



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: 04-25-2022

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 BMS2200000030 1	Procurement Folder:	1032851
Document Name:	Payment Error Measurement (PERM) RY 2023-Ph II	Reason for Modification:	
Document Description:	Payment Error Measurement (PERM) RY 2023-Ph II		
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 2211 CONGRESS ST PORTLAND ME 04102 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: James W Atkins Requestor Phone: (304) 356-2056 Requestor Email: james.w.atkins@wv.gov 22 FILE LOCATION _____
	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: \$2,271,450.00

ENTERED

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE: *Linda Harper* 4-27-2022
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: *Melinda Stiles* APR 28 2022
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Payment Error Measurement (PERM) Reporting Year (RY) 2023 Project-Phase II

Dates of Service 5/9/2022 - 05/31/2024

Total. \$2,271,450.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$38,700.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-05-31				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 180 Hours @ \$215 = \$38,700

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$64,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-05-31				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 240 hours @ \$270 = \$64,800

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,660,750.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-05-31				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Dawn Webb 1,000 hours @ \$175 = \$175,000
Hillary Foster Moles 3,000 hours @ \$175 = \$525,000
Emily McCoy 30 hours @ \$175 = \$5,250
Sarah Ratliff 30 hours @ \$175 = \$5,250
Jason Hargrove 30 hours @ \$175 = \$5,250
Crystal Fox 2,700 hours @ \$175 = \$472,500
Sarah Colburn 2,700 hours @ \$175 = \$472,500

Total 9,490 hours @ 175 = \$1,660,750.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$507,200.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-05-31				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Shelly Schram 1,365 hours @ \$80 = \$109,200
Megan Blount 1,365 hours @ \$80 = \$109,200
JT Smith 1,365 hours @ \$80 = \$109,200
Morgan Kreiger 1,365 hours @ \$80 = \$109,200
Caitlin Cabral 88 hours @ \$80 = \$7,040
Mary Corley 88 hours @ \$80 = \$7,040
Janine DiLorenzo 88 hours @ \$80 = \$7,040
Karla Fossett 88 hours @ \$80 = \$7,040
Carole Ann Guay 88 hours @ \$80 = \$7,040
Molly Hawkinson 88 hours @ \$80 = \$7,040
Emily Hendrickson 88 hours @ \$80 = \$7,040
Bethany Pike 88 hours @ \$80 = \$7,040
Jordan Ramsey 88 hours @ \$80 = \$7,040
Jon Williams 88 hours @ \$80 = \$7,040

Total: 6,340 Hours @ \$80 = \$507,200



April 6, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health and Human Resources, Bureau for Medical Services to provide Payment Error Rate Measurement (PERM) support services, under our contract (HHR 21*3). As stated in the PERM Reporting Year (RY) 2023 Phase II SOW document, the duration of this work is estimated to be 25 months. BerryDunn agrees to a SOW start date effective on or after May 9, 2022. The work would then conclude on May 31, 2024.

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 continue providing these important services to the State of West Virginia.

Best Regards,

A handwritten signature in black ink, appearing to read 'Eduardo G. Daranyi'.

Eduardo G. Daranyi
Principal
207-541-2244



**Staffing Plan and Scope of Work for the
West Virginia Department of Health and Human Resources (DHHR) and
Bureau for Medical Services (BMS)
Payment Error Rate Measurement (PERM) Reporting Year (RY) 2023
Project – Phase II
Prepared for CMA # HHR 21*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

Submitted on:

4/6/2022

berrydunn.com

Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources, Bureau for Medical Services Payment Error Rate Measurement Reporting Year 2023 Phase II Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health Human Resources (DHHR) and Bureau for Medical Services (BMS) with the Payment Error Rate Measurement (PERM) Reporting Year (RY) 2023 review. This SOW is henceforth referred to as the PERM RY 2023 Phase II 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 PERM RY 2023 Phase II Project.

Estimates for this SOW are based on the following assumptions:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The State leadership team will consist of Sarah Young as the BMS project sponsor, and Stuart Epling, Program Integrity Assistant Director, and Stacey Shamblin, West Virginia Children's Health Insurance Program (WVCHIP) Director, as the BMS and WVCHIP project leads.
- State staff with the required knowledge base to support the PERM RY 2023 Phase II project will attend project-related meetings. If these individuals are not available or do not participate in the error review sessions, then the project schedule, scope, and cost might be impacted.
- Multiple State vendors may be involved in gathering information, reviewing errors to determine root cause, and attending State and PERM Contractor meetings. If the vendors are unable to provide information or representatives when needed, then the project schedule, scope, and cost might be impacted.
- The State project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Eduardo Daranyi, Dawn Webb, and Hilary Foster Moles as the project manager.
- DHHR intends to utilize the PERM Implementation Advance Planning Document Update (IAPD-U) including federal financial participation (FFP) for the purposes of this SOW. The estimated cost of the services to be delivered under this SOW is \$2,271,450. On

January 12, 2022, the Centers for Medicare & Medicaid Services (CMS) approved West Virginia's PERM APD request of \$3,144,714. Therefore, any additional scope that is added to the services to be provided under this SOW might require that the State update its IAPD to allocate additional funds.

- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 25 months.

2.0 Project Scope and Staffing Plan

Table 1 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 completion of each key task. A high-level timeline for the activities described below is provided in Section 5.0.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</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 project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon signature acceptance of the Deliverable 10: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn's estimate assumes 19 hours per month for 25 months.</p>	Eduardo Daranyi Nicole Becnel	475
2.0	<p>Project Execution and Control</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 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"> Facilitating meetings, preparing meeting 	Dawn Webb Hilary Foster Moles Crystal Fox Sarah Colburn Shelly Schram Megan Blount Joseph T. (JT) Smith	7,776

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>materials, and taking notes for BerryDunn- and State-owned meetings</p> <ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Schedule <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon successful completion of the project and signature acceptance of Deliverable 10: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn's estimate assumes 311 hours per month for 25 months.</p>	<p>Morgan Krieger Caitlin Cabral Mary Corley Janine DiLorenzo Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Bethany Pike Jordan Ramsey Jon Williams</p>	
3.0	<p>PERM Data Assembly and Validation Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will support the State with assembly and validation of claims data received from the Medicaid Management Information System (MMIS) vendor.</p> <ul style="list-style-type: none"> Support BMS during CMS- and PERM contractor-hosted meetings Coordinate communications with CMS, MMIS vendor, BMS, and WVCHIP stakeholders Review data to help ensure completeness and accuracy Process feedback and additional requests from CMS or PERM contractors <p><i>Completion Criteria</i></p> <p>All parties will deem PERM Data Assembly and Validation Support complete upon successful completion of the project and signature acceptance of Deliverable 10: Project Closeout Summary by the</p>	<p>Dawn Webb Hilary Foster Moles Crystal Fox Sarah Colburn Shelly Schram Megan Blount</p>	2,899

