brian.Cook [REDACTED]' <[REDACTED]>; 'Michelle.Snyder [REDACTED]' <[REDACTED]>
Subject: Re: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

OK, will draft talking points and send around later tonight. And Tony/Frank, please confirm if you can join me on this background call -- again, only to participate in the cybersecurity portion :) Would really appreciate your help :)

From: Santillo, Jessica
Sent: Tuesday, September 17, 2013 07:37 PM
To: Park, Todd; 'tony.trenkle [REDACTED]' <[REDACTED]>
Cc: Jones, Isabel; Mielke, Dawn M.; 'frank.baitman [REDACTED]' <[REDACTED]>; 'Brian.Cook [REDACTED]' <[REDACTED]>; 'Michelle.Snyder [REDACTED]' <[REDACTED]>
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Thanks Todd if your team could draft the cyber talking points, that would be very helpful. Thanks so much.

We are still working on finalizing the paper but will share those with everyone as soon as they are ready.

From: Park, Todd
Sent: Tuesday, September 17, 2013 7:22 PM
To: Santillo, Jessica; 'tony.trenkle [REDACTED]'
Cc: Jones, Isabel; Mielke, Dawn M.; 'frank.baitman [REDACTED]'; 'Brian.Cook [REDACTED]'; 'Michelle.Snyder [REDACTED]'
Subject: Re: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Thanks, Jessica. Tony and Frank, can you join via phone? You'll only be asked to help with the cybersecurity part of the call :) I am more than happy to deliver the primary talking points, which will focus principally on Marilyn's letter regarding Hub cybersecurity + the general points the three of us hammered out a while back.

Jessica, are you putting together talking points for us, or would you like me to take a crack at them?

Thanks,
Todd

From: Santillo, Jessica
Sent: Tuesday, September 17, 2013 07:13 PM
To: Park, Todd; Trenkle, Tony (CMS/OIS) <[REDACTED]>
Cc: Jones, Isabel; Mielke, Dawn M.; Baitman, Frank (OS/ASA/OCIO) <[REDACTED]>; Cook, Brian T. (CMS/OC) <[REDACTED]>; Snyder, Michelle (CMS/OA) <[REDACTED]>
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Hi Todd happy to have Tony and Frank join us for the cyber security portion.

On your first question the call is on background according to "White House officials."

Thanks very much for making this work on such short notice. We will hold the call in EEOB 207. I will send around a calendar invite.

Thank you again,
Jessica

From: Park, Todd
Sent: Tuesday, September 17, 2013 6:14 PM
To: Trenkle, Tony (CMS/OIS); Santillo, Jessica
Cc: Jones, Isabel; Mielke, Dawn M.; Baitman, Frank (OS/ASA/OCIO); Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA)
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Hi Tony, the part of the call where you, Frank, and I would be participating would focus exclusively on cybersecurity....

Jessica, thoughts?

From: Trenkle, Tony (CMS/OIS) [mailto:████████████████████]
Sent: Tuesday, September 17, 2013 5:08 PM
To: Park, Todd; Santillo, Jessica
Cc: Jones, Isabel; Mielke, Dawn M.; Baitman, Frank (OS/ASA/OCIO); Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA)
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Todd,

I am not really comfortable about participating on this call, even on background. It is getting into areas that I have not been involved in (privacy and fraud prevention efforts).

Tony

From: Park, Todd [mailto:████████████████████]
Sent: Tuesday, September 17, 2013 4:43 PM
To: Santillo, Jessica
Cc: Jones, Isabel; Mielke, Dawn M.; Trenkle, Tony (CMS/OIS); Baitman, Frank (OS/ASA/OCIO); Cook, Brian T. (CMS/OC)
Subject: RE: Preventing Fraud in Marketplaces - WH background call with media tomorrow?

Hi Jessica, I am signed up to help with the call! Looping Tony, Frank, and Brian. Two questions:

1. Is the call on background, or on the record?
2. Can Tony Trenkle and Frank Baitman join me on the call? They are the folks who know the details, and it would be super-helpful for them to be on.

