



Department of Administration  
Purchasing Division  
2019 Washington Street East  
Post Office Box 50130  
Charleston, WV 25305-0130

## State of West Virginia Delivery Order

Order Date: 09-20-2021

CORRECT ORDER NUMBER MUST APPEAR  
ON ALL PACKAGES, INVOICES, AND  
SHIPPING PAPERS. QUESTIONS  
CONCERNING THIS ORDER SHOULD BE  
DIRECTED TO THE DEPARTMENT  
CONTACT.

Order Number:	CDO 0511 2680 BMS2200000005 1	Procurement Folder:	934452
Document Name:	Mental Health Parity and Behavioral Health Support	Reason for Modification:	
Document Description:	Mental Health Parity and Behavioral Health Support		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 100 MIDDLE STREET  PORTLAND ME 04101 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kevin L Bowling Requestor Phone: 304-356-4958 Requestor Email: lee.k.bowling@wv.gov  <b>22</b> <b>FILE LOCATION</b> _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

Total Order Amount:	\$368,165.00
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Purchasing Division's File Copy

**ENTERED**

CH 10/7/21  
PURCHASING DIVISION AUTHORIZATION  
DATE: Lunda Harper 10/7/2021  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION  
DATE: Beverly Tiber 10-8-21  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Prospective Delivery Order for Mental Health Parity and Behavioral Health Support as a 95/5 split between BMS and WV CHIP.

Dates of Service: 10/01/2021 - 09/30/2022

Total: \$368,165.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$6,880.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2021-10-01	2022-09-30				

**Commodity Line Description:** Lead Project Manager: Base Year One

**Extended Description:**

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Eduardo Daranyi: 32 hours @ \$215.00 = \$6,880.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$7,290.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2021-10-01	2022-09-30				

**Commodity Line Description:** Engagement Manager: Base Year One

**Extended Description:**

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel: 27 hours @ \$270.00 = \$7,290.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$64,720.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2021-10-01	2022-09-30				

**Commodity Line Description:** Project Management Support Staff: Base Year One

**Extended Description:**

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Melinda Trail: 512 hours @ \$80.00 = \$40,960.00

Support Staff: 297 hours @ \$80.00 = \$23,760.00 (Consists of the following;)

Carole Anne Guay

Molly Hawkinson

Emily Hendrickson

Jordan Ramsey

Jon Williams

Mary Corley

Kyle Melton

Total: 809 hours @ \$80.00 = \$64,720.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$289,275.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2021-10-01	2022-09-30				

**Commodity Line Description:** General Project Manager: Base Year One

**Extended Description:**  
General Project Project Manager: Base Year One

Hourly Rate: \$175.00

Rachel Moss Capper: 444 hours @ \$175.00 = \$77,700.00  
 Peter Alfrey: 125 hours @ \$175.00 = \$21,875.00  
 Valerie Hamilton: 248 hours @ \$175.00 = \$43,400.00  
 Jennifer Elwood: 248 hours @ \$175.00 = \$43,400.00  
 Ethan Wiley: 175 hours @ \$175.00 = \$30,625.00  
 Andrea Clark: 413 hours @ \$175.00 = \$72,275.00

Total: 1,653 hours @ \$175.00 = \$289,275.00

September 1, 2021

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document under CMA #HHR21\*03 to assist the West Virginia (State) Department of Health and Human Resources (DHHR), Children's Health Insurance Program (WVCHIP), and Bureau for Medical Services (BMS) with the planning activities for mental health parity and behavioral health support. As stated in the SOW document, BerryDunn estimates the duration of this work to be 12 months. BerryDunn agrees to an SOW start date effective October 1, 2021. Assuming a start date of October 1, 2021, the work would then conclude on September 30, 2022.

Please let me know if you have any questions or if you would like to discuss the content in this SOW.

We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,



Eduardo G. Daranyi  
Principal  
207-541-2244



**Staffing Plan and Scope of Work for the  
West Virginia Department of Health and Human Resources, Children's  
Health Insurance Program, and Bureau for Medical Services  
Mental Health Parity and Behavioral Health Support  
Prepared for CMA #HHR21\*03**



**Submitted by:**

Eduardo Daranyi, PMP®, Principal  
Nicole Becnel, PMP®, Principal  
Berry Dunn McNeil & Parker, LLC  
300 Capitol Street  
Charleston, WV 25301  
Phone: 207-541-2244  
edaranyi@berrydunn.com  
nbecnel@berrydunn.com

**Initially Submitted on:**

September 2, 2021

**berrydunn.com**



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**Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources, Children's Health Insurance Program, and Bureau for Medical Services  
Mental Health Parity and Behavioral Health Support**

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health and Human Resources (DHHR), Children's Health Insurance Program (WVCHIP), and Bureau for Medical Services (BMS) with the planning activities for mental health parity and behavioral health support. This SOW is henceforth referred to as the BMS and WVCHIP Mental Health Parity and Behavioral Health Support SOW.

## **1.0 Key Information**

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project.

This project describes the tasks that BerryDunn will perform to assist DHHR, WVCHIP, and BMS for the annual Mountain Health Promise (MHP) and Mountain Health Trust (MHT) Compliance Update Reports. Updates for WVCHIP will only apply to the MHT program.

This project will provide support for the State to meet annual Centers for Medicare & Medicaid Services (CMS) requirements for compliance with the Paul Wellstone and Pete Domenici Mental Health Parity and Addiction Equity Act of 2008 (MHPAEA). The objective of this project is to support BMS and WVCHIP in:

- Developing documentation that helps MHP and MHT meet MHPAEA requirements for financial requirements (e.g., deductibles, co-pays), quantitative treatment limits (QTLs), and non-quantitative treatment limits (NQTLs)
- Providing Mental Health Parity training for the State and the MHT and MHP managed care organizations (MCOs)
- Assisting the MCOs with information gathering and data collection, followed by completion of the updates
- Drafting letters to MCOs, if applicable, for any remedial action needed, and/or templates to standardize information supplied by MCOs to be reviewed regularly for mental health parity analysis
- Fielding any follow-up questions from CMS after submission of the Mental Health Parity Reports
- Conducting research for additional potential behavioral health program opportunities for BMS and WVCHIP



- Developing the Medicaid and WVCHIP Behavioral Health Research and Program Analysis, and the Medicaid and WVCHIP Behavioral Health Program Development Plan

Estimates for this SOW are based on the following assumptions:

- All project documents—including updates on meeting outcomes, action items, issues, risks, and decisions—will be on the BerryDunn Microsoft (MS) SharePoint site.
  - BerryDunn will deliver these project documents to the attention of the BMS and WVCHIP project sponsors.
- BerryDunn will provide deliverables to the State in an agreed-upon format.
- The State leadership team will consist of Fred Lewis as the BMS project sponsor; Stacey Shamblin as the WVCHIP project sponsor; Susan Hall as the project lead.
- State staff with the required knowledge base to support the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project will attend project-related meetings. If these individuals are not available or do not participate in the fact-finding interview sessions, then the project schedule, scope, and cost might be impacted.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- DHHR intends to utilize the Medicaid Management Information Systems (MMIS) Implementation Advance Planning Document Update (IAPD-U) approved by CMS on June 30, 2020 which requested \$376,948 and includes federal financial participation (FFP) for the purposes of this SOW. The estimated cost of the services to be delivered under this SOW is \$368,165.
- The BerryDunn leadership team will consist of Ed Daranyi and Nicole Becnel. Rachel Moss Capper will serve as the project lead.
- This work will begin upon approval of this SOW and a mutually agreed-upon date, and is projected to continue for 12 months.



## 2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting our work; and lists the estimated hours for completing each key task. Section 5.0 provides a high-level timeline for the activities described below.