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	DHHR project sponsor or his/her designee. BerryDunn's estimate assumes 115 hours per month for 25 months.		
4.0	<p>PERM Error Validation and Remediation</p> <p><i>Service Approach</i></p> <p>BerryDunn will review errors reported throughout the PERM RY 2023 cycle, and work with BMS stakeholders to validate the accuracy of the errors, help identify the potential root cause of each error, and provide recommendations to BMS to remediate incorrect error citations with the RC and the ERC.</p> <p>As part of the PERM Error Validation and Remediation review, BerryDunn will:</p> <ul style="list-style-type: none"> Review reach error/technical deficiency identified and all associated medical record, data processing, or eligibility determination data Help validate the root cause of each error Evaluate PERM-related MMIS reports Evaluate Medicaid and WVCHIP provider and eligibility determination manuals for policy related errors Help determine the corrective action to remedy the errors <p>BerryDunn estimates the PERM Error Validation review sessions will require two 2-hour meetings with BMS-designated personnel and necessary vendor stakeholders each week during the PERM review period.</p> <p>BerryDunn will integrate validated findings into a PERM Error Validation Report. BerryDunn will then present the report to BMS-identified staff and use this report as a basis for tracking progress against requested eligibility, MMIS, policy and provider updates.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D04: Medicaid Corrective Action Plan D05: CHIP Corrective Action Plan D06: PERM Error Validation and Remediation Report 	<p>Dawn Webb Hilary Foster Moles Crystal Fox Sarah Colburn Shelly Schram Megan Blount</p>	3,606

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Completion Criteria</p> <p>All parties will deem PERM Error Validation and Remediation complete upon successful completion of the project and signature acceptance of Deliverable 04: Medicaid Corrective Action Plan; Deliverable 05: CHIP Corrective Action Plan; and Deliverable 06: PERM Error Validation and Remediation Report by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn's estimate assumes 144 hours per month for 25 months.</p>		
5.0	<p>Standard Operating Procedures</p> <p>Service Approach</p> <p>BerryDunn will support BMS with PERM Standard Operating Procedures updates.</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> D07: PERM Standard Operating Procedures <p>Completion Criteria</p> <p>All parties will deem PERM Standard Operating Procedures complete upon successful completion of the project and signature acceptance of Deliverable 07: PERM Standard Operating Procedures by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn's estimate assumes two hours per month for 25 months.</p>	<p>Dawn Webb Hilary Foster Moles Crystal Fox Sarah Colburn Shelly Schram Megan Blount</p>	50
6.0	<p>Medicaid Eligibility Quality Control (MEQC) Support</p> <p>Service Approach</p> <p>BerryDunn will support the MEQC activities required by the State during the off years of the RY 2023 PERM review cycle. As part of the MEQC activities, BerryDunn will:</p> <ul style="list-style-type: none"> Work with Quality Control (QC) stakeholder to prepare the MEQC Planning Document for delivery to CMS Manage project logs (action items, risks, issues, and decisions) Provide meeting facilitation, preparation of meeting materials, and notetaking for BerryDunn and State-owned meetings (as requested) 	<p>Dawn Webb Hilary Foster Moles Crystal Fox Sarah Colburn Shelly Schram Megan Blount</p>	1,272

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Participate in system contractor and CMS status meetings as needed Assist QC in the sampling of paid claims and conducting the quality control measures of the chosen sample, as required by CMS Review each error/deficiency and all associated claims or eligibility determination data Identify the root cause of each error Evaluate Medicaid and CHIP eligibility determination manuals for policy-related errors and make recommendations for updated policy clarifications Provide updates to the MEQC section of the Standard Operating Procedures Assist QC with a complete payment review of cases that contain a payment error, as required by CMS Make recommendations to QC on remediation plans for each validated error <p>BerryDunn estimates needing monthly two-hour meetings with QC-designated personnel during the early phases of the MEQC requirements, approximately July 2022 – December 2022.</p> <p>BerryDunn estimates needing biweekly two-hour meetings with QC-designated personnel during the remainder of the MEQC required activities (all review-related activities through the final Case Level Report on Findings and MEQC CAP Error Report submission).</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D08: MEQC Planning Document for submission to CMS <p><i>Completion Criteria</i></p> <p>All parties will deem MEQC Support complete upon successful completion of the project and signature acceptance of Deliverable 08: MEQC Planning Document for submission to CMS by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn's estimate assumes 50 hours per month for</p>		

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	25 months.		
7.0	<p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of APD updates to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D09: PERM IAPD <p><i>Completion Criteria</i></p> <p>The APD support will be completed upon submission of IAPD-U's and signature acceptance of Deliverable 10: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p> <p>BerryDunn assumes no more than three IAPD-U submissions would be needed in this 25-month period.</p>	<p>Dawn Webb</p> <p>Emily McCoy</p> <p>Hilary Foster</p> <p>Moles</p> <p>Sarah Ratliff</p> <p>Jason Hargrove</p>	90
8.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to BMS at project close. Additionally, the 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.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D10: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts and signs the Deliverable 10: Project Closeout Summary.</p> <p>BerryDunn's estimate assumes three hours per month for 25 months.</p>	<p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Dawn Webb</p> <p>Hilary Foster</p> <p>Moles</p> <p>Megan Blount</p>	82
Total Hours			16,250
Total Not-To-Exceed Cost Estimate			\$2,271,450

3.0 Project Resources and Hours

Table 2 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 # HHR 21*03.

Table 2: Project Resources

CL Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	240	\$64,800
1	LPM	\$215	Eduardo Daranyi	180	\$38,700
4	GPM	\$175	Dawn Webb	1,000	\$175,000
4	GPM	\$175	Hilary Foster Moles	3,000	\$525,000
4	GPM	\$175	Emily McCoy	30	\$5,250
4	GPM	\$175	Sarah Ratliff	30	\$5,250
4	GPM	\$175	Jason Hargrove	30	\$5,250
4	GPM	\$175	Crystal Fox	2,700	\$472,500
4	GPM	\$175	Sarah Colburn	2,700	\$472,500
5	SS	\$80	Shelly Schram	1,365	\$109,200
5	SS	\$80	Megan Blount	1,365	\$109,200
5	SS	\$80	JT Smith	1,365	\$109,200
5	SS	\$80	Morgan Kreiger	1,365	\$109,200
5	SS	\$80	Caitlin Cabral	88	\$7,040
5	SS	\$80	Mary Corley	88	\$7,040
5	SS	\$80	Janine DiLorenzo	88	\$7,040
5	SS	\$80	Karla Fossett	88	\$7,040
5	SS	\$80	Carole Ann Guay	88	\$7,040
5	SS	\$80	Molly Hawkinson	88	\$7,040
5	SS	\$80	Emily Hendrickson	88	\$7,040
5	SS	\$80	Bethany Pike	88	\$7,040
5	SS	\$80	Jordan Ramsey	88	\$7,040
5	SS	\$80	Jon Williams	88	\$7,040



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Year 1					
			Totals:	16,250	\$2,271,450

EM = Engagement Manager

LPM = Lead Project Manager

GPM = General Project Manager

SS = Support Staff

4.0 Project Hours and Costs per Month

Table 3 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	9	7	379	253	648	\$90,500
Month 2	9	7	379	253	648	\$90,500
Month 3	9	7	379	253	648	\$90,500
Month 4	9	7	379	253	648	\$90,500
Month 5	10	7	379	253	649	\$90,770
Month 6	10	7	380	253	650	\$90,945
Month 7	10	7	380	253	650	\$90,945
Month 8	10	7	380	253	650	\$90,945
Month 9	10	7	380	253	650	\$90,945
Month 10	10	8	380	254	652	\$91,240
Month 11	10	8	380	254	652	\$91,240
Month 12	10	8	380	254	652	\$91,240
Month 13	10	8	380	254	652	\$91,240
Month 14	10	8	380	254	652	\$91,240
Month 15	10	7	380	254	651	\$91,025
Month 16	10	7	380	254	651	\$91,025
Month 17	10	7	380	254	651	\$91,025
Month 18	10	7	380	254	651	\$91,025
Month 19	10	7	380	254	651	\$91,025
Month 20	9	7	380	254	650	\$90,755
Month 21	9	7	379	254	649	\$90,580
Month 22	9	7	379	254	649	\$90,580
Month 23	9	7	379	254	649	\$90,580
Month 24	9	7	379	254	649	\$90,580

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 25	9	7	379	253	648	\$90,500
Total	240	180	9,490	6,340	16,250	2,271,450

5.0 High-Level Timeline

Figure 1 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	13	14	15	16	17	18	19	20	21	22	23	24	25
1.0 Engagement Oversight																									
2.0 Project Initiation, Execution, and Control																									
3.0 PERM Data Assembly and Validation Support																									
4.0 PERM Error Validation and Remediation																									
5.0 SOP																									
6.0 MEQC Support																									
7.0 APD Support																									
8.0 Project Closeout																									



BerryDunn Authorized Signature

As a principal of this firm in our Government 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 a 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.

