



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

State of West Virginia Delivery Order

Order Date: 04-25-2022

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

Order Number:	CDO 0511 3839 MIS2200000008 1	Procurement Folder:	1031847
Document Name:	PATH DDI Project	Reason for Modification:	
Document Description:	PATH DDI 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		6-14-2024 <i>Shy</i>

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: Kimberly A Beckett Requestor Phone: (304) 558-5906 Requestor Email: kimberly.a.beckett@wv.gov 22 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE ONE DAVIS SQUARE, RM 211 CHARLESTON WV 25301 US	BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE 321 CAPITOL ST, STE 200 CHARLESTON WV 25301 US

Purchasing Division's File Copy

Total Order Amount: \$25,218,350.00

CH 4/26/22

PURCHASING DIVISION AUTHORIZATION
DATE: *4/29/22*
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION
DATE: *5/2/2022*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

PATH DDI to help ensure a common understanding of expectations relating to the deliverables and services Berry Dunn will provide.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$408,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-04-30				

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:

Lead Project Manager: Base Year One for a total of 1900 hrs.

Hourly Rate: \$215.00

Brandon Milton 1900 hours @ \$215.00=\$408,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$386,100.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-04-30				

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:

Engagement Manager: Base Year One-total of 1430 hrs.

Hourly Rate: \$270.00

Nicole Becnel 1430 hours @ \$270.00 = \$386,100.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$22,485,750.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-09	2024-04-30				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:

General Project Manager: Base Year One for a total of 128,490 hrs.

Hourly Rate: \$175.00

Ed Daranyi: 1190 hours @ \$175.00 = \$208,250.00
 Alex Lyubarov: 3800 hours @ \$175.00 = \$665,000.00
 Crystal Gray: 3800 hours @ \$175.00 = \$665,000.00
 Emily McCoy: 950 hours @ \$175.00 = \$166,250.00
 Alex Tannenbaum: 3800 hours @ \$175.00 = \$665,000.00
 Lorrie Davenport: 3800 hours @ \$175.00 = \$665,000.00
 Marnie Hudson: 3800 hours @ \$175.00 = \$665,000.00
 Agnes Beeks-Smith: 3800 hours @ \$175.00 = \$665,000.00
 Crystal Fox: 3800 hours @ \$175.00 = \$665,000.00
 Richard Moore: 3800 hours @ \$175.00 = \$665,000.00
 Shaun Meeks: 3800 hours @ \$175.00 = \$665,000.00
 Michelle Shores: 3800 hours @ \$175.00 = \$665,000.00
 Sudha Ganapathy: 3800 hours @ \$175.00 = \$665,000.00
 Preethi Kembhavi: 3800 hours @ \$175.00 = \$665,000.00
 Reginald Timmons: 3800 hours @ \$175.00 = \$665,000.00
 Adam Bowman: 3800 hours @ \$175.00 = \$665,000.00
 Neal Winn: 3800 hours @ \$175.00 = \$665,000.00
 Robert Haughton: 3800 hours @ \$175.00 = \$665,000.00
 Milan Kelly: 3800 hours @ \$175.00 = \$665,000.00
 Nora Gilligan: 3800 hours @ \$175.00 = \$665,000.00
 Meghann Slaven: 3800 hours @ \$175.00 = \$665,000.00
 Eugene Horowitz: 3800 hours @ \$175.00 = \$665,000.00
 Buffy Cranford: 3800 hours @ \$175.00 = \$665,000.00
 Michelle Lavalley: 3800 hours @ \$175.00 = \$665,000.00
 Frank Matina: 3800 hours @ \$175.00 = \$665,000.00
 Allison Marler: 3800 hours @ \$175.00 = \$665,000.00
 Dawn Webb: 950 hours @ \$175.00 = \$166,250.00
 Susan Chugha: 3800 hours @ \$175.00 = \$665,000.00
 Sarah Ratliff: 3800 hours @ \$175.00 = \$665,000.00
 Lisa Roberts: 3800 hours @ \$175.00 = \$665,000.00
 Hilary Foster Moles: 3800 hours @ \$175.00 = \$665,000.00
 Patricia Arrechea: 3800 hours @ \$175.00 = \$665,000.00
 Dezaree Moore: 3800 hours @ \$175.00 = \$665,000.00
 Roshani Raghani: 3800 hours @ \$175.00 = \$665,000.00
 Reanna Jones: 3800 hours @ \$175.00 = \$665,000.00
 Katie Weidner: 3800 hours @ \$175.00 = \$665,000.00

Total: 128,490 @ \$175.00 = \$22,485,750.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,938,000.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-09	2024-04-30				

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

Extended Description:

Project Management Support Staff: Base Year One-for a total of 24,225 hrs.

