



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: 05-06-2022

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 BMS2200000036 1	Procurement Folder:	1040226
Document Name:	Out-of-Pocket Maximum Phase II Project	Reason for Modification:	
Document Description:	Out-of-Pocket Maximum 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) 352-4319 Requestor Email: james.w.atkins@wv.gov  <b>22</b> <b>FILE LOCATION</b> _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount: \$277,715.00

Purchasing Division's File Copy

**ENTERED**

CH 5/20/22

PURCHASING DIVISION AUTHORIZATION  
DATE: *Linda Harper 5/23/22*  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION  
DATE: *Beverly Blen 5-23-22*  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Out-of-Pocket Maximum Phase II Project

Dates of Services 05/23/2022 - 10/31/2022

Total: \$277,715.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$6,880.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-23	2022-10-31				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 32 Hours @ \$215 = \$6,880

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$6,480.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-23	2022-10-31				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 24 hours @ \$270 = \$6,480

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$240,275.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-23	2022-10-31				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Sarah Ratliff 127 hours @ \$175 = \$22,225

Crystal Fox 448 hours @ \$175 = \$78,400

Nicole Spears 512 hours @ \$175 = \$89,600

Peter Alfrey 286 hours @ \$175 = \$50,050

Total 1,373 hours @ \$175 = \$240,275

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$24,080.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-23	2022-10-31				

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

Extended Description:  
Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Morgan Krieger 268 hours @ \$80 = \$21,440  
 Caitlyn Cabral, Janine DeLorenzo, Karla Fossett, Carole Ann Guay, Molly Hawkinson, Emily Hendrickson, Bethany Pike, Jordan Ramsey 33 hours @\$80 = \$2,640  
 Total: 301 hours @ \$80 = \$24,080



April 21, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health and Human Resources (DHHR), Bureau for Medical Services (BMS) and the West Virginia Children's Health Insurance Program (WVCHIP) to provide consulting and subject matter expert (SME) services, under our contract (HHR 21\*03). As stated in the WVCHIP and BMS Out-of-Pocket Maximum Phase II Project SOW document, the duration of this work is estimated to be 6 months. BerryDunn agrees to a SOW start date effective on or after May 23, 2022. The work would then conclude on October 31, 2022.

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

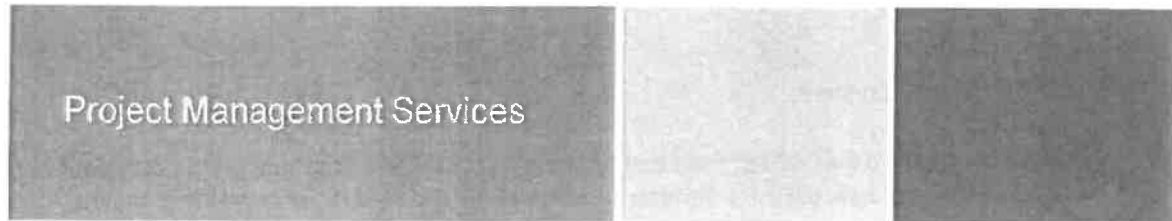
We are pleased to have the opportunity to continue to provide these important services to the State of West Virginia.

Best Regards,

A handwritten signature in cursive script that reads 'Nicole Y. Becnel'.

Nicole Y. Becnel  
Principal  
681-313-8905

Agree  
A handwritten signature in cursive script that reads 'Robert Price'.



**Staffing Plan and Scope of Work for the  
West Virginia Department of Health and Human Resources,  
Children's Health Insurance Program, and Bureau for Medical  
Services Out-of-Pocket Maximum Phase II Project**



**Submitted by:**

Nicole Becnel, PMP®, Principal  
Crystal Fox, Project Manager  
Berry Dunn McNeil & Parker, LLC  
300 Capitol Street, Suite 1610  
Charleston, WV 25301  
Phone: 681-313-8905  
nbecnel@berrydunn.com  
cfox@berrydunn.com

**Submitted on:**

April 21, 2022



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## **Document Purpose**

This document intends to help ensure a common understanding of expectations as they relate to the deliverables and services provided to assist the West Virginia (State) Department of Health and Human Resources (DHHR), Bureau for Medical Services (BMS) and Children's Health Insurance Program (WVCHIP), for the BMS and WVCHIP Out-of-Pocket Maximum Phase II Project.