April 6, 2022

Signature

Date

DHHR Approval and Authorization

Approval of Scope of Work, Approach, Schedule, Staffing, Completion Criteria, and Not-to-Exceed Cost

**Sarah
Young**

Digitally signed by: Sarah Young
DN: CN = Sarah Young email =
sarah.k.young@wv.gov C = AD
O = Bureau for Medical Services
OU = Deputy Commissioner
Date: 2022.04.21 13:29:02 -
05:00

Signature

Date

Appendix A: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal with BerryDunn since 06/2010
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, Speech and Hearing Science, University of South Florida Certified Project Management Professional Executive Coaching Certification®

Overview

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 20 years of experience in Health and Human Services project management 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 Lead 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 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 (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 health care 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 (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, 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 (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** 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

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:	20 years
Certifications and Education:	<p>Master of Education, Lesley College</p> <p>BS, Physics, Mathematics, and Business Administration, Hillsdale College</p> <p>Certified Project Management Professional®</p> <p>Systems Engineering Development Program, Electronic Data Systems</p>

Overview

Ed is a principal at BerryDunn with 20 years of experience managing and providing quality assurance (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 quality assurance 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 Conference (MESC) 2014, 8/19/2014

Dawn Webb, BSHL, CPC, COC

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since 08/2017)
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	<p>BS, Healthcare Leadership, Wheeling Jesuit University Associate in Applied Science, Office Administration, West Virginia University</p> <p>Certified Professional Coder, American Academy of Professional Coders</p> <p>Certified Outpatient Coder, American Academy of Professional Coders</p> <p>Certificate of Proficiency in Obstetrics/Gynecology Coding, American Academy of Professional Coders</p> <p>Certified Compliance Professional, Healthcare Fraud & Abuse Institute</p> <p>Certificate of Proficiency in Surgery Coding, American Academy of Professional Coders</p> <p>Certificate of Proficiency in Internal Medicine Coding, American Academy of Professional Coders</p>

Overview

Dawn is a manager in BerryDunn's Medicaid Practice Area, with extensive experience in Medicaid billing, state Medicaid programs, worker's compensation claims, and rural health centers. She is a Certified Professional Coder and a Certified Outpatient Coder. Her experience includes working with clients on projects involving compliance guidelines, electronic health record (EHR) system implementations, QA, Health Insurance Portability and Accountability Act (HIPAA) policy, International Statistical Classification of Diseases and Related Health Problems-10 (ICD-10) coding, and patient management and claim editing system implementations.

Relevant Experience

BerryDunn (08/2017 to present). Dawn works with state Medicaid agency clients, currently serving on the project team based in Charleston, West Virginia.

- **West Virginia Bureau for Medical Services (BMS).**
 - *Enterprise Project Management Office (EPMO) (05/2019 to present).*
As quality improvement initiatives program manager, Dawn is providing project support in the areas of process improvement, best practices, and staffing

allocations for the Fee Schedule and Edit Quality Review, Payment Error Rate Measurement (PERM), and Third-Party Liability Procurement projects.

- *Advanced Planning Document Assistance (05/2018 to present).*
Dawn currently assists with the implementation and update of Advanced Planning Documents (APD) to support BMS in securing funding for projects. She provides assistance and oversight in compiling information for the APD, writing the APD, and developing the Medicaid Detail Budget Tables (MDBTs).
- *Payment Error Rate Measurement (PERM) Project (05/2018 to present).*
Dawn is serving as the project manager for the PERM project, managing budgets and project deliverables and working closely with the client to ensure requirements and expectation are met fully. This project includes validating errors, research error remedies, and providing oversight for resolution of PERM errors cited for WV.
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to present).*
Dawn serves first as project subject matter expert (SME) and then as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and to provide analysis of cost savings opportunities for BMS.

Valley Health Systems, Inc. (12/2009 to 07/2017). Dawn served as a manager responsible for revenue cycle administration and billing.

Unisys (06/2004 to 11/2009). As a domain services analyst, Dawn served as the configuration team leader and a medical coder for the West Virginia Medicaid line of business.

Charleston Area Medical Center (08/2004 to 09/2004). As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department.

West Virginia University (WVU) Physicians of Charleston (06/2001 to 06/2004). While with WVU, Dawn worked as a senior billing specialist and a billing manager, serving the Department of Internal Medicine and the Department of Obstetrics and Gynecology.

University Health Associates (09/1996 to 07/2001). Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

Garnet Career Center (02/1999 to 01/2000). Dawn worked as a medical coding instructor for the career center.

Acordia National (12/1994 to 05/1996). Dawn began her career as a claims examiner.

Professional Affiliations

American Academy of Professional Coders, Local Chapter Secretary, 1999

Office Managers Association of Healthcare Providers, Vice President of Publicity, 2001

Hilary Foster Moles, BSN

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since 04/2019)
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	BSN, West Virginia Institute of Technology MLC Certified Medicaid Professional (MCMP-II)

Overview

Hilary, a registered nurse, is a consultant in BerryDunn's Government Consulting Group with comprehensive clinical and state agency policy development and analysis experience. She brings expertise in case management, Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) claims processing. Hilary has supported projects in a range of roles such as subject matter expert (SME), business analyst, and project coordinator. She brings additional value to projects through her active involvement in the West Virginia Future of Nursing Action Coalition.

Relevant Experience

BerryDunn (04/2019 to present)

Hilary serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia BMS on project management initiatives.

- **West Virginia Bureau for Medical Services (BMS)**
 - *State Plan Review and Support (SPRS) Project (09/2020 to present).*
As a business analyst, Hilary is working with the project team to analyze the West Virginia Medicaid State Plan and assist the State to make process and document improvements for long-term policy compliance and sustainability.
 - *COVID-19 Emergency Services Sub-Project (03/2020 to present).*
Hilary is supporting the project with tracking of federal waivers, WV Disaster Relief State Plan Amendments (SPAs) and other COVID-19 related legislative policy changes. Previously in the project, Hilary researched and advised the client of other state policy implementations on a daily basis. She attended weekly Centers for Medicare and Medicaid (CMS) stakeholder calls and advised the client of noteworthy changes to help them stay current with the evolving changes during the public health emergency.
 - *Payment Error Rate Measurement (PERM) Project (04/2019 to present).*
Hilary is serving as a project SME for the PERM project. She has been focusing on validating medical record errors, researching error remedies and providing

recommendations for resolution of PERM errors cited for West Virginia. Hilary also supports the Medicaid Eligibility Quality Control (MEQC) sub-project.

- **MMIS Contract Edit Review (04/2019 to present).**
Hilary is serving as a project SME. She has been reviewing the current BMS prior authorization requirements and conducting an analysis to help ensure the MMIS configuration and the utilization management contractor (UMC) requirements comply. Additionally, Hilary is assisting with the analysis of telehealth policies to identify opportunities and help broaden Medicaid telehealth coverage for West Virginia. She has collaborated with BMS and DXC Technology to evaluate claim edits to help ensure the MMIS setup and current processes comply with Medicaid policy and national standards.