**Table 1: Project Deliverable/Service Approach, Responsibility, and Hours Estimate**

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Project Initiation and Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's leadership team will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues affecting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"><li>Deliverable 1: Commissioner Briefing</li></ul> <p><i>Completion Criteria</i></p> <p>Project Initiation and Engagement Oversight will be deemed complete upon signature acceptance of Deliverable 9: Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.</p>	<p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Rachel Moss</p> <p>Capper</p> <p>Valerie Hamilton</p> <p>Jennifer Elwood</p> <p>Ethan Wiley</p> <p>Andrea Clark</p> <p>Peter Alfrey</p> <p>Melinda Trail</p> <p>Carole Ann Guay</p> <p>Molly Hawkinson</p> <p>Emily Hendrickson</p> <p>Jordan Ramsey</p> <p>Jon Williams</p> <p>Mary Corley</p> <p>Kyle Melton</p>	62
2.0	<p><b>Project Execution and Control</b></p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership team will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"><li>Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and</li></ul>	<p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Rachel Moss</p> <p>Capper</p> <p>Peter Alfrey</p> <p>Valerie Hamilton</p> <p>Jennifer Elwood</p> <p>Ethan Wiley</p> <p>Andrea Clark</p> <p>Peter Alfrey</p>	1,830





Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>State-owned meetings</p> <ul style="list-style-type: none"> <li>Preparing monthly project status updates, risks, issues, and briefings for the State leadership team</li> <li>Managing project logs (action item, decision, issue, and risk tracking)</li> <li>Storing the project documentation repository in an agreed-upon SharePoint location</li> </ul> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> <li>Deliverable 2: Decisions, Risks, and Issues Log</li> <li>Deliverable 3: Project Timeline</li> <li>Deliverable 4: Project Schedule</li> <li>Deliverable 5: Monthly Status Report</li> </ul> <p><i>Completion Criteria</i></p> <p>Project Execution and Control will be deemed complete upon signature acceptance of Deliverable 9: Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.</p>	<p>Melinda Trail</p> <p>Carole Ann Guay</p> <p>Molly Hawkinson</p> <p>Emily Hendrickson</p> <p>Jordan Ramsey</p> <p>Jon Williams</p> <p>Mary Corley</p> <p>Kyle Melton</p>	
3.0	<p><b>MHP and MHT Mental Health Parity Updates and Behavioral Health Research Analysis and Planning</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will work to support the State in its two annual updates to CMS. In addition, BerryDunn will assist the State in developing a Medicaid and WVCHIP Behavioral Health Research and Program Analysis and a Medicaid and WVCHIP Behavioral Health Program Development Plan.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> <li>Deliverable 6: MHT and MHP Mental Health Parity Update (Medicaid and WVCHIP)*</li> <li>Deliverable 7: Medicaid and WVCHIP Behavioral Health Research and Program Analysis</li> <li>Deliverable 8: Medicaid and WVCHIP Behavioral Health Program Development Plan</li> </ul> <p><i>Completion Criteria</i></p>	<p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Rachel Moss</p> <p>Capper</p> <p>Peter Alfrey</p> <p>Valerie Hamilton</p> <p>Jennifer Elwood</p> <p>Ethan Wiley</p> <p>Andrea Clark</p> <p>Melinda Trail</p> <p>Carole Ann Guay</p> <p>Molly Hawkinson</p> <p>Emily Hendrickson</p> <p>Jordan Ramsey</p> <p>Jon Williams</p> <p>Mary Corley</p>	584



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	MHP and MHT Mental Health Parity Updates, and MHP and MHT Mental Health Parity Updates and Behavioral Health Research Analysis and Planning, will be deemed complete upon signature acceptance of Deliverable 9: Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.  * Pending approval from CMS, Deliverable 6: MHT and MHP Mental Health Parity Update (Medicaid and WVCHIP) will include the annual Medicaid and WVCHIP update to CMS for the MHT, as well as annual Medicaid update to CMS for the MHP.	Kyle Melton	
4.0	<b>Project Closeout</b> <i>Service Approach</i> BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS and WVCHIP at project close. Additionally, the Project Closeout Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. <i>Deliverable</i> <ul style="list-style-type: none"><li>Deliverable 9: Project Closeout Summary</li></ul> <i>Completion Criteria</i> BerryDunn services will be deemed complete when the BMS and WVCHIP project sponsors or their designees formally accept and sign the Deliverable 9: Project Closeout Summary.	Rachel Moss Capper Peter Alfrey Valerie Hamilton Jennifer Elwood Ethan Wiley Andrea Clark Peter Alfrey Melinda Trail Carole Ann Guay Molly Hawkinson Emily Hendrickson Jordan Ramsey Jon Williams Mary Corley Kyle Melton	45
Total Hours			2,521
Total Not-to-Exceed Cost Estimate			\$368,165



### 3.0 Project Resources and Hours

The table below displays additional Staffing Plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 1 in CMA #HHR21\*03.

**Table 2: Project Resources**

CL Year 6	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Engagement Manager Nicole Becnel	27	\$7,290
1	LPM	\$215	Lead Project Manager Eduardo Daranyi	32	\$6,880
4	GPM	\$175	Project Lead Rachel Moss Capper	444	\$77,700
4	GPM	\$175	Program Manager Peter Alfrey	125	\$21,875
4	GPM	\$175	Subject Matter Expert (SME) Valerie Hamilton	248	\$43,400
4	GPM	\$175	SME Jennifer Elwood	248	\$43,400
4	GPM	\$175	SME Ethan Wiley	175	\$30,625
4	GPM	\$175	SME Andrea Clark	413	\$72,275
5	SS	\$80	Project Coordinator (PC) Melinda Trail	512	\$40,960
5	SS	\$80	Quality Assurance (QA) Carole Ann Guay Molly Hawkinson Emily Hendrickson Jordan Ramsey Jon Williams Mary Corley Kyle Melton	297	\$23,760



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Year 6					
			Total Hours:	<b>2,521</b>	<b>\$368,165</b>

EM = Engagement Manager

LPM = Lead Project Manager

GPM = General Project Manager

PMSS = Support Staff



## 4.0 Project Hours and Costs Per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project.

**Table 3: Project Costs by Month**

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	3	3	138	67	211	\$ 30,965
Month 2	3	3	138	67	211	\$ 30,965
Month 3	2	3	138	67	210	\$ 30,695
Month 4	2	3	138	67	210	\$ 30,695
Month 5	2	2	138	68	210	\$ 30,560
Month 6	2	2	137	68	209	\$ 30,385
Month 7	2	2	137	68	209	\$ 30,385
Month 8	2	2	137	68	209	\$ 30,385
Month 9	2	3	138	68	211	\$ 30,775
Month 10	2	3	138	67	210	\$ 30,695
Month 11	2	3	138	67	210	\$ 30,695
Month 12	3	3	138	67	211	\$ 30,965
<b>Total</b>	<b>27</b>	<b>32</b>	<b>1,653</b>	<b>809</b>	<b>2,521</b>	<b>\$368,165</b>



## 5.0 High-Level Timeline

The following figure illustrates the proposed high-level timeline for planning activities.

**Figure 1: Proposed High-Level Timeline**

Task	1	2	3	4	5	6	7	8	9	10	11	12
1.0 Project Initiation and Engagement Oversight												
2.0 Project Execution and Control												
3.0 MHP and MHT Mental Health Parity Updates and Behavioral Health Research Analysis and Planning												
4.0 Project Closeout												



### BerryDunn Authorized Signature

As a principal of this firm in our Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is not-to-exceed cost. Work to be invoiced to DHHR will be for actual hours expended, which may or may not equal the projected level of effort, but will not exceed the projected level of effort.

September 8, 2021

Signature

Date

### DHHR Approval of Approach, Staffing, and Not-to-Exceed Cost

September 8, 2021

Signature

Date

### WVCHIP Approval of Approach, Staffing, and Not-to-Exceed Cost

9/8/2021

Signature

Date



## Appendix A: Resumes

Eduardo Daranyi, MEd, PMP®

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal (employed with BerryDunn since 09/2005)
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	Master of Education, Lesley College BS, Physics, Mathematics, and Business Administration, Hillsdale College Certified Project Management Professional® Systems Engineering Development Program, Electronic Data Systems

### Overview

Ed is a principal at BerryDunn with 20 years of experience managing and providing QA oversight of large-scale technology initiatives. He has served in a project management and QA capacity for Medicaid projects in Maine, Iowa, and West Virginia. Prior to joining BerryDunn, Ed worked for Electronic Data Systems as a systems engineer and systems manager. Ed served as implementation project manager for pharmacy benefits management systems and project coordinator while employed by Goold Health Systems.

### Relevant Experience

**BerryDunn (09/2005 to present).** Ed is a principal in BerryDunn's Government Consulting Group, leading the Medicaid practice area.

- **Ohio Department of Medicaid – Ohio Medicaid Enterprise System Independent Verification & Validation (IV&V) Services (12/2016 to present).**  
The Ohio Department of Medicaid is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn is providing IV&V support. As project principal, Ed is overseeing the BerryDunn team.
- **West Virginia Bureau for Medical Services (BMS).**
  - *West Virginia Engagement Manager (06/2012 to present).*  
In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid Data Warehouse / Decision Support System DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; Affordable Care





Act (ACA) analysis, and advisory services; ICD-10 compliance; Eligibility & Enrollment (E&E) systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; WVCHIP implementation and stabilization; access to care planning and monitoring; provider re-enrollment; Asset Verification System procurement; and other related initiatives.