## 1.0 Key Information

This project will help monitor BMS and WVCHIP's cost-sharing obligations and service-level agreements of the Mountain Health Trust (MHT) managed care organization (MCO) contract. This project will also help BMS and WVCHIP monitor the maximum co-payment amounts during a benefit year for Medicaid and WVCHIP members. The objective of this project is to support BMS and WVCHIP in:

- Developing a Day 1 solution monitoring transition plan, business workflows, and process plans for BMS and WVCHIP
- Improve the State's effectiveness and efficiency
- Minimize risk and maximize value from contracted services and products
- Help ensure program quality
- Improve healthcare outcomes for members
- Help ensure the State's ability to monitor contractor performance against approved measures
- Improve operational efficiency and reduce costs in the healthcare system
- Improve effectiveness and efficiency of the Performance Management function
- Enhance BMS and WVCHIP's ability to analyze the effectiveness of potential and existing benefits and policies

Estimates for this SOW are based on the following assumptions:

- All project documents—including updates on meeting outcomes, action items, issues, risks, and decisions—will be on the BerryDunn Microsoft (MS) SharePoint site.
  - BerryDunn will deliver these documents and project updates to the attention of the BMS and WVCHIP project sponsors.
- BerryDunn will provide deliverables to the State in an agreed-upon format.
- The State leadership team will consist of Sarah Young as the BMS project sponsor; Stacey Shamblin as the WVCHIP project sponsor and WVCHIP project lead; Fred Lewis and Susan Hall as the BMS project leads.
- State staff with the required knowledge base to support the BMS and WVCHIP Out-of-Pocket Maximum Project will attend project-related meetings. If these individuals are not available or do not participate in the fact-finding interview sessions, the project schedule, scope, and cost might be impacted.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.





- DHHR intends to utilize the Medicaid Management Information System (MMIS) Implementation Advanced Planning Document Update (IAPD-U), which requested an estimated \$277,723.00 and includes federal financial participation (FFP) for this SOW. Therefore, any additional scope added to the services provided under this SOW might require that the State update its IAPD-U to allocate additional funds.
- The BerryDunn leadership team will consist of Nicole Becnel, Ed Daranyi, and Sarah Ratliff. Crystal Fox will serve as the project lead.
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for six months.



## 2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Project Initiation and Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's leadership team will meet with the BerryDunn project lead and other key team members regularly to discuss project status and issues affecting the timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> <li>Deliverable 1: Commissioner Briefing</li> </ul> <p><i>Completion Criteria</i></p> <p>Project Initiation and Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.</p>	<p>Nicole Becnel Ed Daranyi Sarah Ratliff</p>	205
2.0	<p><b>Project Execution and Control</b></p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. BerryDunn's leadership team will meet with the project sponsor regularly to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff and services and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> <li>Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings</li> <li>Preparing monthly project status updates, risks, issues, and briefings for the State leadership team</li> </ul>	<p>Sarah Ratliff Crystal Fox Nicole Spears Peter Alfrey Morgan Krieger Caitlyn Cabral Janine DeLorenzo Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson</p>	475



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"><li>Managing project logs (action item, decision, issue, and risk tracking)</li><li>Storing the project documentation repository in an agreed-upon SharePoint location</li></ul> <p><b>Deliverables</b></p> <ul style="list-style-type: none"><li>Deliverable 2: Monthly Status Report</li><li>Deliverable 3: Project Schedule</li></ul> <p><b>Completion Criteria</b></p> <p>Project Execution and Control will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.</p>	Bethany Pike Jordan Ramsey	
3.0	<p><b>Business Requirements</b></p> <p><b>Service Approach</b></p> <p>BerryDunn will assist the State in developing a Day 1 solution monitoring transition plan, business workflows, and process plans for Medicaid and WVCHIP.</p> <p><b>Deliverables</b></p> <ul style="list-style-type: none"><li>Deliverable 4: Out-of-Pocket Ongoing Solution Monitoring Transition Plan</li></ul> <p><b>Completion Criteria</b></p> <p>Business Requirements will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.</p>	Sarah Ratliff Crystal Fox Nicole Spears Peter Alfrey Morgan Krieger Caitlyn Cabral Janine DeLorenzo Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Bethany Pike Jordan Ramsey	922
4.0	<p><b>APD Development</b></p> <p><b>Service Approach</b></p> <p>If additional vendor costs are identified to develop the out-of-pocket maximum solution, BerryDunn will support the State in developing an IAPD-U to be submitted to the Centers for Medicare &amp; Medicaid Services (CMS).</p> <p><b>Deliverable</b></p> <ul style="list-style-type: none"><li>Deliverable 5: IAPD Update</li></ul>	Sarah Ratliff Crystal Fox Nicole Spears Peter Alfrey Morgan Krieger Caitlyn Cabral Janine DeLorenzo Karla Fossett	100



