



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 BMS2200000031 1	Procurement Folder:	1034207
Document Name:	Medicaid Enterprise Data Solutions (EDS) Phase II Project	Reason for Modification:	
Document Description:	Medicaid Enterprise Data Solutions (EDS) Phase II Project		
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

Purchasing Division's file copy

Total Order Amount: \$1,270,330.00

ENTERED

CH 5/12/22
PURCHASING DIVISION AUTHORIZATION
DATE: *Lunda Harper* 5/16/22
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: *Beverly Toke* 5-16-22
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid Enterprise Data Solution Implementation and the Centers for Medicare& Medicaid Services Certification Phase II Project

Dates of Service 5/9/2022 - 09/30/2022

Total. \$1,270,330.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$12,470.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2022-09-30				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 58 Hours @215 = \$12,470

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$8,910.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2022-09-30				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 33 hours @ \$270 = \$8,910

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$956,550.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2022-09-30				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Peter Alfrey 100 hours @ \$175 = \$17,500
 Ryan Wrisley 662 hours @ \$175 = \$115,850
 Rachel Moss Capper 615 Hours @ \$175 = \$107,625
 Meghann Slaven 624 hours @ \$175 = \$109,200
 Buffy Cranford 665 hours @ \$175 = \$116,375
 Jim Strassenburgh 625 hours @ \$175 = \$109,375
 Tanveer Khan 635 hours @ \$175 = \$111,125
 Cynthia Taylor 725 hours @ \$175 = \$126,875
 Dorothy Ball 200 hours @ \$175 = \$35,000
 Chris Davis 70 hours @ \$175 = \$12,250
 Dawn Web 120 hours @ \$175 = \$21,000
 Mo Maitland 425 hours @ \$175 = \$74,375

Total 5,466 hours @ 175 = \$956,550.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$292,400.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2022-09-30				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Shelly Schram 320 hours @ \$80 = \$25,600
 Meghan Crown 448 hours @ \$80 = \$35,840
 Sarah Vintorini 447 hours @ \$80 = \$35,760
 JT Smith 505 hours @ \$80 = \$40,400
 Caitlin Poling 558 hours @ \$80 = \$44,640
 Jonathan Watkins 560 hours @ \$80 = \$44,800
 Melinda Trail 557 hours @ \$80 = \$44,560
 Jordan Ramsey 260 hours @ \$80 = \$20,800

Total: 3,655 hours @ \$80 = \$292,400



March 14, 2022

To Whom It May Concern:

In order to continue providing support for the duration of the Medicaid Enterprise Data Solution (EDS) implementation, BerryDunn submitted a Phase II Staffing Plan and Scope of Work (SOW) for Phase II of the EDS Project. The EDS Project Phase II SOW includes a continuation of project management services, implementation support, and the Centers for Medicare & Medicaid Services (CMS) certification support for the new EDS.

The services outlined in the EDS Project Phase II SOW are in accordance with the terms and conditions of the Certified Master Agreement (CMA) Number HHR21*03 Bureau for Medical Services (BMS) Project Management Services contract between BerryDunn and West Virginia Department of Health and Human Resources (DHHR). As stated in the SOW document, the duration of this work is estimated to be five months with a start date of May 9, 2022 and a September 30, 2022 end date.

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 provide 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 and
Bureau for Medical Services
Medicaid Enterprise Data Solution Implementation and the Centers for
Medicare & Medicaid Services Certification Project Phase II
(EDS Project Phase II)
Prepared for CMA #HHR21*03**



Submitted by:

Nicole Becnel, PMP®, Principal
Eduardo Daranyi, PMP®, Principal
Ryan Wrisley, PMP®, Manager
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207.541.2244
edaranyi@berrydunn.com
nbecnel@berrydunn.com

Submitted on:

March 14, 2022

berrydunn.com



Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources (DHHR), Bureau for Medical Services (BMS) Medicaid Enterprise Data Solution (EDS) Implementation and the Centers for Medicare & Medicaid Services (CMS) Certification Project (EDS Project Phase II)

The State of West Virginia (State) Department of Health and Human Resources (DHHR) requested that BerryDunn provide continued project management (PM) support for the implementation of the new Enterprise Data Solution (EDS), including facilitation of data governance activities and Centers for Medicare & Medicaid Services (CMS) certification support for the West Virginia Medicaid EDS Project Phase II. This work will be completed in accordance with the terms and conditions of the Certified Master Agreement (CMA) Number HHR21*03 Bureau for Medical Services (BMS) Project Management Services contract between BerryDunn and West Virginia DHHR.

1.0 Key Information

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Scope of Work (SOW). BerryDunn considered the following information in preparing this SOW.

1.1 General

Between October 2017 and October 2019, the State engaged BerryDunn to conduct research, visioning, and procurement activities for a new and modernized Medicaid EDS to replace the existing Data Warehouse/Decision Support System (DW/DSS). The EDS will primarily support BMS-administered programs. In addition, the modernized EDS has the potential to support all DHHR bureaus and offices, inclusive of each respective DHHR program and administrative function. Additionally, DHHR intends for the EDS to supply the State with a greater range of analytical capabilities beyond standard reporting of aggregated data currently contained within the existing DW/DSS. DHHR anticipates meeting the vision for the EDS by integrating external data sources (e.g., immunization, eligibility, and public health records) into the Medicaid data warehouse and by supplying more advanced analytical tools to detect fraud and abuse and measure health outcomes. The vision for the EDS is to create and maintain a useful, objective, and comprehensive solution that can be used to promote better care, better health, and lower costs for West Virginians. On March 23, 2021, DHHR announced a contract award to IBM® for



design, development, implementation (DDI) and operation of the EDS. The contract start date was April 2, 2021.

In December 2021, IBM® announced the 14-month DDI timeline would exceed 14 months due to changes required to incorporate the National Provider Index (NPI) into the EDS design. Due to the EDS implementation extending beyond the 14-month timeline, the State requested continued PM services support from BerryDunn as outlined within this SOW.

The objective of Phase II of the EDS Project is to continue PM support throughout the implementation of the new EDS. In addition, this project's scope includes services to support formal CMS certification and federal reviews. This SOW will support the following activities:

- Continue PM support services throughout the implementation of the EDS
- Continue providing data governance framework support, including, co-chairing the Data Governance Committee (DGC) and facilitating meetings with the DGC and Data Stewards Team
- Continue providing assistance to the State to support requirements management, vendor deliverable management, vendor and vendor contract management, and testing
- Continue providing support to the State to obtain formal CMS certification and facilitation of the federal review process
- Provide DDI validation support to the State post-go-live to help ensure full stability of the EDS

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The cost of services and timeline in this SOW assumes services are scoped to occur across five months. The level of effort defined within this SOW is a point-in-time estimate that may require updates subsequent to the delivery or re-baseline(s) of the vendor-supplied project schedule.
- Schedule delays that result from the action or inaction of federal, State, and vendor stakeholders may impact the overall project schedule and require change requests in



order to help ensure BerryDunn's PM services continue for the duration of the EDS implementation.

- The State leadership team will consist of Shaun Charles, Brandon Lewis, and Sarah Young as the project sponsors.
- The State project lead(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.
- Deliverables will be provided in an agreed-upon format.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State SharePoint site and will be brought to the attention of the project sponsors.
- State staff and relevant stakeholders from bureaus and agencies will make themselves available for pertinent EDS implementation activities. If these individuals or others are not available or do not participate in the sessions, the project schedule, scope, and cost may be impacted.
- This SOW assumes prompt review and input from the Department of Purchasing. Any delays in review of contract documents may impact the overall timeline for the work that BerryDunn will complete under this contract.
- The BerryDunn leadership team will consist of Ryan Wrisley, Rachel Moss Capper, and Meghann Slaven as the project leads.
- The level of effort defined within this SOW assumes BerryDunn will not be responsible for the development and/or maintenance of documentation to support the DGC, EDS implementation, and/or EDS maintenance and operations outside those documents detailed within this SOW. In the event that DHHR requests assistance developing and/or maintaining documents outside of those within this SOW, those documents will be subject to review and approval by the DHHR project sponsor and BerryDunn.



- The level of effort specific to Vendor Management and Contract Management Services is limited to the solutions implementation and operations period through the close of this SOW.
- The level of effort defined within this SOW may be impacted by any delay and/or project issue that arises as a result of vendor performance.
- The cost of the services described in this SOW is included in the latest I-APD submitted to the federal partners with an estimated cost of \$6,388,645 (\$579,781 FFP/\$638,865 State) for PM services through FFY 2022. The estimated cost for BerryDunn's services under this SOW is \$1,270,330. The IAPD-U was approved on November 30, 2021. Any additional services added to this SOW may require an update to the State's current I-APD to allocate additional funds for PM services.
- BerryDunn will support DHHR through a future EDS Advance Planning Document (APD) submission over the course of this SOW. For the purposes of this SOW, BerryDunn assumed the need to update the current APD for federal fiscal year (FFY) 2022 and FFY 2023.
- This work will begin upon approval of this SOW and a mutually agreed-upon date. This work is tentatively scheduled to begin on May 9, 2022, and is projected to continue for five months.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting our work; and lists the estimated hours for 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 EDS project leads 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>Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	Nicole Becnel Eduardo Daranyi Peter Alfrey	175
2.0	<p>Monthly Project Status Reporting</p> <p><i>Service Approach</i></p>	Ryan Wrisley Rachel Moss	60



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>BerryDunn will supply monthly project status reports, commissioner briefings, and CMS executive steering committee reports to the DHHR project sponsors, and/or the federal partners in support of providing objective reporting on the health of the project.</p> <p>The project status reports are intended to supply higher-level executive-level reporting on the status of project deliverables and timeline, as well as associated project issues and risks.</p> <p>The project status reports will be developed, reviewed, and finalized during the first two weeks of each calendar month for the life of the project.</p> <p>The monthly commissioner briefing and monthly CMS executive steering committee report will include overall project status, key project activities, high-level issues/risk updates, and upcoming target milestones.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D02: Monthly Status Reports <p><i>Completion Criteria</i></p> <p>Monthly Project Status Reporting will be deemed complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	<p>Capper</p> <p>Meghann Slaven</p> <p>Jordan Ramsey</p>	
3.0	<p>PM Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management services in alignment with Project Management Institute® (PMI®) standards. The list below contains suggested Project Management Book of Knowledge® (PMBOK®) knowledge areas that will serve as the baseline for project management services:</p>	<p>Ryan Wrisley</p> <p>Rachel Moss</p> <p>Capper</p> <p>Meghann Slaven</p> <p>Tanveer Khan</p> <p>Chris Davis</p>	1,400



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• Communications Management• Risk and Issue Management• Stakeholder Management• Scope Management• Project Integration Management• Quality Management• Cost Management• Schedule Management <p>Upon project initiation, BerryDunn will document agreed-upon expectations for the management of the project inclusive of:</p> <ul style="list-style-type: none">• Meeting facilitation, preparation of meeting materials, and note taking for BerryDunn and State-owned meetings (as requested)• Management of project logs (action items, risks, issues, and decisions)• Location of project documentation repository in an agreed-upon SharePoint location• Providing additional resources and Subject Matter Experts (SMEs) to support the project's needs <p>BerryDunn will also facilitate weekly meetings with State project sponsor(s) and project leads to discuss project status across each project area. BerryDunn will use this time to make the State aware of project risks, issues, and/or items that might require its attention. The team will also use this time to plan risk and issue mitigation and responses.</p> <p>PM Support will be provided across all tasks throughout the scope of this implementation.</p> <p><i>Deliverable(s)</i></p>	<p>Meghan Crown</p> <p>Mo Maitland</p> <p>Caitlin Poling</p> <p>Jordan Ramsey</p>	



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• D03 – Meeting Facilitation, Materials, and Notes• D04 – Project Logs (action item, risk, issue, and decision logs)• D05 – Status Meetings <p><i>Completion Criteria</i></p> <p>PM Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
4.0	<p>Data Governance Activities</p> <p><i>Service Approach</i></p> <p>In support of this effort, BerryDunn will continue support of the DGC and Data Stewards Team, as well as external departments and agencies involved in data management processes in collaboration with DHHR.</p> <p>BerryDunn will also develop a repository of data governance policies, procedures, and documentation to support key stakeholders and the DGC. BerryDunn will provide support for the implementation of the committee's planned operational goals and objectives.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none">• D06 – Data Governance Repository <p><i>Completion Criteria</i></p> <p>Data Governance Activities will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Ryan Wrisley</p> <p>Meghann Slaven</p> <p>Jim Strassenburgh</p> <p>Meghan Crown</p> <p>Sarah Vintorini</p>	825
5.0	<p>Requirements Management and Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide PM services in support of the</p>	<p>Ryan Wrisley</p> <p>Meghann Slaven</p>	1,400