Kepro (09/2015 to present). As the care coordinator lead and case manager, Hilary is assisting in the development of local medical policies for West Virginia Medicaid. She conducts training sessions for colleagues, providers, and physicians; provides case management to West Virginia Medicaid members; and utilizes InterQual and BMS criteria to determine medical necessity. Disciplines include hospice, home health, rehabilitation, and durable medical equipment.

West Virginia Medical Institute (02/2013 to 08/2015). As a utilization review nurse, Hilary used InterQual and BMS criteria to determine medical necessity. Disciplines included acute care, imaging, hospice, and home health.

Charleston Area Medical Center (06/2009 to 02/2013). With Charleston Area Medical Center, Hilary served as a nurse on the Labor and Delivery unit and the Surgical Intensive Care Unit, and as a level-II clinical nurse.

Emily E. McCoy, RN, BSN, PMP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager with BerryDunn since 09/2017
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BS, Nursing, Marshall University Registered Nurse Certified Project Management Professional

Overview

Emily is an experienced project manager and registered nurse with deep expertise in healthcare consulting including mental health, long-term care, and Medicaid / MMIS. Her clinical experience includes direct care nursing for individuals within an inpatient behavioral health environment (including substance use and eating disorders), neurology unit, and skilled nursing / long term care setting. Emily also has several years of program management, project management, and leadership for both hospitals and state health and human services agencies.

Relevant Experience

BerryDunn (09/2017 to present). Emily works in BerryDunn's Medicaid consulting practice, bringing her years of experience to state Medicaid agency clients, particularly in the area of certification.

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *Eligibility and Enrollment Implementation Assistance (01/2018 to present).*
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily is able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
 - *Portfolio Coordination and Management (PCM) (11/2020 to 10/31/2021).*
Emily currently serves as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DHHR align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provides a valuable perspective and ability to help the State obtain its desired outcomes.

- **Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020).**
Emily served as the project manager for the West Virginia DHHR EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DHHR that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018).**
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA – Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 to 04/2017).**
Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

West Virginia Department of Health and Human Resources (DHHR) (11/2013 to 06/2016).
Emily served as the Director of the MMIS for West Virginia with overall duties involving the oversight and management of the MMIS and the contracted Fiscal Agent. In this role, she was responsible for managing several projects that would be integrated into the MMIS. Specific duties as the Director of MMIS included:

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement
- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.O, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)
- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements
- Participating in the development and review of the MMIS RFP

- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS
- Oversight and Management of the Adult Medicaid Quality Grant
- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

West Virginia Bureau for Medical Services (BMS) (01/2003 to 10/2013). During her 10 years with BMS, Emily held several positions, as described below.

- **Program Manager I.** Emily served as the manager of operations with the MMIS for West Virginia with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including long-term care and hospice services.
- **Program Manager II, Office of Behavioral and Alternative Health Care.** Emily served as the manager of the State Medicaid Long-Term Care Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, Pre-Admission Screening and Resident Review (PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.
- **Health & Human Resource Specialist, Office of Behavioral and Alternative Health Care.** Emily served in the State Medicaid Long-Term Care Program with overall duties involving the supervision and oversight of claims processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the Minimum Data Set (MDS), billing, and medical eligibility.

Charleston Area Medical Center (07/1996 to 12/2002).

- **Transitional Care Unit (05/1999 to 12/2002).** During her time on the Transitional Care Unit, Emily held several different positions.
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally-mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The

focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.

- **Neuroscience Unit (01/1998 to 05/1999).** As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:
 - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
 - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
 - Serving as a representative on the Standards and Practice Council and Procedures sub-committee
 - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
 - Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients
- **Behavioral Health Unit (07/1996 to 01/1998).** Emily began her nursing career on the Behavioral Health Unit, with overall duties involving the advocacy of patients while providing direct patient care to individuals with mental illness.

Sarah Ratliff

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 06/2015)
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II) MBA, University of Charleston BA, Psychology and Criminology/Investigations, West Virginia University

Overview

Sarah is a highly motivated professional with several years of organizational skills. Her experience includes project management, with analytical and team-oriented skills.

Relevant Experience

BerryDunn (05/2015 to present). Sarah works in BerryDunn's Charleston, West Virginia office, assisting with Medicaid agency clients.

- **West Virginia Bureau for Medical Services (BMS)**
 - *Enterprise Project Management Office (EPMO) Project (11/2018 to present).*
Sarah assists with project management tasks and coordination of the overall engagement. Sarah works closely with the client on staffing and project approvals, and assists with managing the tracking of all projects within the engagement.
 - *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to present).*
Sarah is currently serving as the organizational change management lead for the EVV Implementation project. Sarah works closely with the client to plan, coordinate, and facilitate bi-monthly stakeholder meetings. Sarah assists with all stakeholder correspondence and communicates with all interested parties on a regular basis.
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2017 to 08/2018).*
Sarah served as the project manager for the MITA maintenance and annual update project, managing budgets and project deliverables, and working closely with the client to ensure requirements and expectations are fully met.
 - *Provider Enrollment (PEA) Project (01/2017 to present).*

Sarah is currently serving as the project manager for the PEA project, managing budgets and project deliverables, and working closely with the client to ensure requirements and expectations are fully met.

- *Project Management of MMIS Procurement, DDI, and Certification (05/2015 to 10/2016).*

Sarah served first as a project coordinator and then as the change management lead for BMS' MMIS implementation. She worked closely with the client and vendor to ensure all processes were followed correctly and completely when requests were made. Sarah created flow charts, checklists, and other helpful documents to assist the State in adhering to and simplifying the complex processes that were to be followed.

Kanawha County Sheriff's Office (06/2013 to 05/2015). As a legal process clerk, Sarah worked to help organize and prepare official court documents for service by deputies. She also developed monthly reports to determine percentages served versus those documents returned, maintained a daily deposit and a monthly deposit roster, effectively developed answers directed to prosecutors and judges, and communicated with the public and directed them to the appropriate official.

Jason Hargrove, MBA, PMP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager with BerryDunn since 02/2018
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	MBA, Business Administration, Grantham University BS, Marine Engineering Operations, Maine Maritime Academy Certified Project Management Professional MLC Certified Medicaid Professional (MCMP-II)

Overview

Jason is an experienced leader and implementation manager, delivering IT software solutions and services in healthcare and engineering for over 19 years. Jason brings a diverse range of skills and experience including business development, finance, budgeting, contract management, team development, recruiting, resource management, and project management. He leads by example, fostering communication at all levels of the organization and is familiar with complex and difficult situations.

Relevant Experience

BerryDunn (02/2018 to present). Jason serves BerryDunn's Medicaid consulting clients as a project manager.

- **Alaska Division of Health Care Services (HCS) – MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to present)**
 Jason is the project manager for BerryDunn's team assisting HCS with visioning, researching, and developing an MMIS solicitation
- **West Virginia Bureau for Medical Services (BMS) – Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to present).**
 Jason is the project manager for BerryDunn's team assisting BMS with the implementation of their overall EVV solution, which includes support in several key areas:
 - Strategic planning
 - Organizational Change Management
 - Requirement development
 - RFP draft narratives and supporting documentation
 - Certification planning and assistance
 - APD development and updates
 - Evaluation and scoring support / facilitation
 - Vendor on-boarding

- Vendor deliverable review
- UAT planning and support

Northern New England Diagnostics 02/2017 to 08/2017). As chief of operations, Jason developed client implementation process/strategy, created detailed plans for new client onboarding and key issues, and oversaw all operational staff, internal systems, and business processes. Jason was also responsible for performing staff and operational assessments regarding quality and production, developing staff training and mentoring plans for development and quality improvement, and ensuring services met quality and cost effectiveness standards. Jason created and maintained profit and loss (P&L) financials and associated data models to assist with client valuation and forecasting.