- *QA Oversight of MMIS and Pharmacy Point of Sale (POS) Implementation (10/2005 to 03/2008).*

Ed provided QA services for West Virginia's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA NPI. Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development.

- **West Virginia Department of Health and Human Resources (DHHR) – West Virginia Engagement Manager (06/2012 to present).**

In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.

- **Maine Department of Health and Human Services (DHHS) – IV&V and QA Services (04/2011 to 06/2012).**

BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

BerryDunn also performed a point-in-time readiness assessment for several Pharmacy system initiatives for Maine DHHS, including a HIPAA 5010 transaction set readiness assessment and a pharmacy-related provider portal. Ed served as project manager for this assessment.

- **North Carolina Office of the State Auditor – Independent Audit of the State IT Services Enterprise Project Management Office (EPMO) (04/2007 to 06/2007).**

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of our



evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

**Goold Health Systems (05/2001 to 08/2005).**

- **Iowa Department of Human Services (06/2004 to 08/2005).** Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

From December 2004 to August 2005, Ed served as strategic project manager for Iowa's MMIS Pharmacy POS implementation. In this role, Ed managed implementation activities; prepared project status reports; developed work plans; and conducted research and analysis of programs, projects, and operational procedures.

- **GHS Data Management (04/2000 to 06/2004).** Ed served as project coordinator, technical writer, office manager, and training coordinator for GHS Data Management, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. GHS Data Management is a provider of services to Medicaid agencies across the nation.
- **Maine DHHS (05/2001 to 01/2002).** While employed by GHS, Ed served as technical project coordinator for Maine's MMIS Pharmacy Preferred Drug List and Supplemental Rebate implementation. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

**Electronic Data Systems (08/1985 to 06/1988).** Ed served as Systems Engineer and Systems Manager, with responsibility for maintaining the operating system for a cluster of mainframe computers, troubleshooting hardware and software problems, and overseeing security and access to software on the mainframe computers controlling a General Motors full-size pickup truck assembly plant. As a part of this work, he was on a team that implemented a new manufacturing and assembly system for the truck assembly plant.

**Presentations**

"Flexible Contracting and Contracting Best Practices," Presentation for Medicaid Enterprise Systems (MESOC) 2014, 8/19/2014



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**Nicole Becnel, PMP®**

<b>Proposed Project Role:</b>	Engagement Manager
<b>Role at BerryDunn:</b>	Principal (employed with BerryDunn since 06/2010)
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	BA, Speech and Hearing Science, University of South Florida Certified Project Management Professional®

**Overview**

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 15 years of experience. Her experience includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

**Relevant Experience**

**BerryDunn (06/2010 to present).** Nicole works with BerryDunn's Medicaid Government Consulting Group, and has experience with the following projects:

- **West Virginia Bureau for Medical Services (BMS).**
  - *West Virginia Portfolio Manager (09/2013 to present).*  
In her role as portfolio manager, Nicole provides portfolio management for multiple projects with BMS, including project management of ACA planning, analysis, and advisory services; MMIS, DW/DSS procurement, and project management; E&E systems planning; MITA 3.0 State Self-Assessment (SS-A); and other related initiatives.
  - *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*  
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
  - *Provider Enrollment Application (PEA) Project (07/2011 to 12/2012).*  
Nicole supported the Bureau with her project, program, and portfolio management and subject matter expertise as they implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and



abuse. Nicole also assisted with provider outreach activities including presentations and training at provider workshops held throughout the State.

- *5010 Refresh Project (10/2011 to 08/2013).*

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs version 5.1 to version D.0. This work included project management of deliverable review, SME advisory services, user acceptance testing (UAT) plan assistance, operational readiness assessment, and post-implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).**  
As engagement manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization for the Replacement MMIS. In her role, she was responsible for the oversight of the leverage and reuse, testing, and certification project activities.

**Unisys MMIS Operations (now Gainwell) (09/2001 to 06/2010).**

- **Project Manager for MIHMS Provider Enrollment Application Project.** Nicole served as project manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.
- **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time, and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross



communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.

- **Contract Configuration and Reports Lead for West Virginia MMIS.** Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.
- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

#### **Presentations**

"Modularity GPS: Defining the Roadmap and Understanding the Landscape," Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 8/16/2016

"Managing in a Modular MMIS Implementation," Presentation for MESC 2014, 8/21/2014



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**Rachel L. Moss Capper, LCSW, MSW**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant (employed full-time with BerryDunn since 12/2018)
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	MSW, Social Work, West Virginia University BA, Psychology (minor in Communications), West Virginia University Licensed Certified Social Worker, West Virginia Board of Social Work Examiners Licensed Graduate Social Worker, West Virginia Board of Social Work Examiners

**Overview**

Rachel is an experienced grant writer and trainer, with experience securing millions of dollars from various local, state, and federal funding opportunities. She is an MINT-trained Motivational Interviewing Trainer, a Central East Regional Trainer for the National Rural and Frontier Addiction Technology Transfer Center, and a former WV's Women's Service Network and Youth Coordinator representative for the National Association of State Alcohol and Drug Abuse Directors (NASADAD). She completed the National Council for Behavioral Health's yearlong Value-based Initiatives Academy for integrated healthcare organizations, and was a nominated member of the following organizational oversight committees (Pretera Center): Health & Safety Compliance, CARF Compliance, Consumer Grievances, and Electronic Health Record Beta Tester and Implementation Lead.

**Relevant Experience****BerryDunn (12/2018 to Present)**

- **West Virginia Bureau for Medical Services (BMS)**
  - *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (12/2018 to present).*  
Rachel supports the 1915(c) Waiver project with business analysis and management tasks.
  - *Substance Use Disorder (SUD) Waiver Initiative Project (12/2018 to present).*  
Rachel supports project analysis, reporting, and evaluation for this Medicaid 1115 demonstration waiver focused on addressing the SUD epidemic.



**Independent Consultant, Trainer, and Grant Writer (06/2018 to present).** Rachel facilitates an array of business development opportunities for healthcare provider organizations in the Greater Kanawha Valley and Tri-State regions of West Virginia, Ohio, and Kentucky.

**WestCare Foundation, Inc. (2016 to 06/2018).** As a program administrator for HealthCare System Services, Rachel conducted funding diversification research and development for a nationwide network of behavioral health and integrated care programs. This work included federal and local grant writing, training, and consultation.

**West Virginia Bureau for Behavioral Health (2012 to 2016).** Rachel served as the program manager for the Division for Alcoholism and Drug Abuse, where she oversaw substance use treatment and recovery programming for the Single State Authority (WVDHHR-BBHFF); an excess of \$50 million in federal and state funds.

**Prestera Center for Mental Health Services, Inc. (2005 to 2012).** Rachel held several positions with the Prestera Center, including the director of the Crisis Stabilization Unit, a supervisor of the Children's Department of Community Based Services, a supervisor of the Assisted Living Facility and Forensic Residential Project, and a housing specialist for Care Coordination.



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**Peter Alfrey, PMP®, Prosci® CCP**

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<b>Proposed Project Role:</b>	GPM OD Lead
<b>Role at BerryDunn:</b>	Manager (employed with BerryDunn since 03/2014)
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	MA, History, Providence College BA, Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional® Six Sigma Green Belt Certification Prosci® Certified Change Practitioner (CCP)

**Overview**

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects for the West Virginia Department of Health and Human Resources and BMS, Peter brings comprehensive knowledge about health plan operations, process improvement, procurements and vendor management, and best practices that support Medicaid and health and human services client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives and policy initiatives.

**Relevant Experience****BerryDunn (03/2014 to Present).**

- **West Virginia Bureau for Medical Services (BMS)**
  - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).*

Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and advance planning document (APD) development; and research and tracking of industry trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's MCO and data/analytics programs providing program oversight. EPMO projects and programs include:

    - *MCO Encounter Data Quality (06/2020 to present).*

Peter provided project oversight and serves as a business analyst





supporting State initiatives to optimize MCO encounter data processes for the State's risk-based managed care programs. The State seeks to retire a historical file submission process from the MCOs to their MMIS fiscal agent, in coordination with the MCOs and the State's data warehouse/decision support solution (DW/DSS) vendor, IBM® Watson Health.