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<b>Completion Criteria</b> APD Development will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.	Carole Ann Guay Molly Hawkinson Emily Hendrickson Bethany Pike Jordan Ramsey	
5.0	<b>Project Closeout</b> 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 Project Closeout Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. <b>Deliverable</b> <ul style="list-style-type: none"><li>Deliverable 6: Project Closeout Summary</li></ul> <b>Completion Criteria</b> BerryDunn services will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS and WVCHIP project sponsors or their designees.	Sarah Ratliff Crystal Fox Nicole Spears Peter Alfrey Morgan Krieger Caitlyn Cabral Janine DeLorenzo Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Bethany Pike Jordan Ramsey	28
Total Hours			1,730
Total Not-To-Exceed Cost Estimate			\$277,715



### 3.0 Project Resources and Hours

The following table includes additional staffing plan details and total hours by resource, based on the hourly rates and staffing classifications listed for Year 1 on the Commodity List for the current contract. BerryDunn used the following roles and rates to compute the costs on 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 Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	24	\$6,480
1	LPM	\$215	Ed Daranyi	32	\$6,880
4	GPM	\$175	Sarah Ratliff	127	\$22,225
4	GPM	\$175	Crystal Fox	448	\$78,400
4	GPM	\$175	Nicole Spears	512	\$89,600
4	GPM	\$175	Peter Alfrey	286	\$50,050
5	SS	\$80	Morgan Krieger	268	\$21,440
5	SS	\$80	Caitlyn Cabral Janine DeLorenzo Karia Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Bethany Pike Jordan Ramsey	33	\$2,640
			Total Hours:	1,730	\$277,715



## 4.0 Project Hours and Costs per Month

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

**Table 3: Estimated Hours per Month by Project Role**

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Total Costs Per Month
Month 1	4	6	229	51	290	\$46,525
Month 2	4	6	229	50	289	\$46,445
Month 3	4	5	229	50	288	\$46,230
Month 4	4	5	229	50	288	\$46,230
Month 5	4	5	229	50	288	\$46,230
Month 6	4	5	228	50	287	\$46,055
<b>Total</b>	<b>24</b>	<b>32</b>	<b>1,373</b>	<b>301</b>	<b>1,730</b>	<b>\$277,715</b>



## 5.0 High-Level Timeline

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

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

Task	1	2	3	4	5	6
1.0 Project Initiation and Engagement Oversight						
2.0 Project Execution and Control						
3.0 Business Requirements						
4.0. APD Development						
5.0 Project Closeout						



**BerryDunn Authorized Signature**

As a principal of this firm in BerryDunn's Consulting Team, 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.

*Nicole Y. Becnel* 2022.04.21  
11:43:15 -04'00'

Signature

Date

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

*FREDERICK S. LEWIS*  
Signature

*APR 26, 2022*  
Date

FREDERICK S. LEWIS





## Appendix A: Resumes

**Nicole Becnel, PMP®**

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

### Overview

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 20 years of experience in Health and Human Services project management experience. Her experience includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

### Relevant Experience

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

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

○ ***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.

○ ***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](http://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.

**Sarah Ratliff, MBA, Prosci®**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager with BerryDunn since 06/2015
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II) MBA, University of Charleston BA, Psychology and Criminology/Investigations, West Virginia University

**Overview**

Sarah is a project and program manager in BerryDunn's Medicaid Practice Area (MPA) with over five years of project management experience in a variety of projects and initiatives, including Medicaid Management Information System (MMIS) design, development, and implementation (DDI), MMIS certification, provider enrollment and management services, and Medicaid Information Technology Architecture (MITA). Sarah is a professional who excels at critical and analytical thinking, team-building, organization, and focused-delivery. Sarah's day-to-day motivation is to deliver quality work products to the client while striving to provide the highest customer satisfaction.