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>requirements analysis, system design, development, and implementation phases of the EDS Project.</p> <p>During the requirements analysis, system design, and implementation phases, BerryDunn will work with the State to review the Vendor's proposed solution for all requirements included in the Request for Proposal (RFP) (inclusive of proposed gaps). Subsequent to requirements review, the project team will work with the Vendor to refine and validate the solution for each EDS requirement.</p> <p>Throughout the design, testing, and implementation phases of the EDS project, the State and BerryDunn will work with the Vendor to clarify and validate the design for each requirement.</p> <p>To help ensure the requirements are representative of the State and Vendor's agreed-upon solution, BerryDunn may assign a track lead for each group of requirements to assist the State through the requirements design, development, and implementation. The groups of requirements will be based on the Vendor's proposed approach to requirements validation. The track leads would be the State's primary points of contact for each requirement area and would work with BerryDunn and the Vendor to define, clarify, and test each requirement's design.</p> <p>BerryDunn will also be responsible for meeting facilitation and/or note taking (when requested by the State) during discussions in which requirements might be impacted.</p> <p>Although the Vendor is responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability matrix (RTM), BerryDunn will be responsible for helping to ensure the RTM reflects the State and Vendor's agreed-upon solution.</p>	<p>Mo Maitland</p> <p>Meghan Crown</p> <p>Sarah Vintorini</p> <p>JT Smith</p>	



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p><i>Deliverable(s)</i></p> <p>No PMO deliverables will be supplied in support of Requirements Management and Support.</p> <p><i>Completion Criteria</i></p> <p>Requirements Management and Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
6.0	<p>Deliverable Management and Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will utilize our standardized approach to monitoring and providing management oversight for the quality of project deliverables, artifacts, and other work products submitted by the Vendor. BerryDunn will work to establish expectations early in the development process, when there is still time to adjust course on a deliverable or task without significant impacts to the project schedule. Our approach will consist of the following elements:</p> <ul style="list-style-type: none">• BerryDunn will be responsible for the facilitation, tracking, and management of Vendor and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location.• BerryDunn will develop, review, and finalize deliverable acceptance criteria with the Vendor and State.• BerryDunn will participate in Vendor-facilitated draft reviews of contract deliverables.• BerryDunn will review Vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements.• BerryDunn will participate in Vendor-facilitated	<p>Ryan Wrisley</p> <p>Rachel Moss</p> <p>Capper</p> <p>Meghann Slaven</p> <p>Jim Strassenburgh</p> <p>Buffy Cranford</p> <p>Mo Maitland</p> <p>Meghan Crown</p> <p>Caitlin Poling</p>	1,725



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>formal reviews of contract deliverables.</p> <ul style="list-style-type: none">• BerryDunn will collaboratively resolve comments on Vendor-owned deliverables.• BerryDunn will create and obtain signature approval on each PMO- and Vendor-owned project deliverable. Please refer to Appendix B for more information.• BerryDunn will review Vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn will work with the Vendor to help ensure all deliverables have approved acceptance criteria that have been validated by the State. BerryDunn will also work with the State and Vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also develop comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments. <p>Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each PMO- and Vendor-owned project deliverable and milestone by means of a deliverable acceptance form (DAF).</p> <p>BerryDunn will also work with the EDS Vendor to help ensure both BerryDunn and the EDS Vendor's deliverable review processes are aligned.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">▪ D07 – Deliverable/Milestone Attestation Forms <p><i>Completion Criteria</i></p> <p>Deliverable Management and Support will be deemed</p>		



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	complete upon signature acceptance of the Project Closeout Summary.		
7.0	<p>Federal Review and Certification Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall PM services support for required federal reviews and certification. This includes assisting the State with development of the approach, process, and methodologies used to manage the project and create associated deliverables required for federal reviews and certification. DHHR is currently engaged in discussions with CMS relative to the OBC approach for the EDS.</p> <p>BerryDunn will work with the State and the federal partners to identify the documentation needed to assist the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services with scheduling, facilitating, and managing any federal on-site visits or reviews. Key OBC activities and milestones include:</p> <ul style="list-style-type: none">• Define Outcomes Statements• Define Evaluation Criteria and Required Evidence• Define Key Performance Indicators (KPIs)• Certification Readiness Planning• Operational Readiness Review• Pre-Certification KPI Reporting• Certification Request Letter• Certification Review (DHHR anticipates the certification review to occur six months after	<p>Chris Davis</p> <p>Tanveer Khan</p> <p>Jim Strassenburgh</p> <p>Shelly Schram</p> <p>Melinda Trail</p>	550



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>go-live)</p> <ul style="list-style-type: none">• System Acceptance Letter• Post-Certification KPI Quarterly Reporting <p>BerryDunn will provide support services to the State by leveraging and reusing the State's existing functionality and processes to help prevent unnecessary duplication.</p> <p>The services outlined in support of these certification-related services were modeled after OBC guidance from CMS. Any deviation from CMS guidance might impact the project's scope, timeline, and/or budget.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D08 – State-Completed Certification Checklists• D09 – Completed Certification Evidence Packets and Related Artifacts <p><i>Completion Criteria</i></p> <p>Federal Review and Certification Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
8.0	<p>Vendor Management and Contract Management Services</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Vendor Management and Contract Management Services support for the EDS project. This includes, but may not be limited to:</p> <ul style="list-style-type: none">• BerryDunn will monitor and evaluate contractor activities including deliverables and Service Level Agreements (SLAs) against contract terms.	<p>Ryan Wrisley</p> <p>Meghann Slaven</p> <p>Mo Maitland</p> <p>Meghan Crown</p>	425



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">BerryDunn will evaluate the existing EDS Vendor to help ensure continued best value of the existing contract.BerryDunn will monitor contractors' internal risk management controls and financial condition.BerryDunn will assist in maintaining effective relationship with Vendors. BerryDunn will also assist in defining, communicating, and implementing ways to improve Vendor relationships.BerryDunn will also assist the State in collecting and retaining Vendor Performance Scorecard Data. This data will contain performance review records based on the EDS contract's KPIs and SLAs. <p>The Vendor Management and Contract Management Services outlined within this SOW will be limited to the solutions implementation and initial operation.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">D10 – Vendor Performance Scorecard Data <p><i>Completion Criteria</i></p> <p>Vendor Management and Contract Management Services will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
9.0	<p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of IAPD-U for the EDS to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners. BerryDunn has included a minimum of two APDs within the</p>	<p>Ryan Wisley</p> <p>Meghann Slaven</p> <p>Dawn Webb</p> <p>Chris Davis</p> <p>Jordan Ramsey</p>	250



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>budget. BerryDunn also included the number of hours associated with the creation of the APD to support operations in this SOW.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D11 – APD(s) <p><i>Completion Criteria</i></p> <p>The APD Support phase of the project will be deemed complete upon signature approval of the Project Closeout Summary.</p>		
10.0	<p>Testing Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources to assist DHHR with the System Integration Testing (SIT), User Acceptance Testing (UAT), Pilot Testing (where applicable), and Operational Readiness Testing (ORT) efforts.</p> <p>Assistance during SIT, UAT, and ORT is outlined as follows:</p> <ul style="list-style-type: none">• BerryDunn will provide assistance with relevant expertise to assist DHHR with the review of SIT cases and results. BerryDunn will also assist with the monitoring of SIT defects and the impact to overall project health.• BerryDunn will assist DHHR with updates to the UAT Plan as needed, as well as UAT test scenarios. This will require close coordination of both the Vendor's and State's UAT Plans.• BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes as well as issues and defects identified over the course of this testing	<p>Tanveer Khan</p> <p>Jim Strassenburgh</p> <p>Cynthia Taylor</p> <p>Dorothy Ball</p> <p>Buffy Cranford</p> <p>Meghan Crown</p> <p>Jonathan Watkins</p>	1,990



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>phase.</p> <ul style="list-style-type: none">BerryDunn will assist DHHR with the facilitation and validation of the Vendor's services as they relate to ORT. BerryDunn will also be responsible for those services necessary to assist DHHR in validating that it is operationally ready for system go-live. <p>To help ensure the requirements are representative of the agreed-upon solution between the State and Vendor, BerryDunn's assigned track leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the Vendor to define, clarify, and test each requirement's design.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">D12 – UAT Plan Updates as needed (<i>The UAT Plan was developed and approved in Phase I of the EDS Project</i>) <p><i>Completion Criteria</i></p> <p>The Testing Support phase will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
11.0	<p>DDI Validation</p> <p><i>Service Approach</i></p> <p>In Phase I of the EDS Project, the decision was made to continue the legacy solution operations three months post-go-live in order to help ensure full stability of the EDS. Based on this decision, BerryDunn will support the State with the transition from the legacy DW/DSS to the EDS.</p> <p><i>Deliverable(s)</i></p>	<p>Ryan Wisley</p> <p>Rachel Moss</p> <p>Capper</p> <p>Meghann Slaven</p> <p>Chris Davis</p> <p>Jim Strassenburgh</p> <p>Tanveer Khan</p>	275



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>No PMO deliverables will be supplied in support of DDI Validation.</p> <p><i>Completion Criteria</i></p> <p>This phase of the project will be deemed complete upon signature approval of the Project Closeout Summary.</p>	Caitlin Poling	
12.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred 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">D13 – Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn Project Closeout services will be considered complete when the DHHR project sponsor or his/her designee formally accepts the complete EDS solution from the Vendor and signs the Project Closeout Summary.</p>	Eduardo Daranyi Nicole Becnel Ryan Wrisley Meghann Slaven JT Smith Jordan Ramsey	137
Total Hours			9,212
Total Not-To-Exceed Cost Estimate			\$1,270,330



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for the current contract. The following rates were used to compute the costs in the table:

- EM = Engagement Manager (\$270/hour)
- LPM = Lead Project Manager (\$215/hour)
- GPM = General Project Manager (\$175/hour)
- SS = Support Staff (\$80/hour)

Table 2: Project Resources

CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	33	\$8,910
1	LPM	\$215	Eduardo Daranyi	58	\$12,470
4	GPM	\$175	Peter Alfrey	100	\$17,500
4	GPM	\$175	Ryan Wisley	662	\$115,850
4	GPM	\$175	Rachel Moss Capper	615	\$107,625
4	GPM	\$175	Meghann Slaven	624	\$109,200
4	GPM	\$175	Buffy Cranford	665	\$116,375
4	GPM	\$175	Jim Strassenburgh	625	\$109,375
4	GPM	\$175	Tanveer Khan	635	\$111,125
4	GPM	\$175	Cynthia Taylor	725	\$126,875



CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
4	GPM	\$175	Dorothy Ball	200	\$35,000
4	GPM	\$175	Chris Davis	70	\$12,250
4	GPM	\$175	Dawn Webb	120	\$21,000
4	GPM	\$175	Mo Maitland	425	\$74,375
5	SS	\$80	Shelly Schram	320	\$25,600
5	SS	\$80	Meghan Crown	448	\$35,840
5	SS	\$80	Sarah Vintorini	447	\$35,760
5	SS	\$80	JT Smith	505	\$40,400
5	SS	\$80	Caitlin Poling	558	\$44,640
5	SS	\$80	Jonathan Watkins	560	\$44,800
5	SS	\$80	Melinda Trail	557	\$44,560
5	SS	\$80	Jordan Ramsey	260	\$20,800
			Total Hours and Total Costs:	9,212	\$1,270,330.00



4.0 Project Hours and Costs per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project. Please be advised, these estimates may fluctuate based on the project's status.