Hourly Rate: \$80.00

Andrew Dornan: 3800 hours @ \$80.00 = \$304,000.00
Payton Waybright: 3800 hours @ \$80.00 = \$304,000.00
Morgan Krieger: 3800 hours @ \$80.00 = \$304,000.00
Caitlin Poling: 3800 hours @ \$80.00 = \$304,000.00
Samuel Kessler: 3800 hours @ \$80.00 = \$304,000.00
Stacie Mayhorn: 3800 hours @ \$80.00 = \$304,000.00
Molly Hawkinson: 142.5 hours @ \$80.00 = \$11,400.00
Bethany Pike: 142.5 hours @ \$80.00 = \$11,400.00
Caitlin Cabral: 142.5 hours @ \$80.00 = \$11,400.00
Carole Ann Guay: 142.5 hours @ \$80.00 = \$11,400.00
Emily Hendrickson: 142.5 hours @ \$80.00 = \$11,400.00
Janine DiLorenzo: 142.5 hours @ \$80.00 = \$11,400.00
Jon Williams: 142.5 hours @ \$80.00 = \$11,400.00
Jordan Ramsey: 142.5 hours @ \$80.00 = \$11,400.00
Karla Fossett: 142.5 hours @ \$80.00 = \$11,400.00
Kyle Melton: 142.5 hours @ \$80.00 = \$11,400.00

Total: 24,225 hours @ \$80.00 = \$1,938,000.00



April 14, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health and Human Resources, Bureau for Medical Services to provide Project Management Organization Services for the West Virginia Medicaid People's Access to Help (PATH), under our contract (CMA # HHR 21*3). As stated in the PATH SOW document, the duration of this work is estimated to be 24 months. BerryDunn agrees to a SOW start date effective May 9, 2022.

Assuming a start date of May 9, 2022, the work would then conclude on April 30, 2024. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

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

Nicole Y. Bechel
Principal
681-313-8905

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

Agree



Project Management Services

**Scope of Work (SOW) for the
West Virginia Department of Health and Human Resources and
Project Management Organization Services for the West Virginia Medicaid
People's Access To Help (PATH) Project
Prepared for CMA # HHR21*03**



Submitted by:

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

Submitted on:

April 14, 2022



**Scope of Work (SOW) for the West Virginia Department of Health and Human Resources,
Bureau for Medical Services for Project Management Organization Services on the West Virginia
Medicaid PATH Project**

This scope of work (SOW) describes the tasks BerryDunn will perform to support the West Virginia (State) Department of Health Human Resources (DHHR) and Bureau for Medical Services with project management and subject matter expertise for the PATH design, develop, and implement (DDI) project. This work will be completed under the terms and conditions of CMA HHR21*03 Project Management Organization Services.

1.0 Key Information

This document intends to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the PATH Project. BerryDunn considered the following information in preparing this SOW.

1.1 General

The State is implementing a new Integrated Eligibility System (IES) called PATH. PATH will replace three existing legacy systems: Recipient Automated Payment and Information Data System (RAPIDS), Families and Children Tracking System (FACTS), and Online Support Collections and Reporting (OSCAR). DHHR has requested that BerryDunn provide project management, deliverable review, testing support, organizational change management (OCM) support, requirements support, certification and compliance support, and general subject matter expertise supporting the PATH DDI project. The following health and human services programs are associated with the legacy systems to be replaced by PATH:

- **RAPIDS** – The primary State DHHR programs supported by the RAPIDS system include Medicaid, the West Virginia Children's Health Insurance Program (WVCHIP), the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance to Needy Families (TANF or WV WORKS), and many other State-operated assistance programs.
- **FACTS** – FACTS is the State Automated Child Welfare Information Systems (SACWIS). FACTS supports the administration and eligibility determinations of the State's social services programs, including Child Care Subsidy and Licensing, Child Protective Services, Adult Protective Services, Residential Licensing, and many other assistance programs.
- **OSCAR** – This system supports the administration of the State's Child Support Enforcement program.



The following provides background information that led to the development of this SOW.