Change Healthcare (formerly Goold Health Systems / Emdeon) (11/2005 to 02/2017). In his time at Goold Health Systems, Jason held several positions including:

- **Senior Director of Pharmacy Administration Services** – In this role, Jason continued to build relationships and further integration into the organization's centralized operations and processes. He worked closely with GM/VP on business and operational initiatives and was responsible for the oversight of 17 management and administrative positions (over 180 staff members).
- **Vice President of Administration** – Jason developed companywide initiatives to increase operational and deployment efficiencies and served as the account manager, project manager, implementation manager, or other lead roles in key projects as needed. He participated in contract negotiations, lease negotiations, and the establishment of remote offices as required. Jason also reviewed project plans and resources for companywide projects and ensured sufficient staffing levels and resources. In addition, Jason managed the business development function and staff, pursued strategic opportunities in collaboration with the CEO and business development team, and assisted with and oversaw the development of cost estimates, timelines, scope, project plans, and proposal responses.
- **Director of Administrative Services** – Jason planned, organized, assigned, directed, and evaluated the activities of the department. He also assisted the CEO in contract adherence, contract negotiations, lease negotiations, and hiring processes. He worked with the business development director in the development of cost estimates, timelines, scope, project plans, and proposal responses. Additional responsibilities included overseeing facility leases, maintenance, construction, and expansion as needed.
- **Strategic Project Manager** – In this role, Jason was responsible for the direction, coordination, and completion of assigned strategic projects. He also assisted with business development and RFP responses, developed and implemented project management tools and tracking methods, and managed administrative office and project staff members.

While at Change Healthcare, some of Jason's major projects included:

- **Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017).** Jason served in several capacities on the Ohio project including business development, project leadership and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams and coordinating on-site staff. During the project, the named Implementation Manager left the organization and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation and client relations.
- **Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016).** As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.
- **Iowa Medicaid Enterprise PBM (04/2012 to 10/2013).** Jason led the reprocurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SME's in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.
- **Utah CMS certification support (2012).** Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.
- **Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 to 10/2011).** Jason served as the Implementation Project Manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and management, meeting facilitation, risk and issue management, report management and client engagement. This project also included more intensive training of state staff and product education, change request management and issue resolution.
- **Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 to 05/2009).** As the Project Manager, Jason worked closely with internal business leads and the client

to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders and the incumbent vendor. Typical project activities included meeting facilitation, requirement, risk and action item management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client and business SMEs to successfully certify the system.

- **Maine Medicaid Mailroom and BPO (HCFA, UB, ADA) and Medical Prior Authorization.** Jason served as internal project executive to manage the conversion of an existing sole-source contract to a sub-contract and establish a new department within the company. In this role, Jason participated in negotiations with several potential prime vendor partners to develop pricing and a successful bid strategy. After source selection, he worked with a new partner to define operational processes, quality standards and technical integration. New office space and hiring was completed successfully. Jason served as the implementation lead and the business unit manager for the new and existing services as part of this project, including staff management, quality oversight, and vendor/client relations.

Ingersoll-Rand (03/1998 to 11/2005). As a mechanical engineer, Jason served as a team leader for Laboratory Operations & Reliability. In this role, he managed operations and reliability efforts through direct reports and matrixed team. He created project plans and provided daily management and guidance of both lab and engineering personnel to ensure timely completion of assigned tasks. Projects included directing company-wide reliability efforts to deal with issues relating to new product development, and working with engineering and Underwriter's Laboratory (UL) to successfully list IRs 70kW product.

Crystal Fox

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 10/2019)
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II)

Overview

Crystal, a technical engineer and systems analyst, is a senior consultant in BerryDunn's Government Consulting Group with financial system processing and requirements development and analysis experience. She brings knowledge of Medicaid Management Information System (MMIS) financial systems from a technical and business perspective from both her consulting work and her 13 years of experience working at DXC Technology, formerly Molina Healthcare. Crystal has helped clients achieve their project objectives in her roles as a subject matter expert (SME) and business analyst on MMIS operations and implementation.

Relevant Experience

BerryDunn (10/2019 to present)

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *People's Access to Help (PATH) DDI Project Management (08/2020 to present).*
Crystal serves as a project SME for the financial management and Flexi financial module reviews by providing insight on the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.
 - *Child Welfare Initiatives Project Management Services (06/2020 to 08/2020).*
Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract request for proposal (RFP) for the Bureau for Children and Families' child placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.
- **West Virginia Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement (PERM) Project (10/2019 to present).*
Crystal serves as a SME for the PERM project. She focuses on validating data processing and eligibility errors, researching error remedies, and providing recommendations for resolution of PERM errors cited for West Virginia in an effort to reduce the error rate which affects the federal match the state receives.

- **MMIS Contract Edit Review (10/2019 to present).**
Crystal serves as a project SME. She reviews documents and information compiled from policy as well as claim-related stored procedures and desk-level procedures (DLPs) to help ensure compliance with the State Medicaid Plan and State Medicaid provider manuals. Crystal also performs multi-state analysis of telehealth policies to identify opportunities for WV to expand covered services, reviews the current MMIS configuration to support the Medicaid National Correct Coding Initiative (NCCI) editing, and reviews MMIS system configuration to identify where the system does not match the current State Plan or Medicaid policy. Crystal also develops a research summary that provides the client with the findings of the review and recommendations to remediate.
- **Advanced Planning Document (APD) Assistance (06/2020 to 08/2020).**
Crystal served as a business analyst for MMIS APD development and updates by updating expenditures and budget based on the previous prior requests in an effort to calculate a request for the current and upcoming years.
- **Enterprise Program Management Office – COVID-19 Waivers and Flexibilities (03/2020 to 06/2020).**
Crystal served as a business analyst by researching the waivers and flexibilities implemented under the Coronavirus Aid, Relief, and Economic Security (CARES) Act during the public health emergency. Crystal prepared summaries or tracking documents based on the research findings, which was incorporated into presentations presented to the client by project leads.
- **Mountain Health Promise (MHP) Implementation Project Management Support (12/2019).**
Crystal served as a project SME. She supported the Operational Readiness Review (ORR) by performing secondary evidence review for the Financial Management section to help ensure that scoring, determinations, and findings were complete, accurate, and corroborated.
- **Puerto Rico Medicaid Program (PRMP) – Enterprise Objective Monitoring and Control (EOMC) Services (08/2020).**
Crystal served as a business analyst for the Medicaid Enterprise Organizational Structure (MEOS) subproject by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

DXC Technology/Molina Healthcare (MMS)/Unisys (04/2006 to 06/2019).

- **Svc Info Developer III (06/2016 to 06/2019).** Crystal translated business requirements to system functionality; developed use case elaborations and business rules using industry best practices; designed unit test cases to ensure business rules and requirements are being met; managed changes to base lined system requirements using

established project change control processes and tools; and wrote SQL queries to validate data and troubleshoot results where applicable.

- **MITA Financial Systems Analyst III (02/2011 to 06/2016).** Crystal worked with teams to analyze business processes. She designed and documented system functionality using industry standard use cases; specialized in all phases of financial processes including, but not limited to; Accounts Payable, Accounts Receivable, General Ledger, Claim Payment, 1099 Processing; and managed changes to system requirements using established project change control processes and tools to include, but not limited to Application Lifecycle Management (ALM).
- **Systems Analyst 5-Financial Analyst (04/2006 to 02/2011).** Crystal created financial reports/processing for clients. She worked closely with the client to understand the business needs and gather requirements/specifications for the project; designed and implemented enhancements/modifications for the Health PAS Financial system; performed research and analysis on testing results to ensure accuracy; and resolved production support issues for the Health PAS Financials system as needed.