**Relevant Experience**

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

- **West Virginia Bureau for Medical Services (BMS)**
  - *Provider Program Management (06/2019 to present).*

Sarah serves as the program manager for the provider projects under the enterprise portfolio management structure. Sarah provides oversight to the project managers of the projects within the Provider Program including: Provider Management Services (PMS), Electronic Visit Verification (EVV), Access to Care (ATC), and the Electronic Health Record (EHR) Promoting Interoperability (PI) Audit. Sarah works with each of the project teams to help ensure adequate staffing is available throughout the project, project milestones are met, and solutions are reasonable and viable options for the client. Additionally, she provides executive-level communications regarding project progress, risks, issues, and key decisions
  - *West Virginia Children's Health Insurance Program (WVCHIP) Managed Care Organization (MCO) Transition Project (01/2021 to present).*

Sarah serves as the project manager for the WVCHIP MCO Transition project



where she assists the State team in the daily operations and oversight of the MCOs that are transition the WVCHIP fee-for-service population to an MCO-based population. In this role, Sarah communicates with the State and Vendor partners regularly, reviews deliverable documents, analyzes enrollment reports, and facilitates weekly meetings between the organizations. Sarah manages budgets, timelines, and project resources to ensure the project remains compliant with federal and state regulations.

- *EVV Solution Implementation Project (10/2020 to present).*  
Sarah is the project manager for the EVV Solution Implementation project where she manages project documentation including budgets and timelines, and works closely with the client to help ensure project tasks remain on track and in compliance with federal guidelines. Sarah assists the client with outlining new and existing federal regulations that are required to be met through this process. She has led the team through the request for proposal (RFP) development process, successfully evaluated bids, and supported the client as the new vendor, HHAeXchange, was on-boarded. Sarah effectively communicates with the federal partner, CMS, on a regular basis to help ensure the client is remaining compliant with new and existing federal guidance.
- *Third Party Liability (TPL) Procurement Assistance Project (10/2020 to 02/2021).*  
Sarah serves as the interim project manager for the TPL Procurement Assistance project where she assists the client with RFP activities, including coordination of the vendor question and answer process; preparations for the proposal evaluation process, including development of the scoring documentation; and preparations for onboarding the new TPL vendor. Sarah monitors project documentation including budgets, timelines, and deliverable activities, as well as provides the client guidance regarding communications to and from CMS.
- *Enterprise Project Management Office (EPMO) Project (11/2018 to present).*  
Sarah assists with project management tasks and coordination of the overall engagement. Sarah works closely with the client on staffing and project approvals, and assists with managing the tracking of all projects within the engagement.
- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 06/2019).*  
Sarah is currently serving as the organizational change management lead for the EVV implementation project. Sarah works closely with the client to plan,





coordinate, and facilitate bi-monthly stakeholder meetings. Sarah assists with all stakeholder correspondence and communicates with all interested parties on a regular basis.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2017 to 08/2018).*

Sarah served as the project manager for the MITA maintenance and annual update project, managing budgets and project deliverables, and working closely with the client to ensure requirements and expectations are fully met.

- *Provider Enrollment (PEA) Project (01/2017 to 05/2019).*

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

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

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

#### **Kanawha County Sheriff's Office (06/2013 to 05/2015).**

As a legal process clerk, Sarah worked to help organize and prepare official court documents for service by deputies. She also developed monthly reports to determine percentages of official court documents served versus those documents returned; maintained a daily deposit and a monthly deposit roster; effectively developed responses directed to prosecutors and judges; and communicated with the public and directed them to the appropriate official or agency.

#### **Kanawha County Assessor's Office (08/2012 to 06/2013).**

Sarah worked for the County Assessor's Office as a personal property clerk. Her responsibilities included preparing personal property tax tickets for the citizens of Kanawha County; revising existing tax tickets per the Division of Motor Vehicles (DMV) records; and developing and organizing mass mailings of personal property assessment forms.