- The Patient Protection and Affordable Care Act (ACA) set in motion a significant transformation in how states determine eligibility for their Medicaid populations and enroll those populations into their Medicaid programs.
- The United States Department of Health and Human Services (HHS) supported this transformation by publishing new rules to allow states to claim 90% federal financial participation (FFP) for development activities related to their eligibility and enrollment (E&E) systems. This was further supported by an exception to the Office of Management and Budget (OMB) Circular A-87.
- On October 28, 2014, the Centers for Medicare and Medicaid Services (CMS) announced an extension to the OMB A-87 exception, which expired on December 31, 2018.
- On December 4, 2015, CMS published a final rule that, among other regulatory changes, indefinitely extended the 90% FFP for development activities related to E&E systems.
- The State developed an Implementation Advanced Planning Document (IAPD) to cover the costs associated with the SOW and the vendor DDI costs for the procurement. The most recent IAPDU was approved with conditions by HHS on September 24, 2021. The IAPDU approval is contingent on the State providing an update to the Data Quality plan by Thursday, December 23 (90 days from ACF's letter of conditional approval).

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- 1) BerryDunn assumes that participating State agencies will make available their staff who have the knowledge base required to inform the DDI as needed. BerryDunn assumes the list of participating agencies will consist of the DHHR Office of the Secretary, the West Virginia Office of Management and Information Systems (MIS), the Bureau for Medicaid Services (BMS), the Bureau for Child Support Enforcement (BCSE), the Bureau of Social Services (BSS), the Bureau for Family Assistance (BFA), the West Virginia Office of Technology (WVOT), and WVCHIP.
 - i. BerryDunn assumes the relevant stakeholders from the agencies listed above will be made available throughout DDI. If these individuals are unavailable or do not participate in the sessions and other related project meetings, the project schedule and outcomes may be impacted.
 - ii. BerryDunn recognizes that agencies beyond those listed above may need to be pulled into the DDI process at specific times to support the effort (e.g., to test interfaces with internal and external systems).



- 3) BerryDunn will support DHHR through IES IAPD processes required by CMS and other federal partners for this SOW. For this SOW, BerryDunn assumed the potential to update the IAPD two times.
- 4) The cost of services and timeline in this SOW requests 24 months during the State's PATH DDI.
- 5) Given the schedule for the work to be completed during this project, this SOW assumes that all federal, state, and vendor project stakeholders will provide timely decision-making and responses for information in support of the PATH DDI. Schedule delays resulting from the action or inaction of federal, State, and vendor stakeholders may impact the overall project schedule and require change requests to help ensure BerryDunn's Project Management Services continue for the duration of the PATH DDI.
- 6) The cost of the services described in this SOW is included in the latest IAPDU submitted to the federal partners with an estimated cost of \$15.421 million combined State and federal share per year. The total estimated cost for BerryDunn's services under this SOW is \$25,218,350 for 24 months. Any additional services added to this SOW may require an update to the States current IAPD to allocate additional funds for project management.
- 7) According to the IES Request for Proposal (RFP), the prime vendor is responsible for the performance of its partners; therefore, BerryDunn will work with the prime vendor to fulfill the services within this SOW. The prime vendor is responsible for ensuring its partners participate as needed to complete the services defined in this SOW.
- 8) The level of effort defined in this SOW is based upon certification of the solution by a select number of federal partners, including CMS, Administration for Children and Families (ACF), Food and Nutrition Services (FNS), and Social Security Administration (SSA).
- 9) The staffing, approach, and level of effort defined in this SOW are based on the requirements outlined within the State's IES DDI RFP.
- 10) This SOW's staffing, approach, and level of effort do not account for the services necessary to fulfill the federal Independent Verification and Validation (IV&V) IES requirements.



2.0 Project Scope

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <i>Service Approach</i> BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables. <i>Deliverable(s)</i> There will be no PMO deliverables supplied in support of Engagement Oversight <i>Completion Criteria</i> All parties will deem Engagement Oversight complete upon signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.	Nicole Becnel Ed Daranyi Dawn Webb Brandon Milton Alex Lyubarov Emily McCoy	7,255
2.0	Monthly Project Status Reporting <i>Service Approach</i> BerryDunn will supply project readiness assessments, and monthly project status reports to BMS, the DHHR project sponsors, and/or the federal partners to provide objective reporting on the health of the project. The details contained within the project readiness assessments are meant to provide the overall health of specific milestones, deployments, and other events. The project status reports are intended to supply higher-level reporting on the status of project deliverables and timeline and associated project issues and risks. The project readiness assessments and project status reports will be developed, reviewed, and finalized during the first two weeks of each calendar month for the life of	Nicole Becnel Ed Daranyi Brandon Milton Alex Lyubarov Crystal Gray Alex Tannenbaum Lorrie Davenport Nora Gilligan Marnie Hudson Agnes Beeks-Smith Gene Horowitz Morgan Krieger	9,348