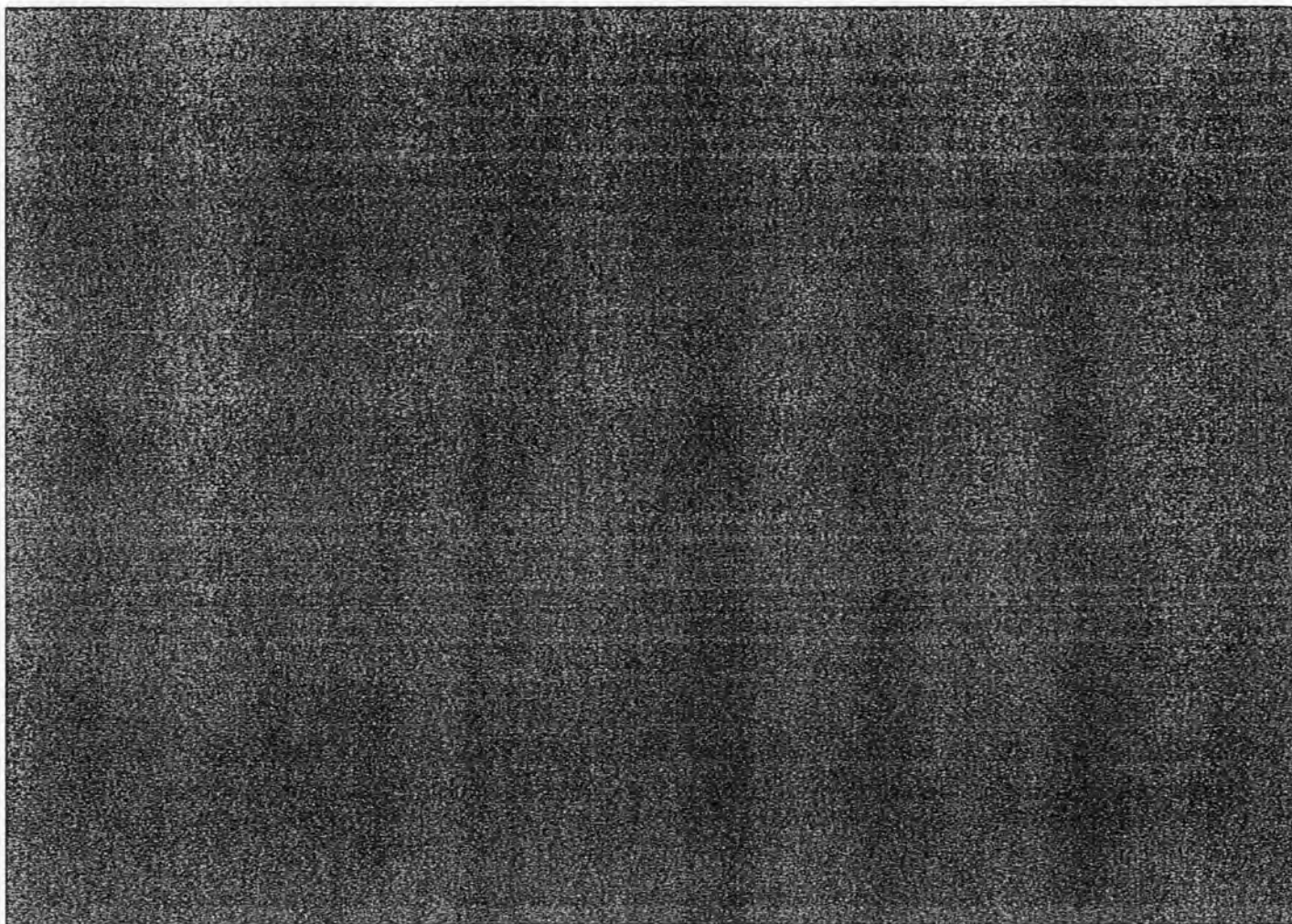
Thanks!
Todd

From: Santillo, Jessica
Sent: Tuesday, September 17, 2013 2:10 PM

To: Park, Todd

Cc: Jones, Isabel; Mielke, Dawn M.