#### **Publications and Presentations**

*Third Party Liability claims: What state Medicaid agencies need to know*, a BerryDunn blog (10/13/2021)

*The Numbers are in the Data: Finding Value in your TPL Data*, Medicaid Enterprise Systems Conference (MESC) (08/11/2021)



*Medicaid and Children's Health Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools, a BerryDunn podcast (7/22/2021)*

*Partnering in the Modular World, Provider Management & Beyond, Medicaid Enterprise Systems Conference (MESC) (08/21/2019)*



## Crystal Fox

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since 10/2019
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II)

### Overview

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

### Relevant Experience

#### BerryDunn (10/2019 to present)

- **West Virginia Children's Health Insurance Program (WVCHIP)**
  - *Managed Care Organization (MCO) Transition Project (02/2021 to present).*  
Crystal serves as the project manager for the WVCHIP MCO Transition project where she assists the State team in the daily operations and oversight of the MCOs that are transition the WVCHIP fee-for-service population to an MCO-based population. In this role, Crystal communicates with the State and Vendor partners regularly, reviews deliverable documents, analyzes enrollment reports, and facilitates weekly meetings between the organizations. Crystal manages budgets, timelines, and project resources to ensure the project remains compliant with federal and state regulations.
- **West Virginia Department of Health and Human Resources (DHHR)**
  - *People's Access to Help (PATH) DDI Project Management (08/2020 to present).*  
Crystal serves as a project SME for the financial management and Flexi financial module reviews by providing insight on the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.
  - *Child Welfare Initiatives Project Management Services (06/2020 to 08/2020).*  
Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract request for proposal (RFP) for the Bureau for Children and Families' child



placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.

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



Structure (MEOS) subproject by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

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

- **Svc Info Developer III (06/2016 to 06/2019).** Crystal translated business requirements to system functionality; developed use case elaborations and business rules using industry best practices; designed unit test cases to ensure business rules and requirements are being met; managed changes to base lined system requirements using established project change control processes and tools; and wrote SQL queries to validate data and troubleshoot results where applicable.
- **MITA Financial Systems Analyst III (02/2011 to 06/2016).** Crystal worked with teams to analyze business processes. She designed and documented system functionality using industry standard use cases; specialized in all phases of financial processes including, but not limited to; Accounts Payable, Accounts Receivable, General Ledger, Claim Payment, 1099 Processing; and managed changes to system requirements using established project change control processes and tools to include, but not limited to Application Lifecycle Management (ALM).
- **Systems Analyst 5-Financial Analyst (04/2006 to 02/2011).** Crystal created financial reports/processing for clients. She worked closely with the client to understand the business needs and gather requirements/specifications for the project; designed and implemented enhancements/modifications for the HealthPAS-Financial system; performed research and analysis on testing results to ensure accuracy; and resolved production support issues for the HealthPAS-Financials system as needed.

**Nicole Spears, MBA**

<b>Proposed Project Role:</b>	<b>General Project Manager</b>
<b>Role at BerryDunn:</b>	<b>Senior Consultant with BerryDunn since July 2021</b>
<b>Years of Experience Relevant to Proposed Role:</b>	<b>13 years</b>
<b>Certifications and Education:</b>	<b>Bachelor of Science in Corrections, University of Indianapolis</b> <b>Master of Business Administration, focus in Healthcare Management, Western Governors University</b>

**Overview**

Nicole is a senior consultant for BerryDunn's Medicaid Practice Group with deep expertise in healthcare consulting, including Medicaid Management Information System (MMIS) and managed care. With nearly 15 years' experience in change management, Nicole has comprehensive knowledge of Managed Care Organization (MCO) and vendor oversight, program development and implementation, and Software Development Life Cycle (SDLC) monitoring. She has a long history advising senior leadership on high-profile, complex implementations with large, cross-functional teams.

**Experience**

**BerryDunn (July 2021 to present).** Nicole works as a subject matter expert on West Virginia Bureau for Medical Services' Managed Care Encounter Data Quality Project, an assignment focused on supplying project management services to the state to assist with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). This project is also developing an SDLC Coordination Plan to operationalize updates based on state prioritization which will transition to state ownership. She also is currently serving as the SME for the West Virginia Department of Health and Human Resources (DHHR) MES Modernization Strategy project, a project focused on the planning activities for an MES modernization strategy and procurement. The project will plan and estimate implementation costs for a modernized MES and also aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA) goals.