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>the project.</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> D01 – Commissioner Briefings D02 – Project Readiness Assessments D03 – Monthly Project Status Reports <p>Completion Criteria</p> <p>All parties will deem Project Execution, and Control Monthly Project Status Reporting will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Caitlin Poling</p> <p>Sam Kessler</p> <p>Stacie Mayhorn</p> <p>Bethany Pike</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Janine DiLorenzo</p> <p>Jon Williams</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Kyle Melton</p> <p>Molly Hawkinson</p>	
3.0	<p>Project Management Support</p> <p>Service Approach</p> <p>BerryDunn will provide Project Management Services for the PATH project. Upon project initiation of this SOW, BerryDunn will confirm agreed-upon expectations for the management of the project.</p> <ul style="list-style-type: none"> Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn- and State-owned meetings (as requested) Management of project logs (action items, risks, issues, and decisions) Location of a project documentation repository in an agreed-upon SharePoint location <p>BerryDunn will facilitate weekly meetings with the State project sponsor and project lead to discuss project status across each project area. BerryDunn will use this time to make the State aware of project risks, issues, and/or items that may require its attention. BerryDunn will also use this time to plan risk and issue mitigation and responses.</p> <p>Outputs</p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> Meeting agendas Meeting notes 	<p>Nicole Becnel</p> <p>Ed Daranyi</p> <p>Brandon Milton</p> <p>Alex Lyubarov</p> <p>Crystal Gray</p> <p>Alex Tannenbaum</p> <p>Lorrie Davenport</p> <p>Nora Gilligan</p> <p>Mamie Hudson</p> <p>Agnes Beeks-Smith</p> <p>Gene Horowitz</p> <p>Neal Winn</p> <p>Preethi Kembhavi</p> <p>Sudha Ganapathy</p> <p>Meghann Slaven</p> <p>Payton Waybright</p> <p>Buffy Cranford</p> <p>Dawn Webb</p> <p>Sarah Ratliff</p> <p>Lisa Roberts</p> <p>Hilary Foster Moles</p> <p>Andrew Dornon</p>	42,800



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• Meeting tracking logs• Action item tracking logs• Risks and Issues register• Project decision logs• Weekly workshop and workgroup coverage calendars <p><i>Completion Criteria</i> Project Management Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karia Fossett Kyle Melton Molly Hawkinson	
4.0	<p>Requirements Management Subject Matter Expertise</p> <p><i>Service Approach</i> BerryDunn will provide Project Management Services to support the requirements analysis and system DDI phases of the PATH project.</p> <p>During the requirements analysis, system design, and Implementation phases, BerryDunn will work with the State to review the vendor's proposed solution for requirements included in the RFP (inclusive of proposed gaps). After the requirements review, the project team will work with the vendor to refine and validate the solution for each IES requirement.</p> <p>Throughout the design, testing, and implementation phases of the PATH project, the State and BerryDunn will work with the vendor to clarify and validate the design for each requirement.</p> <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn will assign programmatic and functional track leads to assist the State through the requirements DDI. The track leads will be the State's primary points of contact for each track/focus area and will work with BerryDunn and the</p>	Alex Lyubarov Crystal Gray Alex Tannenbaum Lorrie Davenport Nora Gilligan Mamie Hudson Agnes Beeks-Smith Gene Horowitz Neal Winn Preethi Kembhavi Sudha Ganapathy Meghann Slaven Buffy Cranford Rick Moore Shaun Meeks Crystal Fox Michelle Shores Robert Haughton Milan Kelly Reggie Timmons	19,209