Table 3: Project Costs by Month

Month #	EM	LPM	GPM	SS	Est. Hours Per Month	Est. Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	5	10	1,099	704	1,818	\$252,145
Month 2	5	10	1,104	704	1,823	\$253,020
Month 3	5	10	1,091	722	1,828	\$252,185
Month 4	9	14	1,091	730	1,844	\$254,765
Month 5	9	14	1,081	795	1,899	\$258,215
Total	33	58	5,466	3,655	9,212	\$1,270,330



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5
1.0 Engagement Oversight					
2.0 Monthly Project Status Reporting					
3.0 PM Support					
4.0 Data Governance Activities					
5.0 Requirements Management and Support					
6.0 Deliverable Management and Support					
7.0 CMS Certification Support					



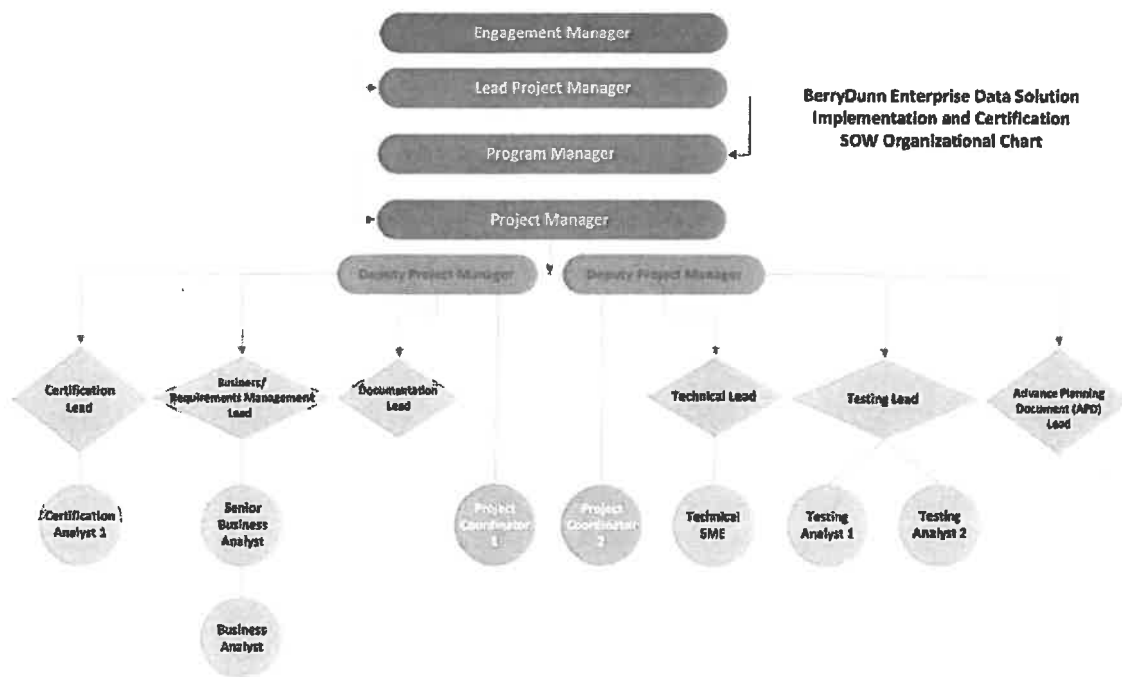
Task	1	2	3	4	5
8.0 Vendor Management and Contract Management Services					
9.0 APD Support					
10.0 Testing Support					
11. DDI Validation					
11.0 Project Closeout					



6.0 Organizational Structure

The following diagram contains detail as it relates to the organizational structure of the BerryDunn EDS Project Management Team.

Figure 2: Organizational Structure





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.

March 14, 2022

Signature

Date

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

4/20/22

Signature

Date



Appendix A: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal (employed 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®

Overview

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

Relevant Experience

West Virginia Department of Health and Human Resources (DHHR) Bureau for Medical Services (BMS).

- o *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to present)*
Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementing a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation



of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to present).*
Nicole leads the project team implementing the overall EVV solution, which includes 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 onboarding, vendor deliverable review, and UAT planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).*
Nicole is the Lead Project Manager for West Virginia's largest information technology transformation project, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 to present)*
Nicole is the Lead Project Manager overseeing the development and approval of Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.
- *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for



epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.

- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*

Nicole was the Lead Project Manager overseeing the team, assisting the State help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*

Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

- *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 to 09/2020)*

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add the



Children's Health Insurance Program (CHIP) to the program. BerryDunn assisted the State with developing a Request for Proposal (RFP) to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted the increased quality of care, health outcomes, and data quality and efficiency for the State's managed care populations.

- *Provider Management Support (7/2019 to 1/2021)*
Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the MITA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that participate monthly.
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (8/2015 to 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SSA findings and focus on the DHHR goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system



modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- *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.



- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
 - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
 - *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
 - *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
 - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
 - *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
 - *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
 - *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
 - *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Technical Assistance and Program Support (TAPS) (11/2018 to 10/2019)*
 - *Electronic Visit Verification Solution Implementation (06/2018 to 12/2019)*
 - *Provider Enrollment (PEA) Year 2 (05/2018 to 05/2019)*
 - *Contract Edit Fee Schedule Review (09/2017 to 09/2018)*
 - *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
 - *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 to 08/2018)*
 - *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*



- *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- *Provider Re-enrollment (PEA) (03/2017 to 02/2018)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Income Maintenance Manual (IMM) Update (09/2016 to 09/2017)*
- *Access to Care Project (Access Monitoring Plan Phase) (04/2016 to 10/2016)*
- *Updates to West Virginia Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014)*
- *Provider Enrollment (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*

- **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 September 2005
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Education, Lesley College BS, Physics, Mathematics, and Business Administration, Hillsdale College Certified Project Management Professional Systems Engineering Development Program, Electronic Data Systems

Overview

Ed is a principal at BerryDunn with 20 years of experience managing and providing quality assurance oversight of large-scale technology initiatives. He has served in a project management and quality assurance 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.

- **West Virginia Bureau for Medical Services (BMS) (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 DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; ACA analysis, and advisory services; ICD-10 compliance; E&E systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; CHIP implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives. Since Ed joined the West Virginia project on a full



time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.

- o *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (2019 to present).*

Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

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

Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

- o *People's Access to Help (PATH) DDI Project Management (10/2017 to present).*

Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services



programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present).*
Ed has been the Engagement Manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.



- *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present).*

Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the Data Warehouse/Decision Support System (DW/DSS), develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DHHR databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DHHR in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DHHR.

- *QA Oversight of MMIS and Pharmacy 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.

- Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:

- *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)*
- *Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*



- *WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 to 05/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*
- *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
- *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*
- *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*
- *Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*



- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*
- **West Virginia Department of Health and Human Resources (DHHR) (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 (MMIS/FAS) 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.

Martin's Point Health Care (2005 to 2007). Ed led a project management effort for Martin's Point Project Management for Health Insurance Portability and Accountability Act (HIPAA) Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

Goold Health Systems (1999 to 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.



- **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 (1985 to 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 MESC 2014, 8/19/2014

Project Management/Testing, Presentation for NESCSO workshop (2017)

Moderator, MESC Conference sessions (2015-2019)

People and processes: Planning health and human services IT systems modernization to improve outcomes, 11/23/2020 Blog

Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together towards the future and MESC 2020: Where we are today and where we will be tomorrow.



Peter Alfrey, PMP®, Prosci® CCP, LSSGB

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

Overview

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

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

- **West Virginia Bureau for Medical Services (BMS)**
 - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).*
Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and advance planning document (APD) development; and research and tracking of industry



trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's managed care organization (MCO) and data/analytics programs providing program oversight. EPMO projects and programs include:

- *MCO Encounter Data Quality (06/2020 to present).*
Peter provided project oversight and serves as a business analyst supporting State initiatives to optimize MCO encounter data processes for the State's risk-based managed care programs. The State seeks to retire a historical file submission process from the MCOs to their Medicaid Management Information Systems (MMIS) fiscal agent, in coordination with the MCOs and the State's data warehouse/decision support solution (DW/DSS) vendor, IBM® Watson Health.
- *Data Improvement Project (09/2019 to present).*
Peter provides program oversight for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program. BerryDunn helps BMS assess and address data quality and usability issues within the State's MMIS environment and other systems across the State's Medicaid enterprise.
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to present).*
Peter provides project oversight and procurement assistance support for the procurement and implementation by July 1, 2020, of the three MCOs that comprise the current MHT program.
- *Contact Tracing (04/2020 to 09/2020).*
Peter provided project management support to DHHR for the implementation of the State's COVID-19 contact tracing platform in August 2020, helping the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. He also supported the procurement and implementation of the contract tracing platform in less than three months, helped develop project communications and training tools, and developed 12 staff hiring requirements and job descriptions to support contact tracing and future Bureau for Public Health disease investigation efforts.



- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise (MHP) Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020).*

Peter provided program management oversight for the desktop review of documentation for the MHP MCOs to help ensure the MCO met the operational standards of the MHP, a specialized managed care program to serve children in foster care and adoption assistance in the State. In addition, Peter provided project oversight and procurement assistance for the project, and developed policies and procedures for the procurement and implementation of the MCO for the MHP program that began operations on March 1, 2020. In addition, Peter provided project oversight for the MHP program as it transitioned to operations in March 2020 with the MCO, Aetna Better Health® of West Virginia.

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

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

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

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



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

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

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

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and user acceptance testing (UAT) support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

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

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

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

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

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

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



- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present).*
Peter provides program oversight of the project that provides project management services, procurement assistance, and facilitation of the integration of data sources to the EDS and Centers for Medicare & Medicaid Services (CMS) certification support for the EDS Project.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019).*
Peter served as the organizational change management (OCM) lead for the IES, providing strategic direction and oversight to the project team. Peter built a joint team of individuals from the IES vendor, Optum, and BerryDunn to launch the OCM program and supporting communications campaign. During that time, OCM became a core component of the IES/PATH project. Through Peter's leadership, the OCM team created an OCM plan to launch OCM efforts for the project; created a communications toolkit and communications materials; and conducted over 50 interviews with individuals across DHHR for an OCM readiness assessment to support the IES/PATH project.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).**
Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.
- **Vermont Green Mountain Care Board – Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014).**
Peter led the efforts to help the Green Mountain Care Board build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.
- **Maryland Health Benefit Exchange (HBE) – Independent Verification & Validation for Maryland's HBE Implementation (03/2014 to 04/2014).**
As a business analyst, Peter worked with Maryland's Project Management Office and its



strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

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

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

Presentations

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

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

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

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

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



Ryan Wrisley, MHCDS, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn from 2011 to 2014 and since 09/2019)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	MHCDS, Dartmouth College BA, Business Administration, University of Maine at Orono Project Management Professional, Project Management Institute

Overview

Ryan is an experienced project manager, with a unique blend of business and technical experience through his IT strategic planning and requirements development work with state agencies and his previous work as implementation manager for a vendor of commercial financial accounting software. He is experienced in managing large-scale engagements/projects and leading initiatives that promote the open exchange of ideas and strengthen organizational performance.

Relevant Experience**BerryDunn (2011 to 2014; 09/2019 to present)**

- **Maryland Health Benefit Exchange – IV&V for Maryland’s HBE Implementation (11/2012 to 04/2014).**
Ryan served as a quality assurance analyst for a project valued at approximately \$200 million dollars. He worked closely with the project manager and the project team who performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the Executive Leadership of the project.
- **West Virginia Offices of the Insurance Commissioner (OIC) – Health Insurance Exchange Planning (06/2011 to 03/2013).**
Ryan served as Project Manager for the development of a Strategic Technology Plan to



guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition, he has provided program and portfolio management of the OIC's various planned initiatives that must take place in order for the HIX to become fully operational and comply with Federal healthcare reform requirements.

- **Maine Human Resources Division (HRD) – System Analysis and Requirements Development for Procurement of Human Resources Management System (03/2012 to 08/2012).**

Ryan served as project manager for the development of requirements for an RFP to procure a Human Resources Management System (HRMS) for the State of Maine's HR Division. Ryan's responsibilities included:

- Conducting a Current Environment Assessment
- Documenting process flows for each of the major business processes
- Identifying issues, challenges, and bottlenecks within each process flow
- Conducting research of peer state agencies
- Developing technical and functional requirements for inclusion in an RFP to procure a new HRMS

- **Massachusetts Office of the State Auditor (OSA) – IT Roadmap (04/2012 to 06/2012).**

Ryan served as project manager for BerryDunn's engagement to develop a 48-month Technology Roadmap. His responsibilities included:

- Conducting a Current Environment Assessment
- Identifying issues, challenges, and bottlenecks with current systems and processes
- Conducting research of peer state agencies
- Developing technology initiatives to address the issues, challenges, and bottlenecks
- Providing a Technology Roadmap to guide the State Auditor's Office over a four-year horizon

- **New Hampshire Liquor Commission (NHLC) – Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012).**

Ryan served as project manager for a systems planning and RFP development project



for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse Inventory Management System, Liquor Inventory and Distribution System, and supporting back office systems.