Sarah Colburn

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 07/2019)
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	Graduate studies, Human Development Counseling, University of Illinois Springfield BA, Developmental Psychology, University of Illinois Springfield MLC Certified Medicaid Professional (MCMP-II)

Overview

Sarah is a committed, results-driven, detailed-oriented professional with over 20 years of experience in the areas of leadership, program development, and problem solving. She brings a superior ability to research, develop, and implement strategies that are designed to optimize goals and achieve objectives. She has a proven success record in development of systems, processes, and procedures created to streamline operations and increase efficiencies.

Relevant Experience

BerryDunn (07/2019 to present). Sarah is a senior consultant with BerryDunn's Medicaid consulting practice area.

- **West Virginia Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement (PERM) Project (10/2019 to present).*
Sarah serves as a SME for the PERM project. She focuses on validating data processing and eligibility errors, researching error remedies, and providing recommendations for resolution of PERM errors cited for West Virginia in an effort to reduce the error rate which affects the federal match the state receives.
 - *MMIS Contract Edit Review (02/2020 to present).*
Sarah serves as the project manager. She manages budgets and project deliverables, and works closely with the client to ensure requirements and expectations are fully met. In addition, she collaborates with the client and vendor to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup complies with Medicaid policy and to provide analysis of cost-savings opportunities for BMS.
 - *Provider Management Services (PMS) Project (09/2019 to present).*
Sarah is currently serving as the project manager for the PMS project, managing budgets and project deliverables, and working closely with the client to ensure requirements and expectations are fully met.

Illinois Department of Healthcare and Family Services (09/2018 to 07/2019). Sarah served as a business analyst, assisting State staff in creating policies that are consistent with requirements and mandates of federal and state administrative rules. She worked as a member of the federal compliance and certification team for the State, assisted with UAT for software upgrades to the IMPACT system, and assisted with completing review of paid claims for federal and state audit completion. She also worked investigating and documenting CMS PERM audit findings to assist the State in resolution of seemingly inappropriately paid Medicaid claiming.

Illinois Department of Human Services (10/2010 to 09/2018). As a Medicaid consultant, Sarah served as a liaison with the Department of Aging, Department of Developmental Disabilities, and Department of Healthcare and Family Services personnel to ensure compliance with federal rules and regulations. She performed claiming reject investigations, resubmission of corrected claiming data using electronic data processing, and recommendations for claiming software modifications. Sarah was the lead worker assisting the Department in review and response of Illinois Healthcare and Family Services (IHFS) financial auditing for several Federal budget periods.

CQuest America (03/2001 to 05/2009)

- **Manager, Systems Integration and Project Management (04/2008 to 05/2009).** Sarah provided oversight of new software development to increase productivity and efficiency of the central billing office. She managed timelines, distribution of duties, budgetary guidelines, and final production for all projects required by the central billing office to the meet the contractual requirements of the Illinois Early Intervention Program.
- **Manager, Central Billing Office (09/2006 to 04/2008).** In this role, Sarah managed daily operation of claims, provider enrollment, third-party reimbursement, Medicaid, and central support functions for the Illinois Early Intervention Program. She ensured that the office met all contractual and procedural requirements of the program, as mandated by the Department of Human Services, and worked to develop and implement procedural guidelines to receive maximized Medicaid matching funds.
- **Manager of Insurance Claims Processing (07/2005 to 09/2006).** Sarah had oversight of claims and Insurance unit functions for the Illinois Early Intervention Program. She established and organized an insurance unit whose primary function was to maximize private insurance benefits, and implemented trainings to educate service providers and regional office staff.
- **Claims Processing Supervisor (03/2001 to 07/2005).** Sarah's duties included payroll functions, preparation, and distribution of yearly evaluations, hiring, and preparing reports. She also assisted in the development and implementation of insurance billing policies for the Early Intervention Program.

Shelly Schram

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 01/2019
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	BBA, Computer Technology, University of Nebraska at Omaha

Overview

Shelly is a consultant in BerryDunn's Medicaid Practice Area with excellent organizational, problem-solving, and analytical skills. She brings over 10 years of working in the non-profit field providing project, analytical, and administrative skills.

Relevant Experience

BerryDunn (01/2019 to present). Shelly serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia Bureau for Medical Services on project management initiatives.

- **West Virginia Bureau for Medical Services (BMS).**
 - *West Virginia Enterprise Project Management Office (EPMO) (1/2019 to present).*
Shelly supports the WV EPMO project with business analysis, project coordination, and management tasks.
 - *West Virginia Third-Party Liability (TPL) Procurement Assistance (4/2019 to present).*
Shelly supports the TPL project with project analysis, reporting, and writing requirements for request for proposal.
 - *West Virginia Payment Error Rate Measurement (PERM) Phase II (11/2019 to present).*
Shelly supports the PERM project with project coordination, reporting, and project analysis.
 - *West Virginia People's Access to Help (PATH) (6/2020 to present).*
Shelly supports the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise.

CHI Health Foundation (08/2018 to 01/2019). As the foundation coordinator, Shelly led the coordination and management of projects, campaigns, and events from inception to successful completion. She analyzed gifts to determine appropriate campaigns, funds, and appeals for each processed gift, as well as processed daily gift batches and produced gift receipts and acknowledgement letters. Additional responsibilities included working with the National Office to

research local high-profile donors who align with the Foundation's core values, and directing aspects of the fund development database (Raiser's Edge).

Father Flanagan's Boys Home (04/2008 to 08/2018).

- *Development Project Specialist (01/2016 to 08/2018).* In this role, Shelly developed, maintained, and monitored detailed project schedules, including timelines, workflow, budgets, personnel, and resources. She researched high-profile donors via online data sources for the executive director and SVP of Development, and coordinated events hosted by National Development. During this time, Shelly also began integration of the Blackbaud Luminate Online system. For this project, she coordinated and took lead on ensuring timely completion. In addition to integration, she began the process of building online campaigns with matching appeals.
- *Training and Evaluation Data Specialist (05/2013 to 01/2016).* Shelly managed data files to help ensure accuracy and security. She summarized the results of training and evaluation activities; organized and prepared high-quality reports, graphs, and charts of departmental activities; and constructed and maintained staff evaluation and program fidelity instruments.
- *Project Support Specialist (12/2011 to 05/2013).* Shelly assisted with the migration of three databases into one newly created CRM, assisting with accurately mapping data fields and migrating 7.3 million donor records. She researched foundations, organizations, and individuals using several online databases to compile into a constituent report.
- *Data Analyst (04/2008 to 12/2011).* Shelly evaluated data collected through research, task analysis, business processes, surveys, and workshops. She updated and maintained consumer contact and other data through web-based portals and other databases; updated and maintained lists of materials, contracts, and departmental data in a central location; and utilized online systems to send and track marketing campaigns.

Megan Blount, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 04/2021
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	MBA, University of Charleston BS, Communications, West Virginia State University

Overview

Megan is a highly efficient project coordinator, experienced in scheduling, time management, written and verbal communication, and collaboration with all levels of administrators, stakeholders, and community leaders. She is comfortable performing detailed and intricate tasks with a high degree of accuracy and confidentiality within a complex environment with tight, constantly shifting deadlines.

Relevant Experience

BerryDunn (4/2021 to present).