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>vendor to define, clarify, and test the applicable requirements throughout the PATH DDI.</p> <p>BerryDunn will also be responsible for meeting attendance, facilitation, and/or note-taking (when requested by the State) during discussions in which requirements may be impacted.</p> <p>Although the vendor will be responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability matrix (RTM), BerryDunn will be responsible for helping ensure the RTM reflects the State and the vendor's agreed-upon solution.</p> <p>Outputs</p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> • Action item tracking reports • Research summaries (as requested) • Impact analyses (as requested) <p>Completion Criteria</p> <p>Requirements Management Subject Matter Expertise will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Adam Bowman Reanna Jones Andrew Dornon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Kyle Melton Molly Hawkinson</p>	
	<p>Deliverable Management and Review</p> <p>Service Approach</p> <p>BerryDunn will utilize its standardized approach to monitoring and providing management oversight for the quality of project deliverables, artifacts, and other work products submitted by the vendor. BerryDunn's approach will consist of the following elements:</p> <ul style="list-style-type: none"> • BerryDunn will facilitate, track, and manage vendor- and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location. • BerryDunn will develop, review, and finalize deliverable acceptance criteria with the vendor and the State. • BerryDunn will participate in vendor-facilitated draft reviews of contract deliverables (as needed). 	<p>Alex Lyubarov Crystal Gray Alex Tannenbaum Lorrie Davenport Nora Gilligan Marnie Hudson Agnes Beeks-Smith Gene Horowitz Neal Winn Preethi Kembhavi Sudha Ganapathy Meghann Slaven Buffy Cranford Rick Moore Shaun Meeks Crystal Fox</p>	23,500



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
5.0	<ul style="list-style-type: none"> BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements. BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables (as needed). BerryDunn will collaboratively resolve comments on vendor-owned deliverables. BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable. <p>BerryDunn will review vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn will work with the vendor to help ensure deliverables have approved acceptance criteria that the State has validated. BerryDunn will also work with the State and the vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also use the agreed-upon comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments.</p> <p>Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable and milestone through a deliverable acceptance form (DAF).</p> <p>Outputs</p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> Deliverable comment logs Deliverable review tracking logs Deliverable review training materials Deliverable review Responsible, Accountable, Consulted, and Informed (RACI) Matrix <p>Completion Criteria</p> <p>Deliverable Management and Review will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Michelle Shores Robert Haughton Milan Kelly Reggie Timmons Adam Bowman Frank Matina Allison Marler Michelle Lavallee Andrew Domon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Kyle Melton Molly Hawkinson</p>	



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
6.0	<p>Federal Review and Certification Support and (Medicaid Information Technology Architecture) MITA Alignment Services</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Project Management Services support for required federal reviews and certification. This includes assisting the State with developing the approach, process, and methodologies used to manage the project and creating associated deliverables required for federal reviews and certification. BerryDunn will work with the State and the federal partners to identify the documentation needed to assist the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services by scheduling, facilitating, and managing federal on-site visits or reviews.</p> <p>BerryDunn will provide support services to the State by leveraging and reusing the State's existing functionality and processes to prevent unnecessary duplication.</p> <p><i>Outputs</i></p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none">• Certification and Compliance templates• Certification and Compliance approach documentation• Training materials• Research summaries <p><i>Completion Criteria</i></p> <p>Federal Review and Certification Support and MITA Alignment Services will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Alex Lyubarov Crystal Gray Alex Tannenbaum Nora Gilligan Meghann Slaven Rick Moore Shaun Meeks Adam Bowman Frank Matina Allison Marler Roshani Roghani Andrew Dornon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Kyle Melton Molly Hawkinson</p>	15,829
	<p>Testing Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources to assist DHHR with System Integration Testing (SIT), User Acceptance Testing (UAT), Pilot Testing (where applicable), and Operational Readiness Testing (ORT) efforts.</p>	<p>Alex Lyubarov Crystal Gray Alex Tannenbaum Lorrie Davenport Nora Gilligan Marnie Hudson Agnes Beeks-Smith</p>	23,708



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
7.0	<p>Assistance during SIT, UAT, and ORT is outlined as follows:</p> <ul style="list-style-type: none"> BerryDunn will assist DHHR with the review of SIT cases and results. BerryDunn will also support monitoring SIT defects and the impacts on overall project health. BerryDunn will maintain the UAT Plan and assist DHHR in developing UAT test scenarios. BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes and issues and defects identified during this testing phase. BerryDunn will assist DHHR with facilitating and validating the vendor's services as they relate to ORT. BerryDunn will also be responsible for services necessary to assist DHHR in validating that it is operationally ready for the system go-live. <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn's assigned track leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the vendor to define, clarify, and test each requirement's design.</p> <p><i>Deliverable(s) and Outputs</i></p> <ul style="list-style-type: none"> D04 – Updated DHHR UAT Plan SIT test cases, SIT test results, and UAT test case review comment logs UAT templates (e.g., test case scenarios) UAT execution reporting (e.g., overall UAT status, defect tracking) <p><i>Completion Criteria</i></p> <p>Testing Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	<p>Gene Horowitz Neal Winn Preethi Kembhavi Sudha Ganapathy Meghann Slaven Buffy Cranford Rick Moore Shaun Meeks Crystal Fox Michelle Shores Robert Haughton Milan Kelly Reggie Timmons Adam Bowman Frank Matina Allison Marler Michelle Lavallee Patricia Arrechea Dezaree Moore Andrew Dornon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Kyle Melton Molly Hawkinson</p>	