Maine Health Accountable Care Organization (MHACO) (2015 to 09/2019). As the senior director of data operations and analysis, Ryan was responsible for data operations, analytics and clinical applications teams for the MHACO. He procured an enterprise-wide multi-million-dollar Population Health Management Software Tool; was responsible for the aggregation of EMR/EHR data across different EMR/EHRs as well as claims data from commercial payors and CMS MSSP; developed analytic strategy and plan tied to operating plan to enable data-driven decisions; developed a data request triage process as well as data request help-desk process, and implemented help-desk software; and oversaw the legacy internally built clinical integration registry and the transition to the new Population Health Tool.

Dartmouth Medical School, Northern New England Accountable Care Collaborative, & High Value Health Care Collaborative (2014 to 2015). Ryan served as an account manager and program director, hired by Dartmouth Medical School to work with NNEACC and HVHC to establish process and structure around programs and manage member accounts. He established internal project management process, and worked with core disease research teams at HVHC to determine and develop structure around each of the teams and assist in providing focus, tracking deliverables, developing reporting process, and defining value and goal attainment.

Tyler Technologies (2002 to 2011). As implementation manager for Tyler Technologies (formerly Advanced Data Systems), Ryan managed a team of consultants implementing financial software for the company's School Solutions Division. He managed software implementations in accordance with PMI standards for schools and health centers. Ryan successfully managed over 350 projects from point of sale to handoff to support, including meeting with clients to establish a project timeline, creating and reviewing documentation, facilitating client status meetings, obtaining client approval of key deliverables and milestones, providing quality assurance oversight of implementation activities, and managing staff resources. In addition, he provided client software support for MUNIS financial accounting software.

Bath Iron Works (1999 to 2000). As a buyer for Bath Iron Works, Ryan managed a multi-million dollar budget and was responsible for purchasing multiple commodities. He implemented an inventory system for warehousing at the shipyard, developed and maintained purchasing contracts with suppliers, and assisted with the shipyard's SAP procurement system implementation.



Rachel L. Moss Capper, LCSW, MSW

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

Overview

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

Relevant Experience

BerryDunn (12/2018 to present)

- **West Virginia Bureau for Medical Services (BMS)**
 - *West Virginia Children's Health Insurance Program (WVCHIP) ORR (09/2020 to 10/2020)*
Rachel was part of the team completing the desktop review of documentation for three Managed Care Organizations (MCOs) to help ensure standards of the Mountain Health Trust (MHT) and WVCHIP were met by the MCOs for the



inclusion of WVCHIP carve-in into the MHT by January 1, 2021.

- **Mountain Health Promise (MHP) and MHT Mental Health Parity Compliance *Plan Development (04/2020 to 08/2020)***

Rachel served as the project manager for the compliance plan development. She managed a cross-functional team focused on the current managed care contract's adherence to federal mental health parity mandates between its physical and behavioral health care services. She facilitated information gathering sessions with various BMS subject matter experts and managed care vendors. The State was successful in submitting the Compliance Plan to the CMS and receiving approval. Under Rachel's leadership, this project was completed on time and under budget.

- **State Plan Review and Support (03/2020 to *present*)**

Rachel serves as a business analyst on the SPRS project. She has focused on collection, verification, indexing, and development of extensive gap analysis reports between the existing and newest Medicaid state plan formats, as well as drafting a roadmap for transitioning all the eligibility content to MACPro.

- **MHT Managed Care Procurement (07/2019 to 09/2020)**

Rachel developed policies and procedures for the procurement and implementation of the three MCOs for the MHT program that began operations on July 1, 2020.

- **MHP ORR (12/2019 to 03/2020)**

Rachel was part of the BerryDunn team engaged to assist the State with the initial ORR for the new managed care program. She assisted with the desk level review assessment for the MHP MCO, developing findings reports for the MCO systems review demonstrations. These findings were used to develop a corrective action plan to assist the MHP vendor in meeting contract requirements in advance of providing services to clients.

- **BMS/Bureau for Children and Families (BCF) National *Electronic Interstate Compact Enterprise (NEICE) Grant Development (06/2019)***

Rachel led the grant development and execution, as lead writer and project manager to the BerryDunn and stakeholder contributors. The efforts resulted in a successful proposal with the State securing the funding opportunity.

- **1915(c) *Children with Serious Emotional Disturbance Waiver Development Project (12/2018 to present)***

Rachel supports the 1915(c) Waiver project with business analysis and



management tasks.

- *Substance Use Disorder (SUD) Waiver Initiative Project (12/2018 to present).* West Virginia requested BerryDunn's assistance with development of an 1115 Medicaid waiver to develop a comprehensive continuum of substance abuse treatment services, including a naloxone initiative, statewide screening, methadone treatment and support services, peer recovery services and Medicaid coverage for all American Society of Addiction Medicine (ASAM) residential treatment levels, including withdrawal management. Rachel serves as a subject matter expert for the project. She facilitated the 'go-live' for the waiver's managed care implementation, leading BMS' managed care workgroups with vendors to help ensure a smooth transition from fee-for-service to managed care. Rachel was also central to West Virginia's procurement of a SUD-specific EHR, development of a process for residential bed management, and a bio-psychosocial assessment platform for use statewide.

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

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

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

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



Meghann Slaven

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 10/2017)
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	BS, Journalism, Ohio University BFA, Performance & Choreography, Ohio University

Overview

Meghann is a senior consultant with BerryDunn's Medicaid consulting practice focused on helping state health and human services agencies achieve their project objectives. She brings value to every project and project team through her ability to provide effective procurement management, project management, project coordination, and database maintenance support. Meghann has worked on multiple projects supporting critical initiatives for the West Virginia Bureau for Medical Services (BMS).

Relevant Experience**BerryDunn (10/2017 to present)**

- **West Virginia Department of Health and Human Resources (DHHR) – Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 to present).**
As a deputy project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, and proposal evaluation processes. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Meghann assisted the project team in developing a data governance roadmap.
- **West Virginia Bureau for Medical Services (BMS)**
 - *Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020).*



(07/2019 to present).

As a business analyst, Meghann assists West Virginia in developing and updating its Health Information Technology Plans, including the Medicaid Information Technology Architecture (MITA) HIT Companion and the annual HIT and HIE APD, to help the client gain over \$9 million in federal funding for HIT activities and initiatives.

- *Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 to 09/2019).*

Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to West Virginia in an effort to assist with the integration of data sources, systems, and databases within BMS. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of project deliverables. As project coordinator Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix; proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed Visio process flows to document client data sharing practices.

- *Gap Analysis and Project Management Services (10/2017 to 06/2018).*

As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of the capstone project deliverable. As part of a team analyzing over 2,600 impacts from the Affordable Care Act (ACA) on West Virginia Medicaid's policy, systems, and business processes, Meghann assisted with research, writing, and assessment activities to support the development of a compliance gap analysis deliverable.

West Virginia School Service Personnel Association (11/2014 to 10/2017). As a public relations specialist, Meghann was responsible for developing advocacy campaigns, monthly newsletters, press releases, public service announcements and speeches. She was also responsible for social media management including Facebook, Twitter and LinkedIn; conference planning and logistics; media relationships; and lobbying for association and partner associations.

College Summit (04/2011 to 07/2014). Meghann served as the school partnership manager,



providing consulting and management of College Summit program to partner schools in West Virginia. She trained and supported educators in delivery of College Summit curriculum and online tools; met with school counselors, educators and administrators on a bi-monthly basis to ensure school performance according to milestone achievement; guided students through processes to ensure postsecondary success; and facilitated meetings to track progress and share data measurement and analysis.

University of Charleston (10/2006 to 03/2011). During her time with the University, Meghann held the following positions:

- **Assistant Director of Admissions (08/2008 to 03/2011).** Meghann assisted the Admissions Director in development of enrollment plan, developed geographical recruitment plan for admissions representatives, and trained and managed admissions representatives.
- **Admissions Representative (10/2006 to 08/2008).** Meghann was responsible for recruitment in specified territory. She served as a University representative at recruitment events, as well as evaluated applicants, facilitated the admissions process, counseled students and families on financial aid, and assisted in implementing enrollment activities.

Clay Center for the Arts and Sciences (08/2005 to 09/2006). As a group reservations coordinator, Meghann scheduled group visits to Avampato Discovery Museum, Clay Center, and West Virginia Symphony Orchestra. She was responsible for maintaining and analyzing the database regarding group attendance, and assisted with museum programs and special events.

American Dance Festival (06/2004 to 07/2004). As a press and marketing intern, Meghann developed and distributed press releases and public service announcements, and coordinated visiting critic events.



Buffy Cranford, EdD, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 11/2020, subcontractor to BerryDunn starting on 12/2019)
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	EdD, Educational Leadership and Administration, General, Doane University (<i>in progress</i>) Master's Degree, Management, Doane University BA, English, Theatre English, University of Nebraska Certified Project Management Professional

Overview

Buffy brings more 20 years of experience in designing specifications, testing, and implementing software solutions on a variety of projects and platforms, including IBM Curám. She specializes in organizational change management, knowledge management, communications, training, and documentation design and implementation. Her experience includes serving in dual roles as the State of Nebraska, Department of Labor Employment Service Manager for the Virtual Service Unit, and as the Wagner-Peyser Program Coordinator. Previously, she has also served in private industries specializing in human resources, client services, technical documentation writing and editing, training, billing, and contracts. Competencies include Federal Medicaid and Labor programs, stakeholder assessment, quality assurance, project management, program management, RFP writing, communications, credibility building, and client management.

Relevant Experience

BerryDunn (12/2019 to present). As a senior consultant, Buffy serves as the OCM Lead on the West Virginia People's Access to Help (WV PATH) project. She manages the identification, development, and implementation of organizational change management and operational readiness activities. This includes updating and expanding the OCM Project Plan in alignment with the RFP, tracking and producing OCM deliverables, providing status reports for OCM and Training responsibilities and tasks, and working in collaboration with the state of West Virginia to streamline communications. She has also led the COVID-19 task tracking team and built strong relationships with State Bureaus by coordinating communications, escalating tasks, and monitoring the progress of tasks and adherence to Federal governance.



Cognosante (08/2018 to present). As a senior associate and organizational change manager, Buffy has served as the OCM Lead on numerous projects, primarily Medicaid and Economic Assistance eligibility and their associated programs, and the Arkansas Juvenile programs. She managed all aspects of Organizational Change Management for Medicaid Eligibility, based on all requirements set forth in the RFP. This included collaborating with State and System Integrator teams in creating goals, timelines, deliverable expectation documents, and project status reports; serving as a track expert in design and JAD sessions of the new eligibility systems for Medicaid and Economic Assistance; and reviewing resolutions in finalizing OCM, training, communications, change impact, knowledge transfer, and roll-out plans.

State of Nebraska (04/2016 to 08/2018). As the administrator of the Eligibility and Enrollment Solution project team, Buffy managed multiple projects including the new Medicaid eligibility system, asset verification system, procurements, and contract management. She led all facets of organizational change management, communication, training, and documentation design and implementation, which included the following responsibilities:

- Write and update Communications, Training, and OCM plans, and align with contractual requirements.
- Guide and manage creation and approval of Training approach, the design of process and training manuals, virtual training, and ongoing support materials.
- Analyze Request for Proposals (RFPs) and contractual requirements to ensure vendors deliver accurate design and functionality.
- Develop detailed project plans for each component of organizational changes, training, documentation development and communication approaches, by identifying sequential activities.

She also served as the Information Systems and Technology Privacy Officer, overseeing security of Medicaid software and hardware. This included creating and updating the Privacy Office Policy and Program Manual to create a prescriptive set of processes and procedures aligning with Federal and State of Nebraska Information Technology security policy and standards.

ACCESSNebraska Lincoln Customer Service Center (06/2013 to 04/2016). Buffy oversaw the direction and organization of the Medicaid and Long-Term Care services. She performed organizational change management analysis, reorganized the Lincoln Customer Service Center, assigned workers into skill sets, minimized phone queues, and reduced call wait times from forty-five minutes to five minutes or under for over two years. She created and implemented yearly strategic plans for both Customer Service Centers by examining resources, goals and objectives of the agency; updated and monitored performance metrics and developed



dashboard monitoring strategies to ensure clients received efficient and accurate customer service; collected and analyzed data and trends for the Medicaid and Long-Term Care call centers, and implemented strategies to increase service levels; directed multifunctional programs, improved efficiency, and increased the monthly quality assurance accuracy percentage with an average of 97.5 to 98%; and reviewed interactive voice response systems to reduce phone queues and improve customer service, and served on a workgroup reviewing upgrades to the interactive voice response systems.

Nebraska Department of Labor (10/2011 to 06/2013). Buffy designed and implemented the Virtual Services Unit call center for improving the federally funded labor exchange by retaining and marketing to new and existing employers and adding and attracting skilled labor to the NEworks system. She designed an intense training program, including quality assurance guidelines and scripts, for new Workforce Coordinators, and conducted follow-up training.