Megan serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia Bureau for Medical Services on project management initiatives.

- **West Virginia Bureau for Medical Services (BMS).**
 - *West Virginia Third-Party Liability (TPL) Procurement Assistance (4/2021 to 3/2022).*
Megan supported the TPL project with project coordination.
 - *West Virginia Payment Error Rate Measurement (PERM) (4/2021 to present).*
Megan supports the PERM project with project coordination.
 - *Fee Schedule and Edit Quality Review (4/2021 to December 2021).*
Megan supported the Fee Schedule and Edit Quality Review project with project coordination.
- **West Virginia State Tax Department (10/2019 to present).** As a tax analyst, Megan performs research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzes data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assists in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provides meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

Thyssenkrupp Elevator (TKE) (10/2018 to 01/2019). Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

West Virginia State University (06/2013 to 10/2018)

- **Assistant Director, International Affairs (01/2016 to 10/2018).** Megan worked with both degree-seeking and non-degree seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.
- **Assistant Director, Academic Educational Outreach (04/2014 to 01/2016).** Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program, and provided support to the WVSU Prison Initiative program.
- **Executive Secretary, Academic Affairs (06/2013 to 04/2014).** Megan served as the Liaison for Academic Policies Committee, WVSU Board of Governors; managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.

Joseph T. Smith, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since June 2021
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Regent Bachelor of Arts, Marshall University Master of Business Administration, concentration in Finance, Marshall University

Overview

Joseph is an intern with BerryDunn with history in working in a team to aggregate business information to target diverse markets effectively. During his studies, he worked with the develop Case Analyses that effectively change corporate structure and provide better development strategies. His consistent and dependable skillset in strategic planning, IT support, and account management have allowed him to succeed in detail-oriented roles in a variety of office settings.

Experience

BerryDunn (June 2021 to present).

JT serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia Bureau for Medical Services on project management initiatives

Cabell-Wayne Association of the Blind (June 2019 to June 2021). Joseph worked as a website developed to develop backend and front-end for consumers and employees. He provided hands-on support for consumer events.

Frank Rivas MD (August 2018 to July 2019). Joseph worked as IT support technician to troubleshoot and fix computer errors, tech computer skills to new employees, and manage the point-of-sale system.

Cabell County Public Library (August 2017 to March 2019). Joseph worked as reference assistant to provide technological support for patrons and employees. He helped patrons with locating books and retrieving requested information from internal and external resources.

Marshall Recreation Center (May 2015 to November 2016). Joseph worked as facility manager to open facility and manage appearance standards. He supervised staff and monitored facility equipment.

Morgan Krieger

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Journalism, West Virginia University

Overview

Morgan is an experienced marketing director with strong experience in private and non-profit organizations. She is highly skilled in writing, administrative, and organizational work, and brings over 5 years' experience applying these skills to project teams.

Experience

TEKsystems (September 2021 to present).

Morgan serves as project coordinator for BerryDunn's Medicaid Practice Area, working with the West Virginia Bureau for Medical Services on project management initiatives

Shuman McCuskey Silcer (November 2019 to present). Morgan works as a marketing coordinator to develop and maintain the firm's internet presence through rebranding, web redevelopment, social media, and biographical enhancements on third-party websites. Her role requires meticulous documentation, coordination and scheduling, and she is charge of all firm public relations, including announcements, advertisements, community involvement, charitable contributions, and sponsorship on behalf of the firm and members. She identifies and arranges speaking engagements, seminars, conferences, and continuing legal education classes to help attorneys market their area of expertise and prepared visual and handout materials for these events. Morgan also conducts professional development opportunities for attorneys and develops, manages, and distributes targeted emails, quarterly electronic newsletters, client surveys, and other promotional activities for current, former, and potential clients.

Capitol Market (July 2019 to November 2019). Morgan worked as a marketing manager and project coordinator to plan and manage content, graphics, and production of marketing, fundraising, and campaign materials. She wrote and edited compelling communication materials, including internal communications with the board of directors, and external marketing documents, website, and social media, aimed at donors, volunteers, and other external audiences, which entailed heavy documentation. Morgan coordinated the annual signature event that raised \$75,000 and attracted 150 attendees, helped create, expand and/or coordinate approximately 15 events for donors and/or the general public, and managed day to day operations.

I Love Nice People, Inc. (August 2016 to January 2020). Morgan was the Co-Founder of a 501(c)3 non-profit social awareness clothing brand. She handled all documentation / coordination needs and designed a line of ethically-made trademarked apparel and accessories. She directed activities of business pertaining to production, pricing, marketing, sales, and

distribution of products while also developing and maintaining an internet presence through social media and an ecommerce shop

Charleston Area Alliance (May 2017 to January 2018). Morgan worked as a marketing and communications assistant to write and edit brochures, postcards, profiles, newsletter content, and email campaigns. She managed social networking accounts and worked with designers, printers, and other vendors to carry jobs from design to completion. Morgan also assisted with research, analysis, and planning that helped the organization to better communicate with its demographic.

Dorle Simmonds Literary Agency (January 2016 to May 2016). Morgan worked as a literary intern that communicated findings of unpublished works and authors with agents. She evaluated writer's work to determine its value for representation and insightfully selected manuscripts from unknown authors with trending concepts, popular topics, and quality writing.

Caitlin Cabral

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Employed with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Psychology, University of Hartford

Overview

Caitlin is part of the BerryDunn Editorial/QA team who has demonstrated experience in project management, administrative oversight, and organizational duties. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

Experience

BerryDunn (09/2021 to present). As a member of BerryDunn's Editorial/QA team, Caitlin is responsible for 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.

QualityMetric (August 2020 to September 2021). Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

University of Hartford's Department of Psychology (January 2019 to May 2020). Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.

True Colors, Inc. (January 2019 to May 2019). Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

University of Hartford's Department of Communication (September 2018 to May 2020). Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer

lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.

Mary Corley

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Proposal Writer (employed with BerryDunn since 09/2019)
Years of Experience Relevant to Proposed Role:	30+ years
Certifications and Education:	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 requests for proposals (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/Quality Assurance 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 on-line 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.

Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor with BerryDunn since February 2022
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Arts in Early Childhood Education, Stonehill College

Overview

Janine has more than 10 years' experience writing reports, grants, and outreach materials; designing graphics and publications; and creating communication/organizational systems in education and non-profit organizations. She has worked with educational institutes to develop skills in project management, communication, and planning.

Experience

BerryDunn (January 2022 to present). Janine is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes.

Breakwater School (August 2019 to August 2021). Janine worked as a Preschool Teacher to collaborate with co-teachers to write and implement culturally-responsive and developmentally-appropriate curriculum and assessments, emergent to children's individual interests, strengths, and needs. She wrote weekly curricular updates and quarterly developmental reports to relay children's growth and learning, and to foster home-school connections. Janine also led teaching team in developing centralized communication channels and organizational systems for unit explorations, documentation of learning, and family communications.

Community Connections of Brockton (June 2011 to June 2018).

- *Program Coordinator (June 2014 to June 2018)*
Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.
- *AmeriCorps*VISTA, Brockton's Promise Coordinator (August 2012 to August 2013)*
Janine coordinated communications and logistics among five committees in a crosssector, citywide coalition that addresses youth education, health, safety, and civic

engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and also wrote copy for website and social media outreach channels.

- ***AmeriCorps*VISTA, Brockton Parents Magazine (June 2011 to August 2011)***
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000 copy distribution via businesses, schools, municipal buildings, and social service agencies.