- *Data Improvement Project (09/2019 to present).*  
Peter provides program oversight for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program. BerryDunn helps BMS assess and address data quality and usability issues within the State's MMIS environment and other systems across the State's Medicaid Enterprise.
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to present).*  
Peter provides project oversight and procurement assistance support for the procurement and implementation by July 1, 2020, of the three MCOs that comprise the current MHT program.
- *Contact Tracing (04/2020 to 09/2020).*  
Peter provided project management support to DHHR for the implementation of the State's COVID-19 contact tracing platform in August 2020, helping the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. He also supported the procurement and implementation of the contract tracing platform in less than three months, helped develop project communications and training tools, and developed 12 staff hiring requirements and job descriptions to support contact tracing and future Bureau for Public Health disease investigation efforts.
- *Coordinated Care Management Project Management and Procurement Assistance / MHP Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020).*  
Peter provided program management oversight for the desktop review of documentation for the MHP MCOs to help ensure the MCO met the operational standards of the MHP, a specialized managed care program to serve children in foster care and adoption assistance in the State. In addition, Peter provided project oversight and procurement assistance for the project, and developed policies and procedures for the procurement and implementation of the MCO for the MHP program that began operations on March 1, 2020. In addition, Peter provided project oversight



for the MHP program as it transitioned to operations in March 2020 with the MCO, Aetna Better Health® of West Virginia.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).*

Peter serves as the organization development lead for the project leading the development of the organization development plan, roadmap, and schedule to help the State assess areas for improvement and change specific to departmental and Bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019).*

Peter was the project manager for the SUD waiver initiative leading the implementation of the "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration effective January 1, 2018, to December 31, 2022, which allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. He managed a large, cross-functional team focused on areas such as annual and quarterly reporting to CMS and financial reporting requirements for budget neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018).*

Peter served as project manager for the Asset Verification System project that supported the State's objective of procuring Asset Verification System-related services for the State's Medicaid program. Under Peter's leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.

- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and UAT support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating



updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

- **West Virginia Children's Health Insurance Program (WVCHIP)**

- *Operational Readiness Review (09/2020 to present).*

Peter provides program management oversight for the desktop review of documentation for three MCOs to help ensure standards of the MHT and WVCHIP are met by the MCOs for the WVCHIP carve-in into the MHT by January 1, 2021.

- *MCO Transition Planning Project Phases I and II (03/2019 to present).*

Peter provides project oversight to help the State integrate the WVCHIP member population with the State's Medicaid population to the MHT managed care program by January 1, 2021.

- **West Virginia Department of Health and Human Resources (DHHR).**

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present).*

Peter provides program oversight of the project that provides project management services, procurement assistance, and facilitation of the integration of data sources to the EDS and CMS certification support for the EDS Project.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019).*

Peter served as the organizational change management (OCM) lead for the IES, providing strategic direction and oversight to the project team. Peter built a joint team of individuals from the IES vendor, Optum, and BerryDunn to launch the OCM program and supporting communications campaign. During that time, OCM became a core component of the IES/PATH project. Through Peter's leadership, the OCM team created an OCM plan to launch OCM efforts for the project; created a communications toolkit and communications materials; and conducted over 50 interviews with individuals across DHHR for an OCM readiness assessment to support the IES/PATH project.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).**

Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect



management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.

- **Vermont Green Mountain Care Board** – *Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014).*

Peter led the efforts to help the Green Mountain Care Board build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.

- **Maryland Health Benefit Exchange (HBE)** – *Independent Verification & Validation for Maryland's HBE Implementation (03/2014 to 04/2014).*

As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

**Martin's Point Health Care (12/2008 to 02/2014).** As the operations manager, Peter provided performance monitoring, process improvement, project management, data management, and operational efficiency and effectiveness for Martin's Point's Medical Management group. He managed cross-functional teams to implement complex projects; managed vendor relationships and contract negotiations; and served as client contact for external care management vendors.

**Health Dialog (07/2006 to 11/2008).** As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and CMS. He also managed cross-functional implementation teams, maintained communications with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative overseeing product development work and collaboration with third-party vendor.

## Presentations

*The 2020 Final Rule—Understanding new flexibilities to control costs and deliver care*, a BerryDunn blog, 11/2020

*COVID-19 and Opportunities to Reboot Managed Care*, a BerryDunn blog, 09/2020



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*The Case for Data Governance in the Modular Medicaid Enterprise*, a BerryDunn blog, Medicaid Enterprise Systems Conference (MESC), 09/2016

Session abstract *"State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for partnership and collaboration, leverage and reuse"* selected by MESC organizers for a conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016

*Innovation in a Digital Era: Using Data to Pivot to "the New"* presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016



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**Valerie Hamilton, JD, MHA, RN**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager (employed with BerryDunn via Compass Health Analytics, Inc. since 2016)
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	JD, The Ohio State University College of Law MHA, Division of Health Services Management & Policy, College of Public Health, The Ohio State University BA, Psychology, The Ohio State University RN, Diploma, Providence Hospital School of Nursing

**Overview**

Valerie, an experienced clinician and legally trained health policy expert, has significant experience in clinical provider operations, healthcare policy, healthcare law, QA and management practices, and healthcare business operations. Her previous years as a critical care nurse combined with her healthcare management experience and health policy expertise allow for unique insight into the issues that enhanced transparency is intended to address. She will assist the team in interpreting relevant state and federal laws to summarize key issues and develop an effective work plan and will provide continued support throughout the project.

**Relevant Experience**

**BerryDunn (formerly Compass Health Analytics) (2016 to present).** As a health policy manager, Valerie is responsible for reviewing and summarizing literature on medical efficacy of healthcare services, including issues related to insurance coverage and benefits. She manages projects which include medical efficacy review and related cost estimates.

**Promerica Health, LLC (2014 to 2016).** As the vice president of Compliance and Communication, Valerie launched the health and wellness screening laboratory. She also oversaw clinical operations, compliance, quality, accreditation, and licensing.

**Prudential Financial (2013 to 2014).** As a clinical consultant, Valerie collaborated with other professionals to evaluate disability claims for potential and capacity for return to work based on physiological and social factors.

**The Ohio State University Wexner Medical Center (2000 to 2013).** Valerie served as a legal consultant, performing reviews of medical liability lawsuits. Prior to this position, she served as the Director of Quality and as a hospital attorney from 2000 to 2002, responsible for monitoring and improvement of quality at a satellite hospital location. She oversaw quality initiatives and



assisted with Joint Commission on Accreditation of Healthcare Organizations (JCAHO) accreditation.

**HeartCare, Inc. (1998 to 2000).** As a practice administrator, Valerie was responsible for business operations and growth of this invasive cardiologist practice.

**Clinical Medical Experience (1992 to 1997)**

- Grant Medical Center, Registered Nurse – Critical Care
- Grant / Riverside Methodist Hospitals / OhioHealth, Graduate Administrative Associate (Internship) / Program Coordinator (Project Based)
- The Ohio State University Wexner Medical Center, Graduate Administrative Associate / Research Assistant / Registered Nurse



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**Jennifer Elwood, FSA, MAAA**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Principal (employed with BerryDunn via Compass Health Analytics, Inc. since 2014)
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	MS, Statistics, University of Connecticut BS, Mathematics – Statistics and Psychology, University of Connecticut Fellow, Society of Actuaries (FSA) Member, American Academy of Actuaries (MAAA)

**Overview**

Jennifer has 20 years of experience as a healthcare actuary across a wide range of actuarial functions. Her experience includes projecting population cost experience and risk for pricing and risk sharing, especially in new initiatives, including extensive work related to implementing the ACA in commercial insurance, and projecting the state-level impact of expanding the Medicaid population. She also has experience analyzing risk-sharing arrangements, performing claim liability analysis, rate development, budget development, and financial monitoring.

**Relevant Experience**

**BerryDunn (formerly Compass Health Analytics) (2014 to present).** As a principal and co-leader of BerryDunn's actuarial services, Jennifer assists nonprofit MCOs with claim liability analysis, rate development, budget development, and financial monitoring. She works with her clients to develop large employer claims projections, estimate the impact of proposed benefit mandates for state government policy makers, and assist state regulators with market conduct rate review audits.