Buffy also served as the program coordinator for the Wagner-Peyser Act, assisted in creating and communicating policy initiatives, procedures, and goals for WagnerPeyser employees. She developed federal grant applications and corrective action plans; designed an online training program and conducted weekly trainings for the NEworks online labor exchange system to assist in learning new technology; and assisted in designing the yearly federal incentive for enhancing the administrative delivery of employment and training activities in the Nebraska career centers, Workforce Regions, and surrounding communities.

TerraScan Inc. (03/2007 to 01/2011). Buffy managed the Human Resources department, including overseeing employment, job postings, resume review, interviewing, hiring, maintaining sensitive documentation, and training of new and existing staff on policies and procedures.

Computer Services Inc. (11/2001 to 03/2007). As a technical writer and application product specialist, Buffy managed online and hardcopy documentation for product releases and enhancements. She supervised work teams responsible for designing enhancements, programming, and testing banking software across the nation; conducted comprehensive testing of banking software; and designed help files and created articles for company announcements.

MindVision Software (10/2000 to 11/2001). Buffy answered software and eSellerate technical support questions daily by e-mail and phone. She edited the User's Guide for Installer VISE, conducted comprehensive testing of software and eSellerate web site, and performed on-site training of new software to Lincoln Stars administrators.



Jim Strassenburgh

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 06/2014; subcontractor to BerryDunn beginning 02/2013)
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	BA, Philosophy, St. Lawrence University

Overview

Jim is a skilled senior consultant with BerryDunn's Government Consulting Group. He has over 20 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. Over the past five years, Jim has focused on healthcare systems, working with BerryDunn on several state Medicaid IV&V projects.

Relevant Experience

BerryDunn (02/2013 to present). With BerryDunn's Medicaid consulting practice, Jim has worked on the following projects. He began with BerryDunn as a subcontractor in 2013 before joining the firm full-time in June of 2014.

- **West Virginia Department of Health and Human Resources (10/2019 to present)**
 - *Enterprise Data Services and Data Source Program (01/2020 to present).*
Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
 - *PATH/IES Program (10/2019 to present).*
Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.



- **Massachusetts HIX/IES Entities – IV&V Services (05/2014 to 09/2019).**
Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.
- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).**
As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.
- **Missouri Department of Social Services – Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services.**
Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

MetroSource, Corp. (1995 to 2012). Jim founded this hybrid consulting and software development company, providing systems architecture, data center virtualization, and business continuity services, including development of systems infrastructure documentation for performance engineering environment for Paychex and an after-hours trading system for Japan to support a high-volume retail equity trading system. Jim also designed and implemented high-availability architecture for AT&T's internet service, WorldNet.

Rochester Institute of Technology (01/2010 to 12/2011). Jim served as the enterprise project manager in building a shared services computing model and the construction of a new green data center facility for one of the largest private universities in the country. In this role, he developed new service processes and chargeback models based on shared services; developed formal RFIs and RFPs; provided budgeting and financial modeling, including return-on-investment assessments; developed a disaster recovery solution; and assessed security infrastructure, including IPS/IDS, security compliance, and firewall.

Xerox (05/2008 to 06/2009). As data center infrastructure architect for the Oracle Competency Center, Jim developed enterprise Service Oriented Architecture (SOA) platform using an Oracle SOA stack; assisted in deploying new enterprise provisioning, alarming, and ticketing services;



and conducted a company-wide assessment of VMware infrastructure of Europe and North American data centers.

NYFIX, Inc. (01/2000 to 07/2006). As Vice President for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.



Tanveer Khan, MBA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since July 2021
Years of Experience Relevant to Proposed Role:	34 years
Certifications and Education:	Bachelor of Arts, Mathematics & Computer Science, Macalester College Master's in Business Administration, University of Southern California Certificate of completion and assessment ISC (2).org for CISSP training 2004 Certificate of completion as Certified UNIX Instructor, 1994

Overview

Tanveer is an experienced business and information technology (IT) service professional with skills in collaborating internally and with customers in successful joint ventures to provide comprehensive Health IT (HIT) coverage. He has over 30 years of progressive experience in various technology solution software. He has delivered exceptional client satisfaction in mission-oriented large-scale IT operations and services.

Experience

Pennsylvania MES (12/2019 to 05/2021). As vice president project executive, Tanveer worked on all aspects of project delivery for the MMIS 2020 initiatives. He collaborated with other module vendor executives to collectively provide bottom line value of the MMIS journey. He was the technological liaison for CMS MES mandates integrated in the enterprise data warehouse and business intelligence reporting, including Transformed Medicaid Statistical Information System (T-MSIS). Tanveer recruited other key personnel for project support and provided solutions for the Commonwealth of Pennsylvania enterprise.

Puerto Rico Medicaid (PRDoH) (12/2018 to 07/2020). Tanveer acted as MES platform lead to author and deliver the MES DED for the Data Governance Plan, EDW augmentation strategy with State and CMS approval. He architected and stood up for Puerto Rico's first Data Governance Playbook with a leadership role in the Executive Steering Committee and delivered on the Puerto Rico Eligibility and Enrollment system and the MMIS enterprise data hub aligning



them with MITA and CMS requirements. Tanveer provided SME support and was the lead solutions architect for performance and security testing.

Xerox Government Healthcare Services (12/2015 to 1/2018). As platform architect lead for projects with New Hampshire-MMIS, New York State Department of Health, eMedNY, Maryland Long-Term Services and Supports (MD-LTSS) for Commercial-off-the-shelf (COTS) implementation, acceptance, and certification. He oversaw tech stack upgrades and solutions for platform implementation. Tanveer also worked on the strategic roadmap for micro services architecture for healthcare modularity and business requirements decompositions to map IV&V charter. He was involved with hands-on creation of complex multi-year budgets, program management and was a key contributor to the executive and client stakeholders. He successfully responded to several breach incidents and mitigated to avoid fines from IRS and CMS government agencies.

Toyota Motor Sales (08/2015 to 11/2015). As Toyota Motor North America (TMNA) enterprise architect (EA)-domain architect / integration / dynamic case management (DCM) lead, he obtained Architectural Review Board (ARB) approval on several DCM project portfolios and worked closely with application management services (AMS) and information management system (IMS) to support TMNA migration goals. Tanveer provided critical input to the office of the Chief Technical Officer (CTO) for Datacenter migration efforts to Plano, TX. He created EA representation of Technical Applications Bullet and systems analysis and design (SAD) with process mapping with integration points for end-2-end representation of a L1, L2, L3 and L4 processes as well as non-function (NFR) security testing and used historical data to complete exchange-to-exchange (E2E) testing for both functional and non-functional (security and performance) testing.

Toyota Financial Services (05/2015 to 08/2015). Tanveer oversaw a team of vendors, contingent workers and associates in a matrix to influence solutions for application development and testing. He was involved in the CORE Receivables Retool as quality assurance manager and integration/total quality management (TQM) lead. He created Visio representation of TAB, SAD and Programming and Software Development into a swim lane process mapping with integration points for end-2-end representation of a L1, L2, L3 and L4 processes. Using those processes, he created time-division multiplexing (TDM) and test cases for automation and integration team. Tanveer also wrote a master test plan that encompassed the E2E view of the over 366 business processes. He mentored team leads and cross team leads that might not have had a particular background in automotive services.

Hyundai Capital America (10/2012 to 10/2014). Tanveer was the enterprise solution architect and integration/TQM lead for the Next Generation Business System (NGBS) platform retool. He worked directly with the stakeholders, executives within the business systems, key COTS



development teams (local/multi-shores), integration partners, database conversion team, infrastructure division, external TPS, and more. He also mapped business process management requirements to IT strategy & solutions, and led economic impact payments (EIP) validation alongside integration services development. Tanveer mentored teams in Agile software delivery, software quality assurance, TQM and performance engineering for company's multimillion-dollar NGBS enterprise platform with 22 systems with over 1,250+ interfaces transacted internally and externally. He provided 24x7 support of product development, QA, TQM validation in support of go-live objectives, to mitigate any potential issues. Tanveer provided scientific validation of metrics for company service-level agreement (SLA) that lead to production readiness, sizing, dress rehearsal, and go-live enterprise platform objectives for E2E business operations.

Aviisha Medical Institute (12/2011 to 09/2012). As contract CTO and technology lead, Tanveer fast-tracked the delivery for full roadmap, lifecycle of phase development, and ability to capitalize on contracted services. He developed storyboards, used case scenarios, and COTS requirements, and managed production SLA and SQM metrics. Tanveer put together a 'fixed cellular terminal' development team of 16 with contingent workers and led the team as 'delivery manager' – PMO, architect, BSA, PM, and conduit to the executive management and external service providers for over 1,000 X.12 electronic data interchange (EDI) interfaces. He implemented full public and B2N interfaces with real-time data sharing (X.12, AS2, ACH) and transaction using CRM, Sitecore, Informatica, and data conversion. He also introduced company's first HIPAA and HL7 compliant security program using NIST 800-53, 800-63 standards.

Zenith American (TPA) (10/2010 to 12/2011). As enterprise solutions architect, Tanveer proposed and developed an service-oriented architecture (SOA)/ enterprise application integration (EAI) based workflow and rules engine to automate decisioning for 1,000,000+ lives for auto adjudication & HCH with B2B integration for four enterprise portals and 29 user domains nationwide with 1,300 API. He was the principal consultant for developing blueprint, technical architecture (TA), business processes automation and testing methodologies to support over 36 systems to be ICD-10 compliant. He directed AS-400 developers to modify message passing interface to support EPIC, Seimens, and Health Unity systems with TIBCO workflow. Additionally, Tanveer oversaw testing and go-live steps. He integrated, validated, and deployed dozens of disparate production transaction systems into J2EE SOA/ESB based messaging platform for OLTP and Data Services

State of Vermont, Department of Health & Human Services (9/2010 to 12/2010). Tanveer was the solution architect that led the effort to develop EA and building of multi-state HIX EDI hub gateway for Medicare/Medicaid payer transactions, coordination of benefits, and EDI integration with mainframe, resulting validation of 2,600+ API across the State & Government



EIP systems. Tanveer was the lead in developing multiple streams of ICD-10 conversion, testing & validation in compliance with MITA 2.x framework. He extended over 1000 API to interconnect AS400 to ORACLE ESB via web-services and data services for handling X12 EDI transaction and data warehouse reporting for regional health information organization and State of Vermont Medicare & Medicaid Systems. He also conducted joint application development sessions with BSA and Stakeholders to refine 79 MITA processes into the State Business Processes to develop TA and evaluated existing state posture on IT.

Tanveer's project experience as a solutions architect include the following:

- Denver International Airport (5/2009 to 9/2010)
- LAX Airport / LAWA (3/2009 to 5/2010)
- Chevron USA (10/2008 to 3/2009)
- Tower Energy Group (12/2007 to 10/2008)
- 20th Century Fox (7/2006 to 12/2007)
- Yellowpages.com (1/2006 – 8/2006)
- Ameriquest Mortgage / Citi Financial Group (9/2004 to 12/2005)
- Avisio, Inc. (9/2003 to 9/2004)
- CarsDirect.com (4/2000 to 9/2001)
- Answer Financial, Inc. 3/1998 to 4/2000
- University of Southern California – (1/1987 to 3/1998)



Cynthia Taylor, LPN, CHP, CHS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Independent Consultant with BerryDunn since 12/2012
Years of Experience Relevant to Proposed Role:	30 years
Certifications and Education:	Licensed Practical Nurse, Trenholm State Technical College Alabama Board of Nursing License Certification in Healthcare Privacy Certification in Healthcare Security

Overview

Cynthia is an independent consultant specializing in the areas of healthcare compliance, Medicaid, and HIPAA privacy and security. A Licensed Practical Nurse (LPN) and former Medical Practice Manager, Cynthia has more than 30 years of medical and healthcare compliance experience, including experience in claims analysis and submission, medical records review and management, physician and patient scheduling, purchasing, budgeting, audits, policy development, training, and personnel management.