**Gainwell Technologies (December 2017 to July 2021).** Nicole worked as a senior business advisor for the Member Management Module Team as Kansas developed a new modular MMIS. The Member Management Module includes: Member Eligibility, Medicare Management, Eligibility Verification Systems (EVS), and Early and Periodic Screening, Diagnosis, and Treatment (EPSDT). Nicole also led the Business Analysts in the module and produced the end products User Interface (UI) design and security for all subsystems, as well as all system documentation for subsystems (Design Expectations Document, Detailed System Design,



Business Design Documentation, etc.), subsystem certification through the Medicaid Enterprise Certification Toolkit (MECT) and provided expertise for testing for all subsystems (i.e., test plan, results, and defect review).

**SR Advise (January 2016 to December 2017).** Nicole worked as the account manager for SR Advise with the goal of growing business in the public health arena. Nicole developed and implemented company policies and procedures to ensure alignment with client contracts and compliance with government and minority business entity regulations. She developed and managed a new internship program to grow a pipeline for future staffing and cultivated relationships with industry and client leadership to grow the business. Nicole also directed the business development strategy and led Request for Proposal (RFP) responses. Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company. She also served as a senior consultant on several projects providing comprehensive change management services to meet clients' individual business objectives.

**SVC, Inc. (July 2012 to December 2015).** Nicole worked as the operations and MCO SME for the company. Nicole managed high-profile, complex program and system implementations reporting to and advising senior leadership. She assisted in the development of Medicaid pilot programs by identifying potential operational and implementation impacts and proposing best practices. Nicole also identified areas of opportunity and recommended strategies for process improvement for clients' established programs through the consideration of potential impact(s) of policy and program changes on operations and vendors. She led multifaceted system and program changes in the Medicaid Managed Care arena based on these recommendations. Her experience includes RFP development and response, policy manual creation, MMIS DDI communications development, readiness review development, and administration.

**State of Indiana. (July 2008 to April 2012).** Nicole worked as the operations and MCO SME for State of Indiana. Nicole was hired to overhaul the business side SDLC processes for the unit. In this newly established role, she led multiple cross-functional teams while managing system changes impacting Indiana Medicaid, with a focus on vendor system integration. As the Managed Care technical SME with extensive knowledge of MMIS and vendor systems, Nicole helped establish and design the new change control team. This team oversaw scope, ensured requirements and design, served business needs, and provided the opportunity for system integration by giving vendors a voice at the table. This role also oversaw vendor compliance. Nicole directed her staff in executing audits and quality control on MMIS and vendor systems changes, as well as MCO performance reporting. This oversight formed recommendations to the compliance team on corrective actions and performance monitoring. Nicole also served as a policy analyst on the OMPP project to direct project implementation, policy development, and program management of Governor Daniel's 1115 waiver program HIP. She served as the technical resources liaison between vendors and program management with extensive knowledge of the state's Medicaid systems. In this role, she oversaw SDLC and policy impacts for all large initiatives impacting the Managed Care Unit. Nicole also oversaw seven vendors,



which included the development of program manuals, dashboards and on-site review processes to ensure contractual and regulatory compliance of four MCOs.



**Peter Alfrey, PMP, Prosci® CCP, LSSGB**

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

**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 (AVS) Project Management Services and Procurement Assistance (04/2017 to 02/2018).*

Peter served as project manager for the AVS project that supported the State's objective of procuring AVS-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 (GMCB) – 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 GMCB 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 (IV&V) 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***

**Morgan Krieger**

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

**Overview**

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

**Experience****BerryDunn (09/2021 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (09/2021 to present).** *Morgan is a project coordinator for the People's Access to Help (PATH) project. She has a variety of responsibilities, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).*

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

**Capitol Market (July 2019 to November 2019).** Morgan worked as a marketing manager and project coordinator to plan and manage content, graphics, and production of marketing, fundraising, and campaign materials. She wrote and edited compelling communication materials, including internal communications with the board of directors, and external marketing documents, website, and social media, aimed at donors, volunteers, and other external audiences, which entailed heavy documentation. Morgan coordinated the annual signature



event that raised \$75,000 and attracted 150 attendees, helped create, expand and/or coordinate approximately 15 events for donors and/or the general public, and managed day to day operations.

