# James Allen Heifner

AGENTIC AI // AUTOMATION // ENTERPRISE OPERATIONS

Builds agents against work he was personally accountable for — and knows when the output is wrong.

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## SUMMARY

Twelve years inside a national health system. Twenty-eight building systems. Ran journal entry accounting across 68 community hospitals, 70+ rehabilitation and behavioral health facilities and 300+ additional sites of care, with a team of 49 accountants. That is exactly the kind of high-volume manual process agentic automation exists to eliminate — and I own the accounting logic underneath it well enough to judge whether an agent's output is actually correct.

Removed 96+ hours of manual work per month and a full business day from the close at a single hospital by building the automation personally, then rebuilt the same process at corporate scale, where the deterministic Python intake now serves 300+ facilities. No vendor engagement. No IT project request. Now building a multi-step agentic system on the Anthropic Claude API aimed at journal entry preparation — on a process I know cold.

This is not a career change. It is the two halves of a career finally pointing at the same job.

The deterministic engine comes first and it is called INTERLOCK — seven components, three built, every removal reasoned and every stage validated. The agent layer goes on top of that, not instead of it: the model drafts, rules written outside the model validate, and a person signs. An agent whose output nobody can check is not automation, it is a liability with good manners.

> An AI you cannot audit is a liability wearing a productivity costume.

## AUTOMATION IMPACT

**96+ hours per month** — of manual work eliminated at a single hospital through automation designed, built and deployed in-house.

**1 full business day** — removed from that facility's month-end close, before the pattern was rebuilt at corporate scale.

**300+ facilities** — served by the journal entry intake automation running in production.

**49 accountants** — led — the subject-matter access that turns business use cases into real agent requirements.

**10+ years in production** — for ASP.NET/SQL applications built and deployed for the Commonwealth of Virginia.

## SELECTED ENGINEERING WORK

### Agentic Journal Entry Preparation

independent build, in progress · Anthropic Claude API, Python

A multi-step agent pipeline for journal entry preparation — the same work I owned at corporate scale. Retrieves source data, applies accounting logic, drafts a structured entry, validates structure, balance and required support in a deterministic layer outside the model, and routes for human approval. The agent proposes; the rules dispose; a person signs. Nothing posts unattended.

### Autonomous Trading Agent

independent build, running · PowerShell, Excel VBA, Alpaca API, Anthropic Claude API

An unattended system on a schedule where being wrong has an unambiguous scoreboard. Four deterministic signals score each stock; the model contributes classification and commentary and has zero influence on any order placed. Explicit hard-coded risk limits, full decision audit trail, Excel dashboard. Paper by default — live execution is deliberately a human decision.

### Enterprise Journal Entry Intake & Automation

Lifepoint Health · deterministic Python · in production

Standardized templates with deterministic Python automation underneath — structure and supporting-documentation validation at intake, routing for review and approval, accounting logic applied identically every run. Explicitly not an AI system, and that is the design: this is the layer an agent has to be measured against.

### RPA Automation Fleet

Clinch Valley Medical Center · multi-year production

Bots across reconciliation, reporting and validation workflows, integrated with GL and hospital financial systems. Removed 96+ hours of manual work per month and a full business day from that facility's close; improved audit reliability through deterministic, logged execution and explicit exception handling.

## PROFESSIONAL EXPERIENCE

### ALLENHBUILDS

Sep 2026 — Present

**Independent — Close Software & Finance Systems**

Building the close-the-books software full time, and taking finance-systems and automation work that keeps the product inside real problems.

- Building INTERLOCK, a close engine: seven components on one substrate that load a population once, convert it at the door and report what will not convert, remove rows in a defensible order, never lose one, stamp a reason on every row that leaves, and validate after every stage rather than only at the end. Three built and running — the accounts payable accrual scrub, the contract labor accrual, and the substrate underneath both.
- The name is the argument. On a railroad an interlocking is the machinery that ties the signals and the switches together so that a route which would put two trains in the same place cannot be set — not a policy against setting it, machinery that will not move. That is the case for letting a close run unattended, and it is what these controls are built as.
- Backed by its own test suite, not by assertion: fifteen tests covering the balance invariant, atomicity, the audit trail and the rule order. One of them takes the guard off, runs the rules in the wrong order, and proves the accrual comes in light while every check still passes and the run still ties. A close that ties is not the same as a close that is right.
- Building an agentic journal entry pipeline on the Anthropic Claude API: retrieve source data, apply accounting logic, draft the entry, validate structure and support outside the model, route for human approval.
- Available for finance leadership, engineering and AI roles, and for fractional or contract finance-systems work.

### LIFEPOINT HEALTH

2014 — Sep 2026

**Interim Director, Journal Entry Accounting** — Jul 2026 — Sep 2026

National health system. Corporate accounting and shared services. A nationwide transition was pulling accounting activity out of hundreds of facilities into one centralized group; templates, intake, review, approval and documentation standards did not exist at that scale.