Subject: Preventing Fraud in Marketplaces - WH background call with media tomorrow?



From: Trenkle, Tony (CMS/OIS) <[REDACTED]>
Sent: Wednesday, September 18, 2013 4:25 PM
To: Park, Todd; Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira; Fryer, Teresa M. (CMS/OIS); Mellor, Michael (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

Todd,

Glad to help and I had no doubt that you could deftly handle all of the questions. You probably now have at least a Bachelors' degree in CMS. I will let Gartner know.

tony

From: Park, Todd [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 2:09 PM
To: Trenkle, Tony (CMS/OIS); Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira; Fryer, Teresa M. (CMS/OIS); Mellor, Michael (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

Hi all, the background call went well (knock on wood will wait to see the coverage). Thank you all very much Tony, Team CMS and Frank especially for all of your help! On cyber, I basically delivered a condensed version of the talking points below.

Tony, I did indeed cite Gartner's statement as referenced in the bullet points below, and referenced Christian's name specifically you may want to give Gartner/Christian a heads up about that.

The only question we got on cyber was a question about the Hub ATO on Sept 6 and whether security testing for the Marketplace was done. The answer I gave was that security testing was now complete for the Hub, which is a critical component of the overall Marketplace. Security testing continues for other components of the Marketplace, and CMS is working to ensure that all security testing for Marketplace systems is completed and associated authority to operate is issued before October 1.

Jessica, please let us know if you get any follow-up questions thanks!

Todd

From: Trenkle, Tony (CMS/OIS) [mailto:[REDACTED]]
Sent: Wednesday, September 18, 2013 8:30 AM
To: Park, Todd; Santillo, Jessica; Baitman, Frank (OS/ASA/OCIO)
Cc: Jones, Isabel; Mielke, Dawn M.; Cook, Brian T. (CMS/OC); Snyder, Michelle (CMS/OA); Graubard, Vivian; Vahey, Moira; Fryer, Teresa M. (CMS/OIS); Mellor, Michael (CMS/OIS)
Subject: RE: Cyber bullet points for your review; plus a question

Todd,

The bullets you have written are consistent with the letter as well as the call and statement from Gartner. In terms of other ATOs, I would not characterize it that way because it sounds like we are doing a piecemeal approach. In reality

From: Snyder, Michelle (CMS/OA) <[REDACTED]>
Sent: Sunday, September 29, 2013 4:00 PM
To: Chao, Henry (CMS/OIS); Park, Todd
Subject: Re: Food tomorrow

I am such an ogre!! Of course - eat a cupcake for me

M

Sent from my BlackBerry Wireless Device

From: Chao, Henry (CMS/OIS)
Sent: Sunday, September 29, 2013 02:41 PM
To: Park, Todd <[REDACTED]>
Cc: Snyder, Michelle (CMS/OA)
Subject: RE: Food tomorrow

I think you can come in and help dole out the food and say hello. People here want to be able to at least see you in person. It really makes them feel like someone cares enough about their contribution to do this kind of thing so come in for at least 30 minutes but don't wander to where the architects and engineers (the ones you took a picture with) are because they will never let you leave.

Michelle is it ok for him to come in for 30 minutes and help serve?

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Park, Todd [mailto:[REDACTED]]
Sent: Sunday, September 29, 2013 2:38 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA)
Subject: Re: Food tomorrow

I have the cupcakes -- to manage expectations, they did not have 150 red velvet in stock, so I had to supplement with other flavors :) I will subsequently acquire ice cream. Will hit the road after the 5 pm call -- so would estimate an ETA of 6:30-7 pm. My dad is driving me to ensure the well being of other people on the road :) And as per my promise to Michelle, I will drop off the cupcakes and ice cream and immediately leave :)

From: Park, Todd
Sent: Sunday, September 29, 2013 01:41 PM
To: 'henry.chao' <[REDACTED]>
Cc: 'Michelle.Snyder' <[REDACTED]>

Subject: Re: Food tomorrow

Am on it :)

From: Chao, Henry (CMS/OIS) [mailto:]
Sent: Sunday, September 29, 2013 01:31 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) < >
Subject: RE: Food tomorrow

Cupcakes are for anytime.