**I Love Nice People, Inc. (August 2016 to January 2020).** Morgan was the Co-Founder of a 501(c)3 non-profit social awareness clothing brand. She handled all documentation / coordination needs and designed a line of ethically-made trademarked apparel and accessories. She directed activities of business pertaining to production, pricing, marketing, sales, and distribution of products while also developing and maintaining an Internet presence through social media and an ecommerce shop

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

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





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**Caitlin Cabral**

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<b>Proposed Project Role:</b>	<b>Project Management Support Staff</b>
<b>Role at BerryDunn:</b>	<b>Editor with BerryDunn since 09/2021</b>
<b>Years of Experience Relevant to Proposed Role:</b>	<b>3 years</b>
<b>Certifications and Education:</b>	<b>Bachelor of Arts in Psychology, University of Hartford</b>

**Overview**

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

**Experience**

**BerryDunn (09/2021 to present).** As a member of BerryDunn's Editorial/QA team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

**QualityMetric (08/2020 to 09/2021).** Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

**University of Hartford's Department of Psychology (01/2019 to 05/2020).** Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.

**True Colors, Inc. (01/2019 to 05/2019).** Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

**University of Hartford's Department of Communication (09/2018 to 05/2020).** Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing



documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.



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## **Janine DeLorenzo**

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

### **Overview**

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

### **Relevant Experience**

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

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

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

- ***Program Coordinator (June 2014 to June 2018)***

Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.

- ***AmeriCorps\*VISTA, Brockton's Promise Coordinator (August 2012 to August 2013)***

Janine coordinated communications and logistics among five committees in a crossector, citywide coalition that addresses youth education, health, safety, and civic



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

- ***AmeriCorps\*VISTA, Brockton Parents Magazine (June 2011 to August 2011)***  
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000 copy distribution via businesses, schools, municipal buildings, and social service agencies.
- ***Stonehill College (August 2010 to May 2011).*** Janine worked as the Student Co-Director of Volunteerism to maintain relationships with over 30 community partners & 600 student volunteers. She designed and led trainings and reflections for the Student Service Leadership team, recruited volunteers, met community partner service needs, arranged logistics, and organized events to promote awareness of local justice issues and service opportunities. Additionally, she tracked volunteerism data for college and national Carnegie reporting.

**Karla Fossett, MFA, Prosci® CCP**

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

**Overview**

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

**Relevant Experience**

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

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

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

**Carole Ann Guay**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since October 2014
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Currently working towards BS in Accounting, University of Southern Maine

**Overview**

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

**Relevant Experience**

**BerryDunn (October 2014 to present).** Carole Ann serves as a project coordinator for BerryDunn's government consulting group, with additional administrative duties. Selected project work includes:

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



Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

- **Minnesota Health Benefit Exchange (MNsure) – Programmatic Audit (October 2015 to present).**

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements.

- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (August 2016 to December 2017).**

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (January 2017 to July 2017).**

Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (April 2017 to June 2017).**

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (November 2014 to June 2017).**

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

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

**Molly Hawkinson**

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

**Overview**

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

**Relevant Experience**

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

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

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



**Emily Hendrickson**

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

**Overview**

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

**Relevant Experience**

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

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

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

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

**Civil Consultants (09/1999 to 07/2014).** As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing and proofreading



proposals, project submittals, and correspondence to clients and governmental agencies; printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

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

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

**Bethany Pike**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since July 2012
Years of Experience Relevant to Proposed Role:	17 years
Education and Certification	Southern Maine Community College

**Overview**

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

**Relevant Experience**

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

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

**Vigilant Capital Management (02/2011 to 05/2012).** As Client Relationship Administrator, Bethany completed new account documentation and assured that assets were received in a



timely fashion; processes gifts of stocks; executed bill paying and beneficiary disbursements; prepared quarterly statements and tax documentation; and maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence.

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

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

**Jordan Ramsey**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor (employed with BerryDunn since 07/2019)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MA, English: Professional Writing, Southeastern Missouri State University BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

**Overview**

Jordan is a senior writer/editor in BerryDunn's Government Consulting Group and team lead of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and holds a MA in English: Professional Writing.

**Relevant Experience**

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

Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content. He also provides new-hire orientations to BerryDunn employees to help them understand the Editorial/QA department's review process and firm style guidelines.