- Owned journal entry accounting across 68 community hospitals, 70+ rehabilitation and behavioral health facilities, and 300+ total sites of care.
- Led 49 accountants through an active nationwide consolidation, including the eight hospitals acquired from ScionHealth in 2026.
- Wrote the standardized entry templates and the deterministic Python automation behind them. No vendor engagement. No IT project request.
- That system became the intake point for journal entries across the organization and removed hundreds of hours of manual preparation.
- Rebuilt intake, review and approval so entries arrived validated with documentation attached, cutting rework and post-close adjustments.
- Partnered directly with Corporate Controllership, Internal Audit and facility CFOs on policy alignment, control gaps and remediation.

**Global Accountant** — Apr 2026 — Jul 2026

- Closed the books for a multi-facility portfolio inside the newly formed centralized accounting group.
- Built the entry templates and review protocol adopted as the national standard. Promoted to Interim Director in three months.

**Financial Analyst, Enterprise Analytics & Automation** — Clinch Valley Medical Center · 2014 — 2026

- Analytics and systems resource to the CFO, Controller and department leadership at a 100+ bed acute care hospital.
- Took a full business day off month-end close at that facility through process redesign, batching logic and reconciliation automation.
- Deployed RPA automation removing 96+ hours of manual work per month at the facility, improving audit reliability through logged, deterministic execution.
- Owned reporting across 900+ national, local and individual partnerships: pricing, AR analysis, revenue validation and contract billing.
- Built enterprise dashboards, variance and productivity models, pharmacy expense-versus-revenue models and GL validation logic.
- Rebuilt payroll data by hand during the national Kronos outage and kept operations running on stopgap systems for weeks.

## BURCH INDUSTRIAL GROUP / KNL HOLDINGS / KNL, INC. 2024 — 2025

**Vice President of Operations** — concurrent with the role above

- Ran three companies in right-of-way, vegetation management and construction as senior-most operator and de facto CFO, with full licensing authority and P&L ownership.
- Cut $228K in annual cost through asset restructuring, fleet consolidation and capital planning.
- Installed KPIs, telematics, standardized timekeeping and daily field reporting where no measurement existed.
- Wrote the multi-year financial models, cash-flow frameworks and capital acquisition plans used for loan readiness.
- Introduced LLM API calls into the field documentation workflow to rewrite work orders and completion reports, standardizing documentation quality across crews.

## NORTHROP GRUMMAN CORPORATION Held DoD Top Secret clearance during employment 2008 — 2011

**IT Analyst Lead / Software Developer / Critical Outage Coordinator** — Commonwealth of Virginia account

- Designed, wrote and deployed ASP.NET/SQL applications for state agency account management and statewide outage tracking. They stayed in production more than ten years.
- Critical Outage Coordinator for the Commonwealth of Virginia — incident communications to 100+ agencies plus NCIS, VAI and state security offices.
- Managed multi-shift teams for 24/7 uptime and authored the SME documentation that standardized procedure statewide.

### EARLIER CAREER

**Store Manager — Verizon Wireless / A Wireless** *2011 — 2014*
Ran the district's #1 store. Top 10% in the North East Region; sales management tools adopted district-wide.

**Adjunct Professor, IT & Software Engineering — SVCC · UVA-Wise · Russell County Schools** *2009 — 2011*
Taught Java, Visual Basic, .NET Framework, SQL, OOP and SDLC to college students and working professionals.

**Senior Project Manager — National Services Associates** *2003 — 2007*
Managed 1,600+ subcontractors nationwide; executed 6,000+ BP site installations in 90 days, a company record. Led national rebranding conversions: BankOne to Chase, MBNA to Bank of America, Cingular to AT&T.

**Industrial Designer & Developer — ImagePoint** *1998 — 2003*
National signage and architectural branding for McDonald's, Mercedes-Benz and Nissan. Built CGI prototyping that removed millions in manufacturing cost.

### TECHNICAL SKILLS

**LLM & agents** Anthropic Claude API · prompt and system-instruction design · tool and function calling · multi-step and multi-agent orchestration · context management · retrieval-augmented generation · agent output evaluation · Model Context Protocol (studying the specification and integration patterns)

**AI security** Prompt injection and jailbreaking risk · data leakage and sensitive-data handling in a healthcare environment · insecure tool execution · least-privilege tool and system access · secrets management · output validation before write-back · OWASP software security principles

**Languages & engineering** Python · SQL · JavaScript · C# / .NET · VBA · PowerShell · Java · Git · SDLC · REST/JSON API integration · code review · technical documentation

**Cloud & enterprise systems** Azure · Oracle Cloud ERP · Microsoft 365 · SharePoint · Power Platform · ServiceNow · Okta · ERP- and GL-connected workflows · enterprise reporting · RPA design and deployment

### EDUCATION & CERTIFICATION

**King University** Bristol, TN
B.S., Business & Financial Administration, Summa Cum Laude

**Southwest Virginia Community College** Cedar Bluff, VA
A.A.S., Information Systems Technology, Summa Cum Laude

**Lean Six Sigma Green Belt**

Johns Hopkins Engineering | Certification programs in progress
Generative AI - 15-week program | Began October 2026
Agentic AI - 15-week program | Began October 2026