Ice cream has never been served here so that will be a surprise.

Tammy (CGI master at taking care of all the staff) has already ordered tonight's dinner so you are in charge of the out of the ordinary surprises.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[redacted]

From: Park, Todd [mailto:]
Sent: Sunday, September 29, 2013 1:29 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA)
Subject: Re: Food tomorrow

I can also totally bring dinner -- just let me know.... Called Georgetown Cupcake, and am going to stand in line at the store now for the cupcakes :)

From: Park, Todd
Sent: Sunday, September 29, 2013 01:24 PM
To: 'henry.chao' < >
Cc: 'Michelle.Snyder' < >
Subject: Re: Food tomorrow

Don't think I got the other email.... But to clarify, I should not bring dinner, but rather, red velvet cupcakes from Georgetown Cupcake and Haagen Daz for 150 folks -- yes? If so, I should jump on that -- the Georgetown Cupcake part in particular -- right now :)


From: Chao, Henry (CMS/OIS) [mailto:]
Sent: Sunday, September 29, 2013 01:20 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) < >
Subject: Re: Food tomorrow

See my later email...



Red velvet cupcakes from Georgetown Cupcakes and Haagen Dazs ice cream bars for about 150 people.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

 (Pri)
(Alt)
(BB)

From: Park, Todd [mailto:
Sent: Sunday, September 29, 2013 01:18 PM
To: Chao, Henry (CMS/OIS)
Cc: Snyder, Michelle (CMS/OA)
Subject: Re: Food tomorrow

Hi Henry, for roughly how many folks should I get dinner? Don't spend more than 10 seconds answering, and err on the high side :)

From: Chao, Henry (CMS/OIS) [mailto:
Sent: Saturday, September 28, 2013 11:57 PM
To: Park, Todd
Cc: Snyder, Michelle (CMS/OA) < >
Subject: Re: Food tomorrow

The address is 593 Herndon Pkwy, Herndon VA. CGI is on the 3rd floor and you need an escort to get in on the weekend so you can call me.


There's a fantastic admin person who takes care of ordering food so I will check with her in the morning on whether if lunch or dinner is better and also get you a count.

I'll call you in the morning but I think likely I think it will be dinner.

Thanks.

Henry Chao
Deputy Chief Information Officer and Deputy Director
Office of Information Services
Centers for Medicare & Medicaid Services
7500 Security Blvd
Baltimore, MD 21244

 (Pri)
(Alt)
(BB)

From: Park, Todd [mailto:
Sent: Saturday, September 28, 2013 11:34 PM
To: Chao, Henry (CMS/OIS)

Cc: Snyder, Michelle (CMS/OA)

Subject: Food tomorrow

Hi Henry, I have permission from Michelle to bring y'all food tomorrow in Herndon on the condition that I leave immediately after delivering the food and not involve you in a long and super-interesting conversation that takes time away from your incredibly important work ☺

Question #1: for how many people should I bring food? I want to bring food for everyone that is working there.

Depending on your answer, I may bring lunch or dinner dinner if the number is really big, because it may take me some time to rustle up that much food ☺

Question #2: What is the address again of the Herndon building?

Thanks!

Todd

From: Park, Todd [mailto: [REDACTED]]
Sent: Monday, September 30, 2013 11:40 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
Subject: RE: New expansion

Laura, thanks so very, very much Henry and I will be awake, by our mobiles, and online, awaiting with bated breath what your team's ingenuity can cook up!

From: Fasching, Laura [mailto: [REDACTED]]
Sent: Monday, September 30, 2013 11:34 PM
To: Park, Todd; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
Subject: RE: New expansion
Importance: High

Todd, thanks the team is looking for options to assist in speeding up the deployments & VM builds give us a little bit to see what else we can do to assist.