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

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

**Southeast Missouri State University (2015 to 2017).** As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book



reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

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

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

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

**Other Teaching Experience (2006 to 2010).**

- **Lanier Technical College:** As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.
- **Hardin County, IL:** Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.
- **NOVA Group of Japan:** Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	<ul style="list-style-type: none"><li>Monthly status update on the BMS and WVCHIP Out-of-Pocket Maximum Project</li></ul>
2	Monthly Status Report	<ul style="list-style-type: none"><li>Monthly status update</li></ul>
3	Project Schedule	<ul style="list-style-type: none"><li>Schedule for the BMS and WVCHIP Out-of-Pocket Maximum Project</li></ul>
4	Out-of-Pocket Ongoing Solution Monitoring Transition Plan	<ul style="list-style-type: none"><li>Deliverable that will outline how BMS and WVCHIP will monitor the performance of the out-of-pocket solution, and BMS and WVCHIP's transition to use the new tool and monitor household maximum co-payment amounts</li></ul>
5	IAPD	<ul style="list-style-type: none"><li>(If determined necessary by BMS and WVCHIP during the BMS and WVCHIP Out-of-Pocket Maximum Project), APD to be developed in compliance with federal requirements, including—but not limited to—45 Code of Federal Regulations (CFR) 95.610</li><li>Will include an implementation project management approach as part of its submission to CMS</li></ul>
6	Project Closeout Summary	<ul style="list-style-type: none"><li>An inventory of all project documentation and deliverables being transferred to BMS and WVCHIP at the project close</li><li>Documentation of the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member</li></ul>



## Appendix C: Acronyms/Abbreviations

**Table 5: Acronyms/Abbreviations**

Acronym/ Abbreviation	Definition
ACA	Affordable Care Act
APD	Advance Planning Document
BMS	Bureau for Medical Services
CCP	Certified Change Practitioner
CFR	Code of Federal Regulations
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EDS	Enterprise Data Solution
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
EVV	Electronic Visit Verification
FFP	Federal Financial Participation
Gainwell	Gainwell Technologies
HBE	Health Benefit Exchange
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
IES	Integrated Eligibility Solution
MCMP	Medicaid Learning Center Certified Medicaid Professional
MCO	Managed Care Organization
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MLC	Medicaid Learning Center





Acronym/ Abbreviation	Definition
MMIS	Medicaid Management Information System
MS	Microsoft
OBC	Outcomes-Based Certification
OCM	Organizational Change Management
OD	Organization Development
PATH	People's Access to Health
PEA	Provider Enrollment Application
PERM	Payment Error Rate Measurement
PMP®	Project Management Professional®
POS	Point of Sale
QA	Quality Assurance
RFP	Request for Proposals
RFQ	Request for Quotation
SIT	System Integration Testing
SME	Subject Matter Expert
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
SME	Subject Matter Expert
UAT	User Acceptance Training
WVCHIP	West Virginia Children's Health Insurance Program



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 *JAT*  
BMS Procurement Services

DATE: May 4, 2022

RE: PF1040226, CDO BMS22\*36

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 PF ~~103428~~, CMA HHR21\*03.  
785940

The purpose of this delivery order is for the vendor to assist BMS by providing support for the Out-of-Pocket Maximum (OOP Max) Phase II project. The total not-to-exceed cost is \$277,715.00 The service period of this project is 05/23/2022-10/31/2022.

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](mailto:James.W.Atkins@wv.gov)

*Robert Price*  
Agree



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

Bill J. Crouch  
Cabinet Secretary

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

Cynthia E. Beane  
Commissioner

DATE: May 5, 2022  
TO: DHHR Finance  
FROM: James Atkins II *SA-II*  
BMS Procurement Services  
RE: Funding Memo for PF1040226 CDO BMS 22\*36

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

BMS anticipates making payments for months 1-6 in SFY23. Contract service period: 05/23/22-10/31/22. Funding allocation table below:

CDO BMS22*36				
OOP Max II				
5/23/22-10/31/22				
6 Months				
PR07 SFY23 5/23/22-10/31/22				
EM	24 Hours @ \$270=\$6,480	\$6,480.00	\$6,156.00	\$324.00
LPM	32 Hours @ \$215=\$6,880	\$6,880.00	\$6,536.00	\$344.00
GPM	1,373 Hours @ \$175=\$240,275	\$240,275.00	\$228,261.25	\$12,013.75
SS	301 Hours @ \$80=\$24,080	\$24,080.00	\$22,876.00	\$1,204.00
	277,715.00	277,715.00	\$263,829.25	\$13,885.75

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.W.Atkins@wv.gov](mailto:James.W.Atkins@wv.gov)