**WellPoint, Inc. (1998 to 2014).** Jennifer served in several roles of increasing responsibility during her 16-year tenure with WellPoint:

- **Northeast Regional Pricing Director (2012 to 2014).** Responsible for individual and commercial pricing function in Connecticut, Maine, and New Hampshire, managing a team of three state pricing directors and seven analysts; coordinated rate development and preparation of rate filings and certifications for individual and commercial business; collaborated with state and regional leadership to achieve profitability and membership goals; provided strategic guidance to state pricing directors and ensured corporate directives were met while balancing state objectives
- **Northeast Regional Lead and Connecticut Pricing Director (2010 to 2012).**





Responsible for commercial pricing function in Connecticut and managing a pool of seven analysts supporting the pricing needs of Connecticut, Maine, and New Hampshire; supported the Connecticut State President as a strategic business partner and primary actuarial point of contact for internal and external constituents; participated in quarterly forecast and annual planning process; served as the actuarial representative for ongoing Connecticut Exchange Board and Department of Insurance meetings with health insurance carriers

- **Northeast Valuation Director (2008 to 2010).** Responsible for the valuation function in Connecticut, Maine, and New Hampshire; managed staff of eight associates responsible for estimating claim liabilities and other reserves for commercial, consumer, and FEP business; directed development of statutory and GAAP reporting, including support of actuarial certification and SOX control testing and certifications; coordinated actuarial portion of external audits and supported DOI audits
- **Northeast Forecasting Director (2006 to 2008).** Responsible for forecasting commercial and individual business in Connecticut, Maine, and New Hampshire; managed staff of five associates responsible for developing the annual budget, quarterly forecasts, and detailed monthly variance analysis; acted in a peer review capacity by fully developing all assumptions and reconciling them with ongoing pricing and valuation development
- **Connecticut and New York Forecast Lead (2001 to 2006).** Developed the annual budget and quarterly forecasts for the Connecticut Commercial Business and Anthem Health and Life of New York; provided key financial information to executive management through forecast modeling and analysis of monthly results; developed and enhanced forecasting models to increase speed and accuracy of forecast process



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**Ethan Wiley, MPPM, PMP, Prosci® CCP, LSSGB**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager (employed by BerryDunn since 07/2014)
<b>Years of Experience Relevant to Proposed Role:</b>	6 years
<b>Certifications and Education:</b>	Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis BA, Political Science and History, University of Maine at Farmington Certified Project Management Professional Prosci® Certified Change Practitioner Certified Lean Six Sigma Green Belt

**Overview**

Ethan is a manager for our Government Consulting Group with progressive healthcare system experience across the breadth of the Medicaid Enterprise. His specialties include 1115 waivers, federal health programs and legislation, health policy and program development, strategic planning, analysis, remediation, and implementation. An experienced project manager in both Medicaid HIT and policy projects, Ethan has engaged in leadership roles in projects designed to evaluate project, program, and provider performance. These efforts have been inclusive of providing support with determining the implications of, and advising on, federal regulation, design of waiver programs, data collection, managed care compliance, waiver evaluation design, and reporting requirements.

**Relevant Experience**

**BerryDunn (07/2014 to present).** Ethan has worked across practice areas for BerryDunn's Government Consulting Group. Project highlights include the following.

- **West Virginia Bureau for Medical Services (BMS).**
  - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 to present).*  
As program manager, Ethan oversees a team, which assists DHHR in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project is to assist the DHHR with MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA



support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to present).*

As project manager, Ethan plans and executes the design, negotiation and implementation of a Medicaid Home and Community Based (HCBS) waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for CSED who are enrolled in the CSEDW program. The CSEDW permits WV to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.

- *Technical Assistance and Program Support Project (11/2018 to present).*  
Serving as the overall program manager and SME Ethan oversees a project as which provides project management, subject matter expertise, and support activities for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake. Ethan and his team perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development.

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*  
Working as the lead policy analyst and SME for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

Serving as the data management lead for phase 2 of the project, Ethan worked to design tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of West Virginia's program.

Serving as program manager for phase 3 of the project, Ethan oversees the project manager and leads. In addition to ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to ensure quality program design.



- *Third-Party Liability Options Analysis Project (07/2018 to 12/2018).*  
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led investigated both solution and financing alternatives for the State to conduct their Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.
- *Gap Analysis and Project Management Services (10/2016 to 06/2018).*  
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017).*  
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a state-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 to 02/2016).*  
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, SIT, and UAT, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 to 12/2015).*  
As business analyst, Ethan was brought in to organize and complete the final development of a State Medicaid agency project to develop a major requests for proposals (RFP) to select a utilization management vendor.
- **Nebraska Department of Motor Vehicles – Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 02/2017).**  
As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current state assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.
- **Michigan Department of Education – Early Childhood Data Governance Structure (03/2016 to 06/2016).**  
As a business analyst for the Department's data governance project, Ethan developed



and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

- **West Virginia Bureau for Children and Families – Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016).**  
Ethan served as substitute project manager on a QA project to oversee the implementation of an enterprise content management solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple state agencies, and facilitated a smooth implementation.
- **Colorado Department of Human Services (DHS) – Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 to 10/2014).**  
Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.

**University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014).** As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

**Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013).** As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

**The Cutler Institute for Health and Social Policy (11/2012 to 01/2013).** Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and state plan amendments, performing literature reviews, and assisting with general research.



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**Andrea L. Clark, MS, Prosci® CCP**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager (employed with BerryDunn via Compass Health Analytics, Inc. since 2002)
<b>Years of Experience Relevant to Proposed Role:</b>	20+ years
<b>Certifications and Education:</b>	MS, The University of Wisconsin, Economics BSFS, The Edmund A. Walsh School of Foreign Service, Georgetown University, Economics, <i>magna cum laude</i> , Phi Beta Kappa Prosci® Certified Change Practitioner (CCP) Member, American Economic Association Fluent in Spanish

**Overview**

Andrea is a senior economist and data scientist with a primary focus in healthcare systems and finance. Her expertise includes designing, managing, and analyzing large, complex healthcare databases; training state Medicaid agency clients in data quality and analytics; acting as a Health Insurance Portability and Accountability Act (HIPAA) privacy rule de-identification expert; preparing Medicaid managed care capitation rate bids; and assessing health insurance benefit mandates for state legislatures. She is heavily involved in healthcare reform initiatives, including, but not limited to, modeling projected financial impacts of Medicaid expansion and public health crises for health maintenance organization (HMO) clients.

Prior to joining BerryDunn and its Health Analytics Practice Area (HAPA), Andrea was a consulting economist for a Big Four consulting firm, conducting projects ranging from litigation support for a pharmaceutical firm to assessing treatment effectiveness for the federal Substance Abuse and Mental Health Services Administration.

**Relevant Experience**

**BerryDunn (formerly Compass Health Analytics) (2002 to present).** Andrea conducts quantitative research on various healthcare topics, with a primary focus on public-sector behavioral health and topics in healthcare reform. She acts as a HIPAA privacy rule de-identification expert; prepares Medicaid managed care capitation rate bids; advises Medicaid HMOs on market impacts of major policy and economic shifts; assesses health insurance benefit mandates for state legislatures; and advises state Medicaid agency clients on data quality and analytics.

- **West Virginia Department of Health and Human Resources (DHHR) – Child**



*Welfare Initiatives Project Management Services (06/2020 to present).*

Andrea leads the HAPA team supporting the DHHR's Bureau for Children and Families (BCF) in implementing its May 2019 Americans with Disabilities Act (ACA) agreement with the United States Department of Justice (DOJ). She designs and implements analyses and coordinates efforts to design and build a data reporting system and dashboard to enable the State to reach critical milestones in the agreement.

- **West Virginia Bureau for Medical Services (BMS)**

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to present).*

Andrea provides oversight and Medicaid encounter data subject matter expertise to support the State's ongoing initiative to optimize MCO encounter data processes for its risk-based managed care programs.

- *Data Improvement Project (10/2019 to present).*

Andrea spearheaded the development of this project and provides strategic oversight and Medicaid data subject matter expertise to this effort. The Data Improvement Project empowers the State to identify, assess, and address data quality and usability issues across the State's Medicaid enterprise data systems by bringing together disparate Medicaid data users and consumers for training and feedback, deep analytical research, and development of process improvement recommendations.

- *MMIS Contract Edit Review – Outpatient Surgery (04/2019 to 11/2019).*

Andrea led a team that analyzed BMS claims data to assess outpatient hospital surgery provider compliance with the BMS outpatient hospital surgery fee schedule, identifying potential cost savings opportunities for the State.

- *Adult Quality Measures Grant Project (10/2017 to 12/2017).*

Under a federal grant, the State requested BerryDunn to develop, teach, and record an original continuing education curriculum on quality improvement to supplement training and continuing education resources for the BMS Quality Unit team. Andrea developed and presented an original curriculum on data quality, statistics, and healthcare analytics.

- *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).*

Andrea provides claims and encounter data analysis and Medicaid SUD program expertise supporting the State's expansion of evidence-based care for Medicaid members with opioid use disorder (OUD) and other



SUDs.

- **New Hampshire Insurance Department (NHID)**

- *Mental Health Parity Compliance Assurance Plan (CAP) Monitoring (05/2020 to present).*

Andrea is the data analytics lead for this effort overseeing examinations of commercial health insurer mental health provider network adequacy and reimbursement under the federal Mental Health Parity and Addiction Equity Act (MHPAEA) and state parity laws. To test for parity, New Hampshire utilizes innovative, nationally recognized quantitative methodologies developed in collaboration with HAPA using the New Hampshire Comprehensive Health Care Information System (NH CHIS), New Hampshire's APCD.