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
8.0	APD Support <i>Service Approach</i> BerryDunn will develop IAPD updates to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners. <i>Deliverable(s)</i> <ul style="list-style-type: none">D05 – IAPD Updates (as needed) <i>Completion Criteria</i> APD Support will be deemed complete upon signature approval of the Project Closeout Summary.	Alex Lyubarov Crystal Gray Alex Tannenbaum Nora Gilligan Shaun Meeks Roshani Raghani Andrew Dornon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karia Fossett Kyle Melton Molly Hawkinson	663
9.0	OCM <i>Service Approach</i> Organizational change is a fundamental component of most system implementations, particularly one of this size. As such, BerryDunn will work with DHHR on developing and implementing a change management methodology that aligns with accepted change management principles. In alignment with a proven methodology, BerryDunn's approach to providing change management in its work with DHHR will occur over the course of three stages: <ul style="list-style-type: none">Preparing for Change begins with developing a Change Management Plan based on input from DHHR leadership and stakeholders regarding the existing environment.	Alex Lyubarov Crystal Gray Alex Tannenbaum Lorrie Davenport Meghann Slaven Buffy Cranford Frank Matina Allison Marler Michelle Lavallee Katie Weidner Andrew Dornon Susan Chugha Morgan Krieger	13,606



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Managing Change involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and exercising clear communication. Reinforcing Change involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes. <p>BerryDunn anticipates that the project's Change Management Plan will be updated as needed.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D06 – Updated Change Management Plan <p><i>Completion Criteria</i></p> <p>OCM Support will be deemed complete upon signature approval of the Project Closeout Summary.</p>	Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Kyle Melfon Molly Hawkinson	
10.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>BerryDunn will prepare a Project Closeout Summary that includes project documentation and deliverables. Additionally, the Project Closeout Summary will document the disposition or reassignment of action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D07 – Project Closeout Summary <p><i>Completion Criteria</i></p> <p>Project Closeout will be deemed complete upon State acceptance and signature of the Project Closeout Summary.</p>	Ed Daranyi Nicole Becnel Dawn Webb Brandon Milton Alex Lyubarov Emily McCoy Crystal Gray Andrew Domon Susan Chugha Morgan Krieger Caitlin Poling Sam Kessler Stacie Mayhorn Bethany Pike Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett	127



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Kyle Melton Molly Hawkinson	
Total Hours			156,045
Total Not-To-Exceed Cost Estimate			\$25,218,350



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for the duration of this SOW for CMA HHR21*03. Please note that the CLs in Table 2 are for year one of the CMA.

Table 2: Project Resources

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Engagement Manager Nicole Becnel	1,430	\$386,100
4	GPM	\$175	Engagement Oversight Ed Daranyi	1,190	\$208,250
1	LPM	\$215	Lead Program Manager Brandon Milton	1,900	\$408,500
4	GPM	\$175	Program Manager Alex Lyubarov	3,800	\$665,000
4	GPM	\$175	Project Manager Crystal Gray	3,800	\$665,000
4	GPM	\$175	Deputy Project Manager Emily McCoy	950	\$166,250
4	GPM	\$175	PMO Manager Alex Tannenbaum	3,800	\$665,000
4	GPM	\$175	SLT Manager Lorrie Davenport	3,800	\$665,000
4	GPM	\$175	Requirements Lead Marnie Hudson	3,800	\$665,000
4	GPM	\$175	Requirements Lead Agnes Beeks-Smith	3,800	\$665,000
4	GPM	\$175	Requirements SME Crystal Fox	3,800	\$665,000
4	GPM	\$175	Requirements SME Richard Moore	3,800	\$665,000
4	GPM	\$175	Requirements SME	3,800	\$665,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
			Shaun Meeks		
4	GPM	\$175	Requirements SME Michelle Shores	3,800	\$665,000
4	GPM	\$175	Testing Lead Sudha Ganapathy	3,800	\$665,000
4	GPM	\$175	Testing Lead Preethi Kembhavi	3,800	\$665,000
4	GPM	\$175	Testing SME Reginald Timmons	3,800	\$665,000
4	GPM	\$175	PMO Lead Adam Bowman	3,800	\$665,000
4	GPM	\$175	Technical Lead Neal Winn	3,800	\$665,000
4	GPM	\$175