Stonehill College (August 2010 to May 2011). Janine worked as the Student Co-Director of Volunteerism to maintain relationships with over 30 community partners & 600 student volunteers. She designed and led trainings and reflections for the Student Service Leadership team, recruited volunteers, met community partner service needs, arranged logistics, and organized events to promote awareness of local justice issues and service opportunities. Additionally, she tracked volunteerism data for college and national Carnegie reporting.

Karla Fossett, MFA, Prosci® CCP

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Content Administrator (employed full-time with BerryDunn since 11/2012)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MFA, Creative Writing, Stonecoast MFA Program, University of Southern Maine BS, Film, Boston University College of Communication Prosci® Certified Change Practitioner

Overview

Karla provides content management, technical writing, and proposal development assistance for BerryDunn's Government Consulting Group in support of our client engagements and internal consulting operations. Through her work supporting BerryDunn client engagements, together with her prior work in training development and delivery, she has a strong foundation of knowledge and hands-on experience for providing project management support for the Bureau.

Relevant Experience

BerryDunn Government Consulting Group (11/2012 to Present). Karla serves in multiple roles for BerryDunn's Government Consulting Group, primarily in support of the New Business Development team. She serves as the senior content administrator for the firm's proposal automation software, managing a content library of 2000+ entries. She also supports the firm's Editorial/Quality Assurance team. Prior to this role, she has served as a proposal coordinator, technical writer and editor, and administrator for BerryDunn KnowledgeLink, a customized Microsoft SharePoint tool.

Delhaize America (03/2012 to 11/2012). As a documentation specialist, Karla created, revised, and maintained Standard Practice Training Aids for multiple corporate departments; graded associates' training exercises; assisted in training for the Master Network Pricing Project; and developed several corporate-wide communications.

EZAuctionNet (09/2010 to 02/2012). Karla served as a copy writer and research master. Her position entailed writing product advertisements, conducting extensive product research, and assisting with product handling and maintenance.

Carole Ann Guay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator (employed with BerryDunn since 10/2014)
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	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 Eligibility and Enrollment (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.

Molly Hawkinson

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

Overview

Molly is a senior writer and 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.

Emily Hendrickson

Proposed Project Role:	Project Management Support Services
Role at BerryDunn:	Paraprofessional (employed with BerryDunn since 07/2017)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	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 quality assurance, 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 quality assurance 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.

Bethany Pike

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator (employed full-time with BerryDunn since 07/2012)
Years of Experience Relevant to Proposed Role:	17 years

Overview

Bethany is a project coordinator in our Government Consulting Group, based in Phoenix. She has over 20 years of experience working in consulting, compliance, and financial services, serving in client-facing roles that have leveraged Bethany's exceptional organizational skills, strong attention to detail, outstanding client service, and clear written and verbal communication skills.

Relevant Experience

BerryDunn (07/2012 to present). Bethany has served in multiple roles at BerryDunn, with progressive levels of responsibility that leverage her strong organizational skills, knowledge of the firm's services and processes, and collaborative work style.

- **Project Coordinator (07/2019 to present).** Bethany works with our consulting team on engagements in the West to keep project tasks and deliverables on track, maintain our project collaboration SharePoint site (BerryDunn KnowledgeLink), perform document quality review, and assist with meetings and other on-site activities.
- **Contracts Administrator (07/2016 to 06/2019).** Bethany minimized firm risk by consistently administering subcontractor legal documentation and helping to ensure that all aspects of each contract were being fully executed, helping to ensure the firm complies with contractual and regulatory requirements. In addition, she established and executed processes to streamline legal documentation for the firm, and elevated risks as needed to firm leadership.
- **Contracts Coordinator (04/2013 to 07/2016).** Bethany established processes and strengthened workflows related to managing and maintaining subcontractor and contracts documentation, leveraging the firm's document management system and other technologies. She maintained extensive face-to-face, written, and oral communications with clients, prospects, subcontractors, and internal stakeholders.
- **Administrative Assistant (07/2012 to 04/2013).** Bethany edited, proofread, and conducted quality reviews of client deliverables and other work products developed by our Government Consulting Group. In addition, she provided support for various aspects of our consulting work.

Vigilant Capital Management (02/2011 to 05/2012). As Client Relationship Administrator, Bethany completed new account documentation and assured that assets were received in a timely fashion; processes gifts of stocks; executed bill paying and beneficiary disbursements; prepared quarterly statements and tax documentation; and maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence.

Spinnaker Trust (02/2006 to 02/2011). As Trust Operations Administrator, Bethany performed operational functions within Spinnaker Trust's accounting software; input, tracked, and processes fees; processed gifts of stocks; executed bill paying and beneficiary disbursements; administered approximately 125 IRA accounts; coordinated and gathered relevant information for 5498s and 1099Rs; processed daily operational transactions; proofed accounting transactions; and conducted cost basis research.

Maine Bank & Trust (02/1998 to 01/2006). As Trust Administrator, Bethany maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence; administered approximately 450 accounts; reviewed trust documents; completed discretionary memorandums; completed new account documentation and assurances that assets were received in a timely fashion; and executed bill paying and beneficiary disbursements.

Jordan Ramsey

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor (employed with BerryDunn since 07/2019)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	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 a senior writer/editor in BerryDunn's Government Consulting Group and team lead of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and holds a MA in English: Professional Writing.

Relevant Experience

BerryDunn (07/2019 to present). In his role as senior writer/editor, Jordan manages a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations.

Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content. He also provides new-hire orientations 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 copyeditor, 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.

Jonathan Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff (employed part-time with BerryDunn since 02/2019)
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	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), 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.

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Monthly status update
02	Monthly Status Report	Monthly status update
03	Project Schedule	The project schedule is a list of the project tasks included in the SOW, and the anticipated length of time required to complete each task.
04	Medicaid Corrective Action Plan	As part of the final phase of the PERM cycle, CMS requires a CAP to identify the most cost-effective actions that can be implemented to correct error causes. This document identifies the corrective actions to be implemented based on the State Medicaid errors identified during the RY 2023 PERM cycle.
05	CHIP Corrective Action Plan	As part of the final phase of the PERM cycle, CMS requires a CAP to identify the most cost-effective actions that can be implemented to correct error causes. This document identifies the corrective actions to be implemented based on the WVCHIP errors identified during the RY 2023 PERM cycle.
06	PERM Error Validation and Remediation Report	The PERM Error Validation Report and Remediation report provides the PERM team's final validation of errors and the PERM team's final remediation strategy for the errors.
07	PERM Standard Operating Procedures	The PERM SOP defines the PERM review process for BMS and provides information/instruction specific to BMS' role in the PERM review.
08	MEQC Planning Document	The MEQC planning document identifies the purpose of each of the MEQC-identified focus groups, as well as the process to help ensure eligibility is being determined accurately for the RY 2023 MEQC review. This review applies to both Medicaid and WVCHIP populations.
09	IAPD	The IAPD will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610. An implementation project management approach will also be submitted with this deliverable.
10	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being

Deliverable #	Deliverable Name	Deliverable Description
		transferred to BMS at the project close. The Project Closeout Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advanced Planning Document
BA	Business Analyst
BMS	Bureau for Medical Services
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
EPMO	Enterprise Project Management Office
FFP	Federal Financial Participation
IAPD-U	Advance Planning Document Update
IV&V	Independent Verification and Validation
MEQC	Medicaid Eligibility Quality Control
MESC	Medicaid Enterprise Systems Conference
MMIS	Medicaid Management Information System
PERM	Payment Error Rate Measurement
QA	Quality Assurance
RY	Reporting Year
SME	Subject Matter Expert
SOW	Statement of Work
SS	Support Staff
State	West Virginia
WVCHIP	West Virginia Children's Health Insurance Program