- *Healthcare Analytics (06/2016 to 12/2019).*

As the engagement manager for this contract, Andrea collaborated with NHID's Health Economics and Actuarial teams to establish priorities for contract resources and led a team of analysts in designing and implementing a variety of complex analyses of the NH CHIS. Sub-projects included identification of potential targets for fraud, waste, and abuse investigation and recovery; a quantitative study of variances in commercial health insurer provider contracting to inform regulatory decisions to promote consumer value; and the development of a public-facing report on statewide ambulance transportation utilization and expenses in the commercial market.

- *NH CHIS Public Use Data Set Redesign (02/2017 to 11/2017).*

In close collaboration with personnel from multiple state agencies, Andrea designed an enhanced public-facing state healthcare utilization reporting system with strong personal privacy protections. She developed a public-facing HIPAA expert determination report on the effort, implemented the enhancements in a test environment, and presented the proposed enhancements in a stakeholders meeting.

- **Massachusetts Center for Health Information and Analysis (MACHIA)**

- *Prospective Mandated Benefit Reviews prepared for the Massachusetts State Legislature (2004 to present).*

Andrea supports MACHIA in meeting statutory obligations to the legislature and informs legislative debate by co-authoring public reports and managing Massachusetts All Payer Claims Database (MA APCD) data analytics for actuarial assessments of proposed Massachusetts state-mandated health insurance benefits.





- *Quadrennial Review of State-Mandated Health Insurance Benefits and Health Insurance Costs in Massachusetts (2006 to present).*  
Andrea led the MA APCD cost analysis and co-authored the 2008, 2013, and 2016 quadrennial editions of this statutorily mandated, public-facing report. She currently supervises the MA APCD cost analysis team developing the fourth quadrennial report, expected to be published in 2021.

- **Community Care Behavioral Health (CCBH)**

In support of this Pennsylvania Medicaid behavioral health MCO covering over 1,000,000 lives, Andrea consults to senior management on projected financial effects of Medicaid program changes and major public health events (e.g., COVID-19). In 2002, she was the architect and builder of CCBH's first data warehouse, greatly expanding access within the organization to performance reporting and actionable information. CCBH's Decision Support Department continues to use this original mart structure; the HAPA team continues its role supporting and enhancing the system and providing analytical programming expertise. Andrea led a separate data warehousing, management, and analysis effort enabling CCBH to be the recognized leader in implementing state-mandated efforts to share de-identified physical health, pharmacy, and behavioral health data and improve care coordination between behavioral and physical health Medicaid MCOs. Starting in 2005, she led HAPA's efforts in support of the preparation of CCBH's capitation rate proposals to the state, including coordinating clinical and actuarial input.

**PricewaterhouseCoopers LLP (1997 to 2002).** Andrea's positions with PricewaterhouseCoopers included:

- *Senior Associate:* Developed and implemented economic, statistical, and financial analyses in a variety of fields, including healthcare and consumer credit. Managed multiple-track analyses of opposing party data. Supervised staff in implementing complex analyses.
- *Associate:* Responsible for management and analysis of large databases. Developed and implemented econometric analyses of outcomes in employment discrimination, fair lending, and anti-trust matters.

**Klemm Analysis Group, Inc. (1996 to 1997).** As an economist, Andrea performed data management and analysis for litigation support and government clients, including analysis of the National Household Survey on Drug Abuse for the Substance Abuse and Mental Health Services Administration.



## Melinda Trail

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant (employed with BerryDunn since 07/2018)
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	Business Administration, York Technical College Business coursework, Gaston College

### Overview

Melinda is a skilled project coordinator, experienced in administrative and supervisory tasks, quality client service, and project organization. She is highly motivated, with superb communication skills and an organized methodology.

### Relevant Experience

**BerryDunn (07/2018 to present).** Melinda serves Medicaid clients from BerryDunn's Charleston, West Virginia office.

- **West Virginia Bureau for Medical Services (BMS) – MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2018 to present).**  
Melinda supports West Virginia's annual State Self-Assessment project work, serving as a business analyst.

**City National Bank of West Virginia (10/2016 to 07/2018).** As a senior wire/ACH specialist with City National Bank, Melinda was responsible for daily settlement of correspondent accounts including the Federal Reserve Bank account, ACH processing, Corporate Cash Management customer support and ACH reconciliation. She worked closely with management to implement procedures, and provide leadership in supervising and developing employees. In addition, she handled branch and customer calls, processed incoming and outgoing wires, performed ACH reconciliation for the Federal Reserve Bank and other settlement accounts, processed affidavits, and verified prenotes and death notifications for treasury.

**Spilman, Thomas & Battle, PLLC (07/2007 to 10/2016).** Melinda served as a legal assistant, responsible for organizing, scanning, and distributing all legal documents pertaining to the Workers Compensation and Federal Black Lung cases assigned to the office. She was also responsible for requesting medical records for all Federal Black Lung and Workers Compensation claims, and updating claim file databases with Workers Compensation and Federal Black Lung case information.

**West Virginia Office of Judges (09/2002 to 07/2007).** As an administrative assistant, Melinda was responsible for retrieving electronically imaged documents to verify claim information, image quality, and data completeness. She linked electronically imaged documents to the designated issues that were in litigation, maintained daily logs and reports, and developed operational procedures and manuals. This position required her to keep informed of the



principles and applications of law, evidence, and pleadings as well as state, federal, and local laws.

**Bank of America (09/1995 to 10/2000).** As a customer service manager and teller coordinator, Melinda operated a full service teller window, supervised and participated in the hiring and training of all tellers, performed bank audits, corrected balance inaccuracies, attended monthly seminars on fraud and loss prevention, and maintained bank vault and ensured cash availability in order to operate efficiently.



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**Carole Ann Guay**

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<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator (employed with BerryDunn since 10/2014)
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	Currently working towards BS in Accounting, University of Southern Maine

**Overview**

Carole Ann is an experienced project coordinator and technical analyst. She is a dependable individual contributor and works to a cohesive team member. She has excellent organizational skills that she applies to her client project work.

**Relevant Experience**

**BerryDunn (10/2014 to present).** Carole Ann serves as a project coordinator for BerryDunn's Government Consulting Group, with additional administrative duties. Selected project work includes:

- **Oregon Enterprise Technology Services (OR ETS) – Integrated IT Service Management (ITSM) (03/2018 to present).**  
Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.
- **Colorado Office of the State Auditor – IT Evaluation (09/2017 to present).**  
Carole Ann coordinates document request items, status reports, meeting requests, and data management.
- **New Mexico Corrections Department (NMCD) – COTS Offender Management System (OMS) Replacement (11/2016 to present).**  
Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN – Information Security Program Development (05/2016 to present).**  
For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.



- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**  
BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.
- **Minnesota Health Benefit Exchange (MNSure) – Programmatic Audit (10/2015 to present).**  
BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.
- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**  
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**  
Carole Ann served as an analyst for West Virginia E&E Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**  
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**  
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

**Webber Energy Fuels (2004 to 2014).** As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.



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**Molly Hawkinson**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Editor (employed with BerryDunn since 09/2019)
<b>Years of Experience Relevant to Proposed Role:</b>	3 years
<b>Certifications and Education:</b>	Certificate, Editing, University Of Washington BS, Media And Communication, New York University

**Overview**

Molly is a staff editor on BerryDunn's Editorial/QA team who copyedits and proofreads internal and client-facing documents. She also develops and presents educational materials to teach consultants and other members of the firm best practices for business writing. She holds a Certificate in Editing from the University of Washington and a Bachelor of Science degree from New York University.

**Relevant Experience**

**BerryDunn (09/2019 to present).** Molly is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes. She also develops presentations and other educational materials, such as monthly e-blasts, for the firm, and effectively manages multiple projects with different deadlines.

**Rev (2018 to 2019).** Molly served as a video captioner, captioning videos for documentaries, commercials, and short films. She followed house style guide and received consistent high reviews from clients.

**Sirius XM Radio (01/2009 to 05/2009).** As an intern, Molly monitored and maintained social media for a daily four-hour radio show. She wrote and edited daily blog and show recaps, conducted interviews, and created content read live on the air.



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**Emily Hendrickson**

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<b>Proposed Project Role:</b>	Project Management Support Services
<b>Role at BerryDunn:</b>	Paraprofessional (employed with BerryDunn since 07/2017)
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	BA, English Literature and Language, Gordon College BA, Biblical and Theological Studies, Gordon College

**Overview**

Emily is a paraprofessional with BerryDunn's Government Consulting Group, specializing in document QA, editorial duties, and project coordination. She works with clients across BerryDunn's areas of focus, including local government entities, higher education institutions, and state agencies. She is a published author, and an experienced copyeditor.