Thanks
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039



From: Park, Todd [mailto: [REDACTED]]
Sent: Monday, September 30, 2013 11:02 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
Subject: RE: New expansion
Importance: High

Dear Laura, David, and Chris, thank you so very much for the heroic work you have done and are doing to support Marketplace go-live! We have one more favor to ask:

I understand from Henry that a Verizon/Terremark team is working very hard to activate all the new hardware that's arrived at Culpeper.

Every new VM, every ounce of additional power adds materially to the probability of a successful go-live tomorrow morning.

If there is any possible way that you could 2x, 3x, 4x progress by having teams work in parallel tonight, that would be absolutely amazing.

Possible?

This is a historic moment, and the team is so very close to pulling off a feat for the ages is there any way to amp things up even further?

We would be massively, massively appreciative please contact Henry with questions/thoughts!

All the best,
Todd

Todd Park
United States Chief Technology Officer and Assistant to the President
Executive Office of the President

Mobile: [REDACTED]

From: Fasching, Laura [mailto:[REDACTED]]
Sent: Monday, September 30, 2013 7:22 PM
To: Chao, Henry (CMS/OIS); Park, Todd
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR); Fasching, Laura
Subject: RE: New expansion

All, good news!

The first 2 new compute pools are being presented to infiniCenter now, barring any issues they should be ready in about an hour.

New Compute Pool One (630):

Ghz: 1200
RAM: 2.4 TB
Storage: 40 TB

New Compute Pool Two (631):

Ghz: 1200
RAM: 2.4 TB
Storage: 40 TB

As we discussed today by putting 40TB of storage on each compute pool this leaves you with only 20 TB of Storage which we will allocate 10TB to each pool and turn them up sometime tomorrow.

To meet the new storage requirements that we were given today, which is 40TB for each new compute pool, which there will be 7 new compute pools – we are re locating/ re allocating a NetApp device to your environment. To support this new Net App device, we now have to have additional power run to the cage, as we had already utilized the power that was in place for previously planned expansions.

We anticipate that the new power builds will be completed at noon tomorrow, and we have scheduled the NetApp technicians to be at the data center at noon to configure the devices. When they have completed

their work we can present the additional storage to the second set of new compute pools. While we are working to have the compute and 10TB of storage stood up earlier in the day tomorrow we should have the full storage provision very late on 10/1 or very early on 10/2.

| | |
|--|--|
| New Compute Pool Three (632): | New Compute Pool Four (633): |
| Ghz: 1200 | Ghz: 1200 |
| RAM: 2.4 TB | RAM: 2.4 TB |
| Storage: 10 TB (need to move 6290 to support 30TB) | Storage: 10 TB (need to move 6290 to support 30TB) |

I will know more about the final set of 3 new compute pools; tomorrow afternoon.

If you need more storage than what was discussed today, please let us know as we will need to source additional devices.

Thanks

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Chao, Henry (CMS/OIS) [mailto:[REDACTED]]
Sent: Monday, September 30, 2013 12:06 AM
To: Park, Todd; Fasching, Laura
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
Subject: RE: New expansion

Working with Peter and Hemant to configure the Production environment to accommodate what I calculated on the back of an envelope to be about 550 Virtual Machines by morning of October 1st and taking a conservative estimate of a more complex set of processing loads through the system I think we will have more like a range between 90k to 110k concurrent users depending on the level of complexity of the processing loads.

Will get closer to real numbers as we run more tests and Terremark/URS builds the VMs and release them to us to configure.

Henry Chao
Deputy CIO & Deputy Director,
Office of Information Services
Centers for Medicare & Medicaid Services
[REDACTED]

From: Park, Todd [mailto:]
Sent: Sunday, September 29, 2013 11:37 PM
To: 'Fasching, Laura'; Chao, Henry (CMS/OIS)
Subject: RE: New expansion

Laura, fantastic, thank you!