Relevant Experience

West Virginia BMS (12/2012 to Present). As a Subcontractor to BerryDunn, Cynthia has worked on several projects for BMS. Highlights include:

- *ICD-10 Implementation (03/2013 to Present):* Cynthia works as a consultant on the ICD-10 Implementation Project and provides support to the Project Manager as a SME on healthcare policy. She assists in the remediation of the current BMS Provider Policy Manual for ICD-10 implementation, facilitates Policy Workgroup Sessions with program areas, and assists in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.
- *Adult Quality Measures Grant Project (03/2013 to Present):* Cynthia supports the collection and reporting of the Adult Core Quality Measures and the implementation of the BMS Quality Unit. She assists with the development of training materials; coordinates training workshops, provides training to staff and to providers; serves as a



resource for providers, stakeholders, and partners requesting assistance; provides expertise in the development of trainings that focus on educating providers in collecting and reporting on the Adult Core Measures, as well as in development of staff training that includes the use of tools for collecting and analyzing the data from claims, surveys, medical records, and encounter records; and works with the Data Manager and Data Analyst to ensure best practices related to data collection and analysis.

- *Affordable Care Act Project (12/2012 to 08/2013)*: For the ACA project, Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.

Alabama Medicaid Agency (07/2002 to 12/2011). As a Senior Healthcare Compliance Consultant for a consulting firm, Cynthia worked on the following projects for the Alabama Medicaid Agency:

- *MMIS Coordinator's Office (06/2006 to 12/2011)*: Cynthia provided business analysis and project support for the MMIS implementation and certification; assisted with the development of an APD and Invitation to Bid for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a Recipient Web Portal, Provider Web Portal for enrollment and re-enrollment, National Correct Coding Initiative (NCCI) edits, and 5010 compliance; and assisted with the development of APDs for NCCI and ICD-10.
- *IV&V and Technical Assistance of the FA MMIS Implementation (04/2006 to 10/2008)*: Cynthia provided project management support; monitored and tracked correspondence between the Agency, FA, and IV&V vendor; reviewed and compiled Agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the Project Manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the Agency and FA delivery schedule.
- *Managed Care External Quality Review (EQR) (06/2006 to 05/2011)*: Cynthia served as Project Lead for the EQR of the Maternity Care Program and Partnership Hospital Program (PHP). Her responsibilities included scheduling, conducting, and documenting assessments of the primary contractors; generating reports to CMS; and providing recommendations to the Agency to ensure compliance with the Managed Care federal regulations.



- *HIPAA Security Implementation (07/2004 to 12/2004)*: Cynthia scheduled Privacy/Security Advisory Group (PSAG) meetings; scheduled, conducted, and documented security risk assessments; produced and distributed HIPAA Security Manuals to Senior Management; produced and distributed the Security Officer's Manual to the Security Officer; and assisted Agency General Counsel in execution of HIPAA Security Business Associate Agreements.
- *HIPAA Privacy Implementation (07/2002 to 06/2004)*: Cynthia worked with the Agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing Agency Notice of Privacy Practices; developing Agency privacy policies, procedures, and forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

Baptist Health System (2002). As the Senior Healthcare Data Analyst, Cynthia was responsible for maintaining the database used for timely submissions to JCAHO for the four hospitals that were part of the Baptist Health System.

Children's Health System (1981 to 2000). As the Medical Practice Manager for Children's Health System (formerly Physicians to Children/Central Alabama Children's Specialists), Cynthia worked closely with nursing and medical staff, including preparation and execution of regulatory guidelines and documentation required for CLIA, OSHA, and JCAHO accreditation.

Licensed Practical Nurse (1977 to 1981). Cynthia began her career as an LPN for Jackson Hospital and Clinic, and later for James R. Beshear, MD, in Montgomery Alabama, for four years.



Dorothy Ball, BA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Independent Consultant with BerryDunn since 01/2009
Years of Experience Relevant to Proposed Role:	20+
Certifications and Education:	MA, Government, International Relations – Latin American Development, Public Policy Studies, and International Terrorism, New Mexico State University BA, Government – Public Policy, Political Psychology, and International Relations, New Mexico State University Six Sigma Green Belt ESRI Geographic Information System (GIS) Technology Certification Agency for Healthcare Research and Quality's (AHRQ) Knowledge Transfer (KT)/Implementation program - State Healthcare Policy Program Certification. State of Texas, Secondary Education Certification AIDS Education and Training Centers Train the Trainer Educator Certification Centers for Disease Control (CDC) Public Health Advisor Certification

Overview

Dot is a senior consultant with over 30 years of professional experience working in state and Federal government, non-profit and for-profit health services, healthcare policy, health information technology, clinical and direct service health care business, medical business management, professional education, and online education technologies. She is an experienced public policy expert, business operations, and regulatory analyst with subject matter expertise in Healthcare Reform – Affordable Care Act, Health Information Technology (HIT), Health Information Exchange technology and governance structures, Medicaid business process modeling, MITA, regulatory compliance and quality, HIPAA, health professional workforce training and eLearning technologies. She participates in state and national healthcare transformation initiatives including health reform, Health Level 7 (HL7), Medicaid



Information Technology Architecture (MITA), National Health Information Network (NHIN), Electronic Health Records Adoption (EHR), and Health Information Exchange (HIE) projects and workgroups.

Relevant Experience

POGIS (06/2009 to present). As principal consultant for this small veteran-owned analytics and subject matter consultancy, Dot focuses on providing services in the areas of health IT, healthcare delivery systems, and government-funded health and human services. She has worked in collaboration with BerryDunn on the following projects:

- Business Analyst/Subject Matter Expert supporting the Certification team for the West Virginia West Virginia DHHR Data Visioning & Warehouse Request for Proposal (RFP) Development and Procurement Assistance Project (09/2018 to present)
- Business Analyst / Subject Matter Expert supporting the Deliverables Review team for the West Virginia Project Management Services on the West Virginia Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 to present)
- MITA Subject Matter Expert/Analyst for West Virginia's MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 to present)
- Policy Analyst and Affordable Care Act subject matter expert for West Virginia Bureau for Medical Services State of West Virginia Medicaid Enterprise Gap Analysis and Project Management Services (GAPMS) Project (11/2016 to 03/2018)
- Business Analyst / Subject Matter Expert supporting the Arizona Health Care Cost Containment System (AHCCCS) Testing Experience and Functional Tools in Community-Based Long Term Services and Supports (TEFT) Grant PHR Assessment project (7/2014 to 09/2014)
- Business Analyst for the development of West Virginia's State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 to 10/2010)
- Business Analyst for the development of Massachusetts State Medicaid Health IT Plan and EHR Incentive Payment Program (10/2010 to 01/2011)
- Lead Policy Analysis for the West Virginia DHHR Affordable Care Act Compliance and Implementation Project (05/2010 to 12/2013)
- Subject Matter Expert providing eLearning content development for the West Virginia ePrescribing training program for physicians (06/2009 to 12/2009)



In addition, she has served as Lead Policy Analyst for Alabama's Medicaid Managed Care External Quality Review project; MITA Subject Matter Expert for AHCCCS and State of New Mexico Human Services Department MITA 3.0 SS-A; State of New Mexico Human Services Department National Human Services Interoperability Architecture (NHSIA) assessment; Policy Manager as part of an IV&V team for Arizona's Health Insurance Exchange Implementation (dates); and Policy Analyst for business intelligence projects in various states, including Arizona, Utah, New Mexico, Illinois, New Hampshire, Florida, Arkansas, and Texas.

Consulting Projects include:

- **Lead Analyst: New Mexico MMIS Replacement Project – Medical Assistance Division (MAD) MITA State Self-Assessment (SS-A) and Child Support Enforcement National Human Services Interoperability Architecture (NHSIA) assessment prepared for the State of New Mexico Human Services Department (HSD).**
- **Policy Manager: Arizona Health Insurance Exchange (HIX) IV&V**
- **MITA Subject Matter Expert/Business Analyst: Arizona Health Care Cost Containment System (AHCCCS) MITA 2.0 and 3.0 SS-A.**
- **Policy Analyst: Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application.**
- **Lead Policy Analyst: West Virginia Bureau of Medical Services (BMS) Affordable Care Act (ACA) Compliance and Implementation Project.**
- **Lead Policy Analyst: Alabama Medicaid Managed Care External Quality Review (EQR) project.**

FourThought Group, Inc. (08/2002 to 05/2009). As senior business analyst, Dot provided policy analysis, regulatory analysis, business process analysis, and change management for state health and human services agencies, including work on the following projects:

- **Business Analyst for the Arizona Health Care Cost Containment System (AHCCCS) MITA Analysis Project.** Performs business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, develops As Is and To Be Assessments, data collection surveys, documentation review, plans and facilitates validation sessions, performs quantitative and qualitative gap analysis and documentation, develops solutions transition and sequencing plan MITA strategic Roadmap.



- Lead Business Analyst for AHCCCS Fee for Service Management Division (FSM) MITA Assessment managed MITA business analysis team.
- Lead Business Analyst for AHCCCS and Department of Economic Security (DES) to initiate Phase I of the State of Arizona Technology Interface Project System (TIPS).
- Lead Business Analyst managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third Party Administrator Transition and System Implementation project managed requirements development team.
- Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS), member of HIPAA privacy policy compliance team assessments.
- Lead Business Analyst Indiana MITA Analysis project. Performs business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, develops As Is and To Be Assessments, web enable documentation request surveys using Survey Monkey, plans and facilitates validation sessions, and documentation review, develops solutions transition and sequencing plan MITA strategic Roadmap.
- Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development and Implementation project.
- Senior Policy Analyst for South Dakota HIPAA Security Policy and Procedures compliance project. Performs policy and procedures gap analysis of existing Department and State Information Technology authority documentation.
- Business Analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework. This was among the first MITA assessments performed.
- Policy Analyst providing support to the Centers for Medicare and Medicaid Services (CMS) Medicaid Information Technology Architecture (MITA) Initiative Team. Provides policy guidance for the development of MITA Business Model and MITA Assessment tools. Participates in MITA framework development workgroups and MITA Medicaid Management Information System (MMIS) reshaping efforts including HL7 Financial Management workgroup. Familiar with most aspects of the framework and technical specifications.
- Business Analyst/Subject Matter Expert for Washington State Medicaid MMIS procurement project.



New Mexico Health Policy Commission (03/2000 to 08/2002). As senior policy analyst, Dot was responsible for the management of state policy and planning projects addressing access to healthcare, including:

- Managing task force activities and studies, including Medicaid cost containment, prescription drug access, provider retention issues, workforce shortages, health professional regulation, and rural and immigrant access to healthcare
- Managing population survey and data analysis projects that resulted in significant legislative changes
- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues, managed care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues
- Analyzing and interpreting state and federal laws and regulations
- Analyzing health care legislation and providing technical support to the state legislature, governor, and the New Mexico delegation to the U.S. Congress
- Developing data collection tools and survey instruments
- Conducting comparative health data analysis
- Responding to legislative requests and mandates

Rio Bravo Therapy Services (08/1996 to 11/1999). As development director, Dot managed agency development activities, including financial and program development, service delivery, business management budget, and board development activities for a full-service physical/occupational rehabilitation center.

Southwest AIDS Services (01/1992 to 04/1994). Dot was responsible for overall agency management activities, including programs, boards, staff, and general operations for a full-service, multi-county nationally recognized AIDS support services organization.

New Mexico Department of Health (09/1989 to 01/1992). As disease prevention specialist, Dot conducted state public health infectious disease surveillance activities, including epidemiological investigations, case management, and data analysis; clinical and disease management quality assurance policies and protocols; and border health policy studies for the New Mexico Legislature.



Chris Davis, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since 08/2017)
Years of Experience Relevant to Proposed Role:	15+ years
Certifications and Education:	MA Candidate, Public Management, Johns Hopkins University BA, Political Science, The Ohio State University AA, General Studies, Lakeland Community College Prosci® Certified Change Practitioner

Overview

Chris is a Manager with BerryDunn's Medicaid consulting practice, with a focus on policy and independent verification and validation. He has experience working within state government, including serving as an intern with the Ohio State House of Representatives.

Relevant Experience

BerryDunn (08/2014 to present). As a senior consultant in BerryDunn's Medicaid practice, Carolyn works on the following projects.

- **Ohio Department of Medicaid (ODM) – Ohio Medicaid Enterprise System (OMES) IV&V Services (08/2017 to present).**
ODM is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn is providing IV&V support. Chris serves as a senior consultant on the project, helping to provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole.
- **Missouri Department of Social Services – Missouri Medicaid Enterprise (MME) PMO Engagement (05/2018 to 06/2018).**
Chris provided federal certification and IV&V services subject matter expertise on the MMIS Procurement and Replacement Program Project Management Services project. For this project, Chris served as part of the team that is providing project management



services for the MO HealthNet Division (MHD) Business Intelligence Solution/Enterprise Data Warehouse Solution and Program Integrity Solution implementations.