**Relevant Experience**

**BerryDunn (07/2017 to present).** Emily serves as a paraprofessional and editorial assistant, supporting BerryDunn consultants with proofreading, editing, and other QA tasks on written material, including client deliverables.

**Martin's Point Health Care (04/2016 to 07/2017).** As a patient services representative, Emily was responsible for queue management, including phone messaging and appointment scheduling. She collaborated with the Health Information Management team to identify areas for improvement in document tracking to help close care gaps and increase Quality Measure metrics, and supported and facilitated communications related to labs, scripts, messaging to providers, etc.

**Youngclaus & Company (01/2016 to 04/2017).** As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and ensured accurate electronic filing of both client and account documents in company database per standard work flow. She performed quality review of documents after scanning to ensure accuracy and completeness of the electronic file; assembled, collated, and logged tax returns for accountants; and reviewed returns to ensure figures tied, return was in order, and any attachments were included.

**Seacoast Christian School (09/2014 to 06/2015).** Emily taught English and Creative Writing, as well as researched, designed and taught creative writing curriculum; adapted lesson plans to achieve educational objectives both short-term and long-term; demonstrated classroom management skills while inspiring students to succeed in learning; proficiency in schedule management. She also acted as Class Advisor to senior class, which involved organized fund-raising events and the senior trip.



**Civil Consultants (09/1999 to 07/2014).** As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing and proofreading proposals, project submittals, and correspondence to clients and governmental agencies; printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

**Gene Paltrineri Photography (04/1998 to 12/2003).** Emily served as a second photographer at weddings, capturing events from a photojournalistic perspective; attended seminars; trained in formal portraiture; developed black and white prints. She also had basic office management responsibilities, including overseeing each wedding project from start to finish.

**Foster's Daily Democrat (04/1996 to 08/1999).** As a newspaper copy editor and graphic artist, Emily worked on the news desk editing reporters' stories for syntax, grammar, style, and content.





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**Jordan Ramsey**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Editor (employed with BerryDunn since 06/2018)
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	MA, English: Professional Writing, Southeastern Missouri State University BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

**Overview**

Jordan is an editor and proofreader in BerryDunn's Government Consulting Group and a member of the Editorial/QA team. He provides document QA and editing for BerryDunn client deliverables and marketing/communications documents.

**Relevant Experience**

**BerryDunn (06/2018 to present).** Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other QA tasks for various types of documents, including client deliverables and marketing/communications content. He also assists in providing new-hire orientation to BerryDunn employees to help them understand the Editorial/QA Department's review process and firm style guidelines.

**Portland Adult Education (2019).** Jordan delivered writing instruction to international students and taught Level 100 and 200 English courses. In addition, he was responsible for assessments and level placement for students.

**Pearson Smarthinking Writing Lab (2017).** Jordan revised and edited a variety of essays, working under strict deadlines and providing personalized feedback to help students strengthen their technical writing, creative writing, career writing, and English-as-a-Second Language skills.

**Southeast Missouri State University (2015 to 2017).** As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

As publications assistant, Jordan proofread and edited copy for campus-wide publications and wrote copy for advertising documents.



**The Southern Illinoisan (2014 to 2015).** As copy editor, proofreader, and sports clerk, Jordan wrote and edited articles and prepared them for publications. In addition, he wrote headlines and subheads for articles and reviewed content to help ensure it was published error-free.

**Other Teaching Experience (2006 to 2010).** Lanier Technical College: As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

Hardin County, IL: Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

NOVA Group of Japan: Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



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**Jonathan Williams**

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<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff (employed part-time with BerryDunn since 02/2019)
<b>Years of Experience Relevant to Proposed Role:</b>	15 years
<b>Certifications and Education:</b>	BA, English, Bowling Green State University Member of Golden Key National Honor Society Member of Alpha Lambda Delta Honors Society

**Overview**

Jon is an experienced writer and editor, bringing 15 years of experience in proofreading and copyediting professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before being submitted to clients.

**Relevant Experience**

**BerryDunn (02/2019 to present).** Jon serves as an editor for BerryDunn's Government Consulting Group, tasked with proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

**Freelance Proofreader and Copy Editor (11/2010 to present).** Jon has worked with Ertel Publishing to proofread various niche magazines, as well as with Gypsy Publications to copy edit children's books, novels, and various other local publications.

**Midwest Tape (11/2004 to present).** Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog ([www.mwtnewsandviews.com](http://www.mwtnewsandviews.com)), social media, and other projects.

**Mitchell Equipment Corporation (02/2002 to 11/2004).** First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly, met with current and potential vendors. Schedule service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

**Spring Hill Nurseries (02/2001 to 06/2001).** Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spell, as well as wrote copy for planning guides included with shipments.



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**Mary Corley**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Proposal Writer (employed with BerryDunn since 09/2019)
<b>Years of Experience Relevant to Proposed Role:</b>	30+ years
<b>Certifications and Education:</b>	BA, Communication, University of Wyoming BS, Finance, University of Wyoming

**Overview**

Mary is a proposal coordinator with more than 30 years of document experience. Highlights of her expertise include analyzing RFPs from a legal and requirements viewpoint to help ensure the RFP is a good fit, managing all aspects of the proposal response, preparing templates and outlines for documents, gathering written responses from team members and compiling into one document, and researching and writing responses to requirements. In addition, she brings experience in formatting, styling, and editing documents.

**Relevant Experience**

**BerryDunn (09/2019 to present).** Mary serves as the lead proposal writer for BerryDunn's Medicaid Practice Area. In addition, she supports the firm's Editorial/QA team in reviewing, formatting, and copyediting documents.

**WIPRO Infocrossing (12/1989 to 09/2019).**

- **Proposal Coordinator (04/2015 to 09/2019).** Mary managed all aspects of the proposal process. She reviewed government healthcare potential RFPs for legal and business requirement fit; prepared proposal templates, outlines, cover art, and labels; worked with SMEs, legal, management and writers on proposal requirements and response, ensuring all submission requirements were met; wrote original proposal content and revise developed content to fit RFP requirements; formatted and prepared the final proposal response; and created a proposal response database.
- **Contract Compliance (07/2008 to 03/2015).** Mary gathered and reported all Service Level Agreements for contract with the State of Missouri and posted to a Cognos dashboard each month. She also acted as point of contact for questions on the contract between WIPRO and the State of Missouri; gathered systems statistics (metrics) from various sources (e.g., datacenter, Lotus Notes databases, MMIS reports) and compiled the metrics utilizing Microsoft Access and Excel in spreadsheets and charts for review by internal management; and maintained ER Studio data models. In addition, Mary performed time administrator duties, including ensuring all time was entered weekly, adding new employees, removing terminated employees, creating reports.



- **Business Analyst (11/2004 to 03/2015).** Mary performed several duties in this role, including providing online help expertise, identifying requirements on system task requests, working with programmers to help ensure that requirements were met, and conducting system testing.
- **Provider Documentation Specialist (07/1993 to 11/2004).** Mary maintained the information base that contains the current provider, system, security and processes manuals. She helped to ensure that Missouri Medicaid manuals are current, accurate and consistent, both in content and style; and formatted and styled information and scan documents to enable viewing and printing from the Internet.
- **Document Control Supervisor (12/1989 to 06/1993).** Mary supervised a permanent staff of nine clerks and a courier and coordinated daily workflow as required by Post Office mail receipts. She maintained claim receipts inventory reports and entered and maintained batch control and provider form/label order files online.



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**Kyle Melton**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Editor (employed part-time with BerryDunn since 02/2021)
<b>Years of Experience Relevant to Proposed Role:</b>	19 years
<b>Certifications and Education:</b>	BA, History, Minor: Philosophy, University of Dayton Associate's Degree, Business Administration, Sinclair Community College

**Overview**

Kyle is an experienced proofreader with a demonstrated history of working in the marketing and advertising industry. He is skilled in page layout, fact-checking, magazines, AP Stylebook, corporate brand guidelines, and copy editing.

**Relevant Experience**

**BerryDunn (02/2021 to present).** Kyle serves as an editor for BerryDunn's Government Consulting Group, tasked with proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

**SPi Global/Tighe Publishing Services (11/2018 to present).** Kyle serves as a fact-checker for middle school science programs. He composes captions for middle/high school social studies programs, and coordinates with editorial team to ensure quality and adherence to deadlines.