Henry, quick question: if these two expansions get operationalized for go-live, how far down the path to the 130,000 concurrent users does it take us?

And Laura, when would the 3rd third get deployed?

Thanks!

From: Fasching, Laura [mailto:]
Sent: Sunday, September 29, 2013 11:32 PM
To: henry.chao ; Park, Todd
Cc: Fasching, Laura
Subject: New expansion

Henry & Todd

The builds are going well thus far. We working to complete the first third of your expansion. The team is working now and we are hoping to deliver the first 2500 Ghz earlier than COB with the second third of approx. 2600Ghz later on Monday.

I will be at the XOC in Columbia tomorrow we are running 3 shifts of a PM/SM resource to coordinate and assist with questions, requests & escalations.

I will update you all on the equipment again early tomorrow.

Thanks

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [redacted]
222 W. Las Colinas Blvd, Irving, Texas, 75039

From: Fasching, Laura <[REDACTED]>
Sent: Tuesday, October 01, 2013 2:53 AM
To: Park, Todd; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED] Fasching, Laura
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED])
Subject: Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
RE: New expansion

Todd & Henry,

URS has brought in more resources to assist with trouble shooting and builds.

We continue to keep the teams engaged and working toward our goal of a successful launch.

Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Fasching, Laura
Sent: Tuesday, October 01, 2013 2:08 AM
To: Park, Todd; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR); Fasching, Laura
Subject: RE: New expansion

Todd & Henry

As we have been working with your team to assist you in making the Marketplace launch successful, we continue to work to adapt to your needs.

Right now, I understand that while we add more compute, the team needs the VMs built faster.

In this tasking we are using the best practices that were agreed to as to not induce risk into your builds

- such as utilizing the kickstart process (custom templates of the hardened images) for RHEL 5 & 6; Windows VMs the SQL VMs utilizes a standard image which requires additional time to harden to NIST standards.

However we have found that due to the size of this environment 1500 + VMs, we are seeing an impact to running too many builds at once. As doing too builds at once slows down the process by overwhelming the Virtual Center server.

The options we have to increase the speed of the VM builds introduce a SIGNIFICANT RISK to the environment. We do not suggest either of these options, but I wanted to give you a full picture of the situation.

1. VC Client Basically cloning of existing VMs and while this may seem an easy option
 - a. Old network configs and FW rules have to be removed first. Then the new ones need to be done. very time consuming and manual
 - b. Finally, these VMs will not appear in iCenter. Without them being visible in iCenter, these VMs will be unmanageable in the future & you will not be able to manage the compute resources.

2. VM import may get the VM's in place but they have the exact same issues as noted above.

We have engaged our vendor URS to increase staffing during this time, and will follow up shortly on the results of that endeavor. If we can get a couple more people in now it will assist with allowing some team members to focus on the builds while other field calls and assist with troubleshooting.

Just as we did yesterday when we receive a request for more storage resources than were in either the reserve capacity or in the expansion order. We will work to adapt to your needs during as you bring the Affordable Care Act's Insurance Exchanges to the American public.

Thanks
Laura

Laura Fasching
Director of Public Sector Strategic Accounts | Verizon Terremark
Tel: [REDACTED]
222 W Las Colinas Blvd, Irving, Texas, 75039

From: Park, Todd [mailto:[REDACTED]]
Sent: Monday, September 30, 2013 11:40 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
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Sent: Monday, September 30, 2013 11:34 PM
To: Park, Todd; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS); Thurston, Robert (CMS/CTR)
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Importance: High

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From: Park, Todd [mailto:[REDACTED]]
Sent: Monday, September 30, 2013 11:02 PM
To: Fasching, Laura; Chao, Henry (CMS/OIS); Small, David (David); Drumgoole, Christopher R; michelle.snyder [REDACTED]
Cc: Um, Peter (CMS/CTR); Sharma, Hemant (CGI Federal) ([REDACTED]); Oh, Mark U. (CMS/OIS);