- **New Hampshire Department of Health and Human Services (DHHS) – MMIS and Fiscal Agent Services Assessment and Strategy Project (05/2018 to 06/2018).** Chris provided federal regulatory and certification subject matter expertise on the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, Chris served as part of the team that is assessing the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards, and developing potential MMIS re-procurement options for the State to consider for the future.

Ohio House of Representatives (12/2016 to 07/2017). As a congressional intern, Chris assisted in the research for and drafting of position papers of policy initiatives for a democratic member of the Ohio House of Representatives. He drafted speeches, questions, and policy talking points for committee meetings and public events; created coordinated constituent outreach plans by identifying policy areas and interested parties; drafted press releases for issuance through relevant media outlets including both traditional and social media platforms; and tracked legislation in key policy areas and identifies House members for bipartisan legislative efforts.

Progressive Corporation (05/2008 to 12/2016). Chris served as a member of the contact center leadership for Progressive, ensuring the efficient operation of the contact center and team environments. This included implementing new department and company policies and procedures, implementing new technology, identifying trends in customer relations for the purposes of providing feedback to company leadership to better overall customer experience, identifying areas of opportunity for contact center representatives and provides real time feedback, and providing technical expertise and assistance to contact center representatives to ensure consistency and accuracy in a highly regulated environment. In addition, he served as a technical and situation expert for team members and peers within direct reporting department.



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</p> <p>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 system implementations, QA, 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).



- **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 (APD) Assistance (05/2018 to present).*
Dawn currently assists with the implementation and update of APDs 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).
 - *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



Mo Maitland. BA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 01/2018)
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Political Science and International Affairs, Mary Baldwin University

Overview

Mo is a senior consultant with BerryDunn's Medicaid consulting practice. She is a skilled strategic planner with proven ability to create and manage a results-oriented team. She has experience in clear, effective business communications and capacity building, is well organized and thorough in research, and passionate about creating innovative solutions and effecting change in the community.

Relevant Experience**BerryDunn (01/2018 to present)**

- **West Virginia Bureau for Medical Services (BMS) – State Plan Review and Support (SPRS) Project (06/2020 to present).**
Mo drafted and delivered a project charter to the SPRS team to help guide internal team relations. Mo has collaborated with SPRS team to draft a new and improved State Plan process. As a business analyst, Mo supports deliverable development, conducts research on federal and state guidance, and performs compliance gap analysis across Medicaid policies. Mo helps to ensure BMS has a comprehensive collection of the West Virginia Medicaid State Plan and assists BMS in its transition to the Medicaid and CHIP Program (MACPRO) portal and other enhanced State Plan updates.
- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (01/2018 to 05/2020).**
Mo supported project activities related to the new West Virginia Integrated Eligibility Solution (IES), now the West Virginia People's Access to Help (WV PATH), to consolidate and integrate DHHR program service systems into a single enterprise. As a project coordinator, Mo assisted the requirements, design (configuration), testing and the certification and compliance teams. Mo played an integral role in the process of updating and monitoring the action items from the configuration and design workshops. As



business analyst, Mo supported the testing and the certification and compliance teams to write clear test scenarios to improve the User Acceptance Testing (UAT) process. Mo also collaborated with the WV PATH Deputy Project Manager to help ensure the timely update and submission of the WV PATH Readiness Assessment report on a monthly basis. Mo supported the project team to improve and maintain efficient communication practices between the client, vendor and other key project stakeholders. Mo collaborated with the DHHR and Optum (a UnitedHealth Group company) to help drive a successful implementation of the IES system.



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.



Meghan Crown

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since 07/2020; subcontractor to BerryDunn since 10/2019)
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	BS, Business Administration, West Virginia University College of Business & Economics

Overview

Meghan is an accomplished business analyst, with experience including data analysis and presentation. She is a skilled project coordinator, proficient in organization and interpersonal communication. She is a disciplined and driven team leader, with experience in management and marketing.

Relevant Experience**BerryDunn (10/2019 to present).**

- **West Virginia Bureau for Medical Services (BMS)**
 - *Data Improvement Project*
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project*
 - *Mountain Health Promise (MHP) Implementation Project Management Support*
 - *Provider Management Support for COVID-19*
 - *State Plan Review and Support Project*
 - *Third Party Liability Options Analysis Project*
- **West Virginia Children's Health Insurance Program (WVCHIP) – Eligibility Transition Project.**
- **West Virginia Department of Health & Human Services (DHHR) – People's Access to Help (PATH) DDI Project Management**



Marriott International (2017 to 2019). With Marriott, Meghan worked in both operations management and sales and marketing. She participated in industry analysis, event organization, data analytics for revenue management, and relationship management between departments and clients.

Hospitality Innovation Technology Lab (2018 to 2019). As a research assistant, Meghan was responsible for demonstrating and selling technologies to industry and academic professionals. She participated in collecting and analyzing research for clients, and helped to recruit new students and investors into our program and products.

Fresh Hospitality (2018). While part of the Food and Beverage Management Program, Meghan helped to plan and host events, marketed events, designed an eco-initiative for West Virginia University's enrollees, and completed the ServSafe Managerial certification test.



Sarah Vintorini

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since 08/2020; subcontractor to BerryDunn since 11/2019)
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Degree in Business Administration/Marketing, West Virginia State University

Overview

Sarah brings extensive experience in project coordination and support, including scheduling, decision making, attention to detail, and meeting minute creation and transcription.

Work Experience**BerryDunn (11/2019 to present)**

Sarah began with BerryDunn as a subcontractor before transitioning to a full-time employee in August 2020.

West Virginia Governor's Highway Safety Program (2013 to 10/2019). Sarah currently serves as a corporate event planner for the West Virginia Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities have included securing over \$150,000 annual sponsorships, a tradeshow of over 30 vendors from across the country, securing nationally acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event. Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She has utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

KISRA (2012 to 2018). Sarah oversaw all marketing, communications, and special events for one of the state's largest non-profit organizations. Her responsibilities included internal and external communications, sponsor requests, reports to funders, and meetings with funders and stakeholders. In addition, facilitated various program level strategic planning sessions and



carried out the implementation of each plan, creative implementation of grant funds, and more. She held numerous committee and program meetings that required planning, organizing, capturing meeting minutes, and timely follow-up after each.

Terrell Ellis & Associates (2003 to 2007; 2009 to 2012). As a senior program manager, Sarah managed a variety of nonprofit and governmental accounts providing services including but not limited to fundraising, marketing and outreach activities, meeting facilitation, grant writing and special events. She was responsible for seeking out and securing new clients, client relations, sales, fundraising, strategic planning, meeting facilitation, grant writing, and special events.

The Salvation Army (2001 to 2003). Sarah served as the director of all communications for one of the state's largest social service agencies. Her responsibilities included securing earned media from print, television, and radio, developing all marketing and outreach materials, implementing a successful Christmas Bell Ringing Campaign, a Capitol Campaign, donor and stakeholder relations, community outreach, and more.



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

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.



Caitlin Poling

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since 06/2021
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Associate in Arts Degree, emphasis in English, West Virginia University Parkersburg IJAHP Ophthalmic Assistant Certification 08/2017

Overview

Caitlin has extensive knowledge of insurance billing, coding, prior authorizations, and step therapies and claims submission requirements. She has proficiency with Microsoft office systems such as PowerPoint, Excel, Outlook, and Word. She has, with heavy documentation and note taking experience. Caitlin has 6 years' experience documenting detailed and concise information both in the insurance and clinical practice settings, including updating appropriate HIPAA compliant scripts, forms, and correspondence. She has the ability to remain focused and organized, even under pressure and in regards to meeting deadlines and is an exceptional multi-tasker, able to handle multiple phone lines, computer navigation, and discussion simultaneously.

Relevant Experience**TEKsystems (06/2021 to present).**

Caitlin provides project coordination and support, including scheduling, decision making, attention to detail, and meeting minute creation and transcription.

Mountain State Eye Associates (04/2017 to present)

Caitlin is a certified associate providing direct assistance to MDs and ODs in a busy ophthalmic practice whose providers diagnose and treat ocular diseases, provide minor in-office surgical procedures, and prepare patients for cataract surgery. She performs extensive, thorough patient histories. This position involves heavy documentation/note taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, and checking visual acuity, visual field testing, checking intraocular pressure and administering ophthalmic medications to patients.



She works directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assists in providing cost-reducing programs to patients; provides patients prescriptions through e-prescribing and via telephone and fax; arranges pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required timeframes. Caitlin provides scheduling support and patient flow management; helps ensure all patients have updated, accurate HIPAA compliant registration forms on file and that all EMR systems reflect correct patient information. She assists with administrative, clerical, patient service, and operational support duties daily.

PacificSource Health Plans (09/2015 to 11/2015)

As a provider support technician, Caitlin assisted provider support representatives in accurately entering and maintaining all provider data in the PacificSource database, including heavy documentation, note taking, and frequent client facing. Caitlin investigated issues by obtaining and/or coordinating information from other PacificSource departments or external sources. She maintained provider updates received from returned provider mail, provider OnBase queues, and Provider Network Support e-mail queue daily; recorded, maintain, and changed provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

Wal-Mart Supercenter (08/2014 to 09/2015)

Caitlin was an associate providing remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries in person and via telephone and followed proper procedure for handling claims. Caitlin was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly labeled and priced and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.

Highmark WV BCBS (10/2012 to 07/2014)

As a member services representative-senior markets, Caitlin provided quality customer care for MAPDs and PDPs in accordance with HIPAA regulations and managed a high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and providers.

This position included heavy documentation/note taking, she processed premium payment transactions; worked with providers and claims processors to help ensure claims processed correctly according to member benefits for direct pay and dedicated employer group members; and helped identify issues with benefit tools/resources. She appropriately handled or transferred



members in need of assistance outside our area or to file complaints and handled general correspondence and internet inquiries in a timely, efficient manner.

In this position, Caitlin gained knowledge of insurance processes, claim filing, Medicare systems, first call resolution measures, and Microsoft Office programs. SQM First call Resolution Group world-class calls certified. She assisted in developing scripts for representatives to follow during live member calls and assisted in taking meeting minutes and helping to organize information to be delivered to associates involved with special projects.

Brass Pineapple Bed & Breakfast (01/2012 to 10/2012)

As a part-time innkeeper, Caitlin assisted the owner in running a successful and hospitable bed and breakfast by greeting local and international guests and processing transactions; organizing events; preparing food daily; marketing; and keeping the historic home well-maintained and clean.

Wal-Mart Supercenter (05/2009 to 01/2012)

As a cashier Caitlin provided excellent customer service by ringing up purchases; assisting customers in locating/learning about merchandise, processing returns/exchanges; cashing government and payroll checks; and keeping front end clean, well-stocked and free of hazards. Caitlin assisted other departments in working freight; coordinated special projects, including a sustainability plan to implement proper recycling procedures.



Jonathan Watkins

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since 11/2021
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Criminal Justice, West Virginia University at Parkersburg

Overview

Jonathan is a Project Coordinator with BerryDunn with a history of working in high pressure, fast paced roles that require attention to detail, precise communication and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors.

Experience

CAMC Hospital (January 2021 to November 2021). Jonathan worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing and customer service. In addition, he organized the day to day needs of the unit and performed basic bookkeeping duties.

Greenhills Country Club (May 2016 to January 2021). Jonathan worked in administration to schedule and organize golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day to day bookkeeping duties, and invoicing.

Jackson County 911 (January 2020 to December 2020). Jonathan worked as a dispatched to receive and dispatch all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



Melinda Trail

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

Overview

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

Relevant Experience

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

- **West Virginia Department of Health and Human Services**
 - *Medicaid Enterprise Data Solution (EDS) Procurement Assistance, Implementation, and the Centers for Medicare & Medicaid Services (CMS) Certification Project (1/2020 to present).*

Melinda brings experience with project management, supporting the EDS Procurement Assistance, Implementation, and Certification project with business analysis, project coordination, and project management tasks. She is responsible for overseeing the meeting management duties, capturing detailed meeting notes, tracking action items, and maintaining the information in the data repository to help provide an organized project layout. Melinda also supports the EDS project as a business analyst for the BerryDunn Outcomes-Based Certification (OBC) team through activities such as strategic planning and peer reviewing OBC Worksheets to help ensure the mapping of the OBC evaluation criteria is in scope with the Request for Proposal (RFP) requirements.
- **West Virginia Bureau for Medical Services (BMS)**



- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2018 to present).*

Melinda provides experience with project management, supporting the MITA 3.0 SS-A Maintenance and Annual Update Assistance project through a variety of activities related to business analysis, project coordination, and project management. She is responsible for overseeing the meeting management duties, updating monthly status reports, capturing detailed meeting notes, tracking action items, and maintaining the information in the data repository, West Virginia MITA Database, and the MITA Management Portal (MMP) SharePoint site, which stores and tracks required MITA documents for current and past assessments. Currently, Melinda and the BerryDunn team are providing project management services to meet the objective of the MITA 3.0 SS-A Annual Update for Federal Fiscal Year (FFY) 2019 by assisting DHHR with MITA life cycle maintenance activities, including updating the Health Information Technology (HIT) Companion Guide, updating MITA SS-A related reports, assisting the BMS workgroup with the development of the revised Aged and Disabled Waiver (ADW) business process flow, and training efforts to support activities related to the annual MITA SS-A update.