**Conveo (06/2017 to present).** As a freelance contractor, Kyle fact-checks state-based Social Studies programs. He also coordinates with editorial team to ensure quality and adherence to deadlines.

**FiveHundred Degrees Studio (10/2015 to 07/2020).** As a senior proofreader, Kyle supervised reviews of advertising copy for high-profile clients, as well as internal documentation. He adhered to AP style, as well as highly detailed client guidelines, and helped to ensure high-quality content in a fast-paced, detail-oriented work environment with locations in Columbus, OH, Miami, FL, and Toronto, Ontario, Canada.

**Westchester K-12 Publishing Services (11/2017 to 2018).** As a freelance contractor, Kyle fact-checked state-based Social Studies programs. He also proofread and copyedited for international Social Studies program.

**Parts Express (2016 to 2017).** Kyle wrote technical articles for electronics warehouse magazine. He also coordinated with editor to ensure focus of stories and deadlines and delivered engaging technical writing in AP style for quarterly publication.



**SBC Advertising (10/2015 to 09/2017).** Kyle reviewed advertising copy for high-profile clients, as well as internal documentation. He adhered to AP style, as well as highly detailed client guidelines, and helped to ensure high-quality content in a fast-paced, detail-oriented work environment.

**Ertel Publishing (2014 to 2015).** Kyle reviewed copy for two national bi-monthly magazines on tight deadlines. He adhered to technical specifications and internal style guidelines, and coordinated with two editorial teams to ensure quality control.

**Dayton City Paper (2010 to 2014).** As the editor, Kyle directed editorial content for arts/culture alt weekly in the Greater Dayton, OH region. He managed external media contacts to coordinate interviews/images for the weekly edition, and coordinated with the Publisher and Art Director on weekly edition content and layout.

From 2010 to 2012, Kyle also served as the first Music Editor for this publication, based on expertise in the field.

**Cengage Learning-Contemporary Musicians (2010 to 2012).** Kyle created career biographies for secondary level students on current musical artists. This included synthesizing secondary source material into narrative and coordinating with his advisor to meet deadlines.

**Mazer Corporation (2002 to 2007).** Kyle edited K-12 education materials for state and national programs in Social Studies, English and Technology. He coordinated with external writers to make revisions and meet strict deadlines, and fact-checked primary and secondary source materials.



## Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	<ul style="list-style-type: none"><li>Monthly status update on the BMS and WVCHIP Mental Health Parity and Behavioral Health Support</li></ul>
2	Decisions, Risks, and Issues Log	<ul style="list-style-type: none"><li>Register of project decisions, risks, and issues on MS SharePoint</li></ul>
3	Project Timeline	<ul style="list-style-type: none"><li>Timeline for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project</li></ul>
4	Project Schedule	<ul style="list-style-type: none"><li>Schedule for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project</li></ul>
5	Monthly Status Report	<ul style="list-style-type: none"><li>Monthly status update</li></ul>
6	Deliverable 6: MHT and MHP Mental Health Parity Update (Medicaid and WVCHIP)	<ul style="list-style-type: none"><li>Pending approval from CMS, will include the annual Medicaid and WVCHIP update to CMS for the MHT, as well as annual Medicaid update to CMS for the MHP</li></ul>
7	Medicaid and WVCHIP Behavioral Health Research and Program Analysis	<ul style="list-style-type: none"><li>Overview of recommended best practice guidance from CMS and other states on program opportunities for behavioral health</li></ul>
8	Medicaid and WVCHIP Behavioral Health Program Development Plan	<ul style="list-style-type: none"><li>Overview of opportunities and best practices for how BMS and WVCHIP can expand their current behavioral health program strategies and practices, including defining State quality and financial imperatives, necessary stakeholder engagement activities, and suggested pathways forward for implementation</li></ul>
9	Project Closeout Summary	<ul style="list-style-type: none"><li>Inventory of all project documentation and deliverables being transferred to BMS and WVCHIP at the project close</li><li>Documentation of the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member</li></ul>







## Appendix C: Acronyms/Abbreviations

**Table 5: Acronyms/Abbreviations**

Acronym/ Abbreviation	Definition
ACA	Affordable Care Act
APD	Advance Planning Document
BA	Business Analyst
BMS	Bureau for Medical Services
CCP	Certified Change Practitioner
CFR	Code of Federal Regulations
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EDS	Enterprise Data Solution
EM	Engagement Manager
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
EVV	Electronic Visit Verification
FFP	Federal Financial Participation
Gainwell	Gainwell Technologies
GPM	General Project Manager
HBE	Health Benefit Exchange
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
IES	Integrated Eligibility Solution
JCAHO	Joint Commission on Accreditation of Healthcare Organizations
LPM	Lead Project Manager
MAAA	Member of the American Academy of Actuaries
MCMP	Medicaid Learning Center Certified Medicaid Professional



Acronym/ Abbreviation	Definition
MCO	Managed Care Organization
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MHPAEA	Mental Health Parity and Addiction Equity Act of 2008
MITA	Medicaid Information Technology Architecture
MLC	Medicaid Learning Center
MMIS	Medicaid Management Information System
MS	Microsoft
NQTL	Non-Quantitative Treatment Limit
OBC	Outcomes-Based Certification
OCM	Organizational Change Management
OD	Organization Development
PATH	People's Access to Health
PC	Project Coordinator
PCI	Payment Card Industry
PEA	Provider Enrollment Application
PERM	Payment Error Rate Measurement
PMP®	Project Management Professional®
PMSS	Project Management Support Staff
POS	Point of Sale
QA	Quality Assurance
QTL	Quantitative Treatment Limit
RFP	Request for Proposals
RFQ	Request for Quotation
SIT	System Integration Testing
SME	Subject Matter Expert
SOW	Scope of Work



Acronym/ Abbreviation	Definition
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
UAT	User Acceptance Training
WVCHIP	West Virginia Children's Health Insurance Program

## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

#### BERRY, DUNN, MCNEIL & PARKER, LLC

*\* See Attached \**

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC   Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit				

Organization Information			
<b>Business Purpose</b>	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)		
<b>Charter County</b>		<b>Control Number</b>	0
<b>Charter State</b>	ME	<b>Excess Acres</b>	
<b>At Will Term</b>	A	<b>Member Managed</b>	MBR
<b>At Will Term Years</b>		<b>Par Value</b>	
<b>Authorized Shares</b>		<b>Young Entrepreneur</b>	Not Specified

Addresses	
Type	Address
<b>Designated Office Address</b>	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Mailing Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
<b>Notice of Process Address</b>	CORPORATION SERVICE COMPANY 209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Principal Office Address</b>	2211 CONGRESS STREET

PORTLAND, ME, 04102  
USA

Type	Address
------	---------

## Officers

Type	Name/Address
Member	TAMMY P MICHAUD 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	DAVID A ERB 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	JOHN M CHANDLER 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	TIMOTHY F MASSE 2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Name/Address

## DBA

DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	
DBA Name	Description	Effective Date	Termination Date

## Annual Reports

### Filed For

2021

2020

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

Date filed



## Address

Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact
✓ Ordering	100 MIDDLE STREET	PORTLAND	ME	04101	NICOLE BECNEL
Payment	PO BOX 1100	PORTLAND	ME	04104-1100	
Payment	2211 CONGRESS STREET	PORTLAND	ME	04102	Tim Masse
Ordering	2211 CONGRESS STREET	PORTLAND	ME	04102	Tim Masse
Ordering	PO BOX 1100	PORTLAND	ME	04104-1100	Ed Daranyi

First Prev Next Last

Save [Undo](#) [Delete](#) [Insert](#) [Copy](#) [Paste](#)

Vendor/Customer : 000000100150

BERRY DUNN MCNEIL &amp; PARKER LLC

Address Type : Ordering

Division/Department :

Additional Address Info. :

Prevent New Spending :

Default Currency : USD - US Dollar

Active From : 06/01/2021

Active To :

Default Record :

Mail Returned :

Active Address : Yes

## ▼ Address Information

Address ID : AD000001  
Street 1 : 100 MIDDLE STREET  
Street 2 :  
City : PORTLAND  
State/Province : ME  
Zip/Postal Code : 04101  
DUNS :  
Extended DUNS :  
CAGE Code :

Country Phone Code : 1  
Phone : 681-313-8905  
Phone Extension :  
County :  
County Name :  
Country : US

## ► Prenote/EFT

## ► Remittance Advice

## ► Contact Information

## ► Contact Address Information

## ► Geographic Designation

## ► Change Management

[Top](#)[Modify Existing Record](#) [Add New Address](#)[Master Address](#)[Master Contacts](#)[Languages](#)[Vendor Transaction History](#)