- *West Virginia Enterprise Project Management Office (EPMO) – COVID-19 Emergency Support Services Sub-Project (4/2020 to 9/2020)*

Melinda brought her experience with project management supporting the West Virginia EPMO project through business analysis, project coordination, and project management tasks. She effectively captured detailed meeting notes, tracked action items and decisions, scheduled meetings, and provided data analytic support. She and the BerryDunn team completed market research and facilitated demonstrations of innovative contact-tracing software solutions; collaborated with state leadership to develop an organizational structure for COVID-19 contact tracing; and oversaw the implementation and integration of the selected contact-tracing software solution. Melinda actively supported and participated with the BerryDunn team as they worked directly with state leadership from the Bureau for Public Health (BPH), the Bureau for Behavioral Health (BBH), the Office of Management Information Systems (OMIS), the DHHR Secretary's Office, as well as stakeholders from a 55-county localized public health system. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software.

- *Substance Use Disorder (SUD) Waiver Initiative Project (04/2020 to present)*
Melinda provides experience with project management supporting the SUD



Waiver initiative project as a project coordinator. She is responsible for overseeing the meeting management duties, updating monthly status reports, capturing detailed meeting notes, tracking action items and decisions, and maintaining the information in the data repository resulting in an organized project layout. Melinda provides data analytic support for the SUD Waiver project by conducting research for deliverable reports. As part of the BerryDunn team, she also assisted BMS to update the Peer Recovery Support Specialist (PRSS) section of the SUD Policy Manual, which included the State certification criteria and allowed for an Ethics and Appeal Board through BMS.

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to present)*

Melinda provides experience with project management supporting the MCO EDQ project through business analysis, project coordination, and management tasks. She effectively captures detailed meeting notes, tracks action items and decisions, schedules meetings, and provides data analytic support for research assignments. Melinda has contributed to the research for the EDQ Best Practices document and assisted the BerryDunn team with technical writing to complete the EDQ Strategy Roadmap.

- *Electronic Visit Verification (EVV) Solution Implementation Project (12/2018 to 07/2019)*

Melinda brought her experience with project management as she supported the EVV Solution Implementation Project as a business analyst for the BerryDunn Certification team. The Certification team was focused on the strategic planning and procurement related services needed to assist BMS in the implementation of their EVV solution. As part of the Certification team, Melinda assisted the State by facilitating and gathering RFP specifications and mapping the CMS Medicaid Enterprise Certification Toolkit (MECT) Checklist to the RFP requirements, requirements traceability, and requirement descriptions. The mapping included over 1,300 requirements, which were mapped to 6 CMS MECT Checklists, 10 MITA Business Areas, 80 MITA Business Processes, and 3 MITA Architectures, to determine if the RFP requirements were in scope with the certification criteria in the CMS checklist.

- *Data Visioning and Warehouse Development and Procurement Assistance Project (07/2018 to 12/2018)*

Melinda provided experience with project management as she supported the Data Visioning and Warehouse Development and Procurement Assistance Project as a



business analyst for the BerryDunn Certification team. The Certification team was focused on the strategic planning and procurement related services needed to assist DHHR in the development of an RFP for a DHHR EDS. As part of the Certification team, Melinda assisted the State by facilitating and gathering RFP specifications, and mapping the CMS MECT Checklist to the RFP requirements, requirements traceability, and requirement descriptions. The mapping led to a development of a Requirement Traceability Matrix (RTM) inventory of over 1,400 specification and 65 mandatory requirements, which were mapped to 8 CMS MECT Checklist, 10 MITA Business Areas, 80 MITA Business Processes, and 3 MITA Architectures, to determine if the RFP requirements were in scope with the certification criteria in the CMS checklist.

- *Mountain Health Trust (MHT) MCO Procurement Assistance Project (1/2020 to 9/2020)*

Melinda's experience with project management supported the MHT MCO Procurement Assistance project through business analysis, project coordination, and management tasks. She effectively captured detailed meeting notes, tracked action items and decisions, scheduled meetings, managed the local document repository, and provided data analytic support for research assignments. Upon completion of procurement activities, Melinda and the BerryDunn team assisted the State with technical implementation meetings with the MCOs and key stakeholders, completed an Implementation Roadmap and Plan, and developed a Value-Based Purchasing (VBP) and Alternative Payment Model (APM) Program Development Plan.

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

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



Compensation claims, and updating claim file databases with Workers Compensation and Federal Black Lung case information.

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

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



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.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, the State PMO will develop and deliver a status report to the WV DHHR BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
2	Monthly Status Report	On a monthly basis, the State PMO will develop and deliver a status report to the DHHR Executive Steering Committee. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
3	Meeting Facilitation, Materials, and Notes	In support of project-related meetings, BerryDunn will supply meeting facilitation, materials, and notes in all BerryDunn-owned meetings. Assistance with meeting facilitation, materials, and notes outside of meetings that BerryDunn did not schedule will require approval by the DHHR project sponsor and the BerryDunn Project Manager.
4	Project Logs (action item, risk, issue, and decision logs)	BerryDunn will develop and maintain project action item, risk, issue, and decision logs for the life of the project. The format, location, and approach to maintaining these logs will be further defined within the Project Management Plan.
5	Status Meetings	BerryDunn will host weekly status meetings with the State and/or Vendor. The frequency of status meetings will vary based on the project's status, the subject at hand, and/or recipient availability.
6	Data Governance Repository	BerryDunn will develop a repository of data governance policies, procedures, and documentation to support key stakeholders and the DGC.
7	Deliverable/Milestone Acceptance Forms	In support of obtaining State approval of finalized deliverables and milestones, BerryDunn will create and



Deliverable #	Deliverable Name	Deliverable Description
		obtain signature approval on each PMO- and Vendor-owned project deliverable and milestone.
8	State-Completed Certification Checklists	BerryDunn will complete the State portion of the Certification Checklists. This includes in-scope/out-of-scope alignment and evidence mapping for OBC.
9	Completed Certification Evidence Packets and Related Artifacts	BerryDunn will populate Evidence Packets for CMS certification. Evidence Packets will provide justification for each mapped criteria.
10	Vendor Performance Scorecard Data	BerryDunn will develop vendor performance scorecard data to identify gaps, as well as to define, communicate, and implement ways to improve relationships with Vendors.
11	APD(s)	An IAPD-U will be developed prior to the close of the FFY, and will contain information necessary for DHHR to request continued federal buy-in and financial backing. BerryDunn will also assist DHHR in the development of the I-APDU; however, the State will maintain responsibility for submission of the document.
12 (Phase I Project Deliverable)	UAT Plan Updates (as needed)	The UAT Plan was developed in Phase I of the EDS Project. The UAT Plan documents the State's approach to UAT of the EDS, including the approach to tracking UAT outcomes, issues, and defects. Updates to the UAT Plan will be developed during Phase II as needed.
13	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The 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	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Certified Master Agreement
CMS	Centers for Medicare & Medicaid Services
CRFQ	Certified Request for Quotations
DAF	Deliverable Acceptance Form
DDI	Design, Development, Implementation
DGC	Data Governance Committee
DHHR	Department of Health and Human Resources
DW/DSS	Data Warehouse/Decision Support System
EDS	Enterprise Data Solution
FFP	Federal Financial Participation
FFY	Federal Fiscal Year
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
KPI	Key Performance Indicator
MITA	Medicaid Information Technology Architecture
OBC	Outcomes-Based Certification
NPI	National Provider Index
OAPD	Operations Advance Planning Document
OMIS	Office of Management Information Services



Acronym/ Abbreviation	Definition
ORT	Operational Readiness Testing
PMBOK®	Project Management Book of Knowledge®
PMI®	Project Management Institute®
PMP®	Project Management Professional®
QA	Quality Assurance
RTM	Requirements Traceability Matrix
SIT	System Integration Testing
SLA	Service Level Agreement
SME	Subject Matter Expert
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
UAT	User Acceptance Training

Teel, Susie M

From: Kirk, Jordan L
Sent: Friday, June 03, 2016 3:44 PM
To: Atwood, Cheryl L; Baber, Marquetta A; Brinegar, Judith A; George, Greg A; Henderson, Sarah E; McClure, Jason E; McGinnis, Debbie Lynn; McQuaid, Connié S; Sexton Haynes, Janese I; Sodder, Alicia D
Subject: FW: Government Agencies - No Registration Requirement

Hey everyone,

I think this might be helpful for each of you regarding SOS registration for other state agencies. Until they reject this, we may be able to attach this to documents regarding these types of vendors. Thanks.

Jordan Kirk
WVDHHR – Bureau for Public Health
Purchasing Director
T: (304) 356-4116
F: (304) 558-1773

From: George, Greg A
Sent: Friday, June 03, 2016 3:42 PM
To: Kirk, Jordan L
Subject: FW: Government Agencies - No Registration Requirement

From: Chad Miller [mailto:CMiller@wvsos.com]
Sent: Friday, June 03, 2016 3:32 PM
To: George, Greg A
Subject: Government Agencies - No Registration Requirement

Government agencies (e.g., *Ohio Department of Agriculture*) is not required to register with Secretary of State. Secretary of State's Office registers "business legal structures" such as:

- Corporation
- Limited Liability Company
- Limited Partnership
- Limited Liability Partnership
- Unincorporated Non-Profit Association
- Voluntary Association
- Business Trust

Regards,

Chad Miller
Workflow Coordinator, Business & Licensing Division

West Virginia Secretary of State
1900 Kanawha Blvd. East



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES

Bill J. Crouch
Cabinet Secretary

Procurement Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301-3712
Telephone: (304) 558-1700 Fax: (304) 558-4398

Cynthia E. Beane
Commissioner

TO: Robert L. Price, CPPB, CPPO, NIGP-CPP
Administrative Services Manager II

FROM: James Atkins II *JA*
BMS Procurement Services

DATE: April 21, 2022

RE: PF1034207, CDO BMS22*31

The West Virginia Bureau for Medical Services (BMS) respectfully requests approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker, LLC under PF1034207, CMA HHR21*03.

The purpose of this delivery order is for the vendor to assist BMS by providing support for the Medicaid Enterprise Data Solution (EDS) Phase II project. The total not-to-exceed cost is \$1,270,330. The service period of this project is 05/09/2022-09/30/2022.

Thank you for your time and consideration in this matter. If you have questions or need additional information, please feel free to contact me at 304-352-4319 or James.W.Atkins@wv.gov.

Robert Price
Agree



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES

Office of Procurement Services

350 Capitol Street, Room 251
Charleston, West Virginia 25301-3712
Telephone: (304) 558-1700 Fax: (304) 558-4398

Bill J. Crouch
Cabinet Secretary

Cynthia E. Beane
Commissioner

DATE: April 22, 2022
TO: DHHR Finance
FROM: James Atkins II *SA-AT*
BMS Procurement Services
RE: Funding Memo for PF1034207 CDO BMS 22*31

The Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced Delivery Order.

BMS anticipates making payments for month 1-5 in SFY23, Contract service period: 05/09/22-09/30/22. Funding allocation table below:

	CDO BMS22*31	
	ARP EDS II	
	5/9/22-9/30/22	
	5 Months	Total:
	PR07 SFY23 5/9/22-9/30/22	
EM	33 Hours @ \$270=\$8,910	\$8,910.00
LPM	58 Hours @ \$215=\$12,470	\$12,470.00
GPM	5,466 Hours @ \$175=\$956,550	\$956,550.00
SS	3,655 Hours @ \$80=\$29,2400	\$292,400.00
	1,270,330.00	1,270,330.00

Thank you for your consideration. If you have any questions or need additional information, please do not hesitate to contact me at 304-352-4319 or at

James.V.Atkins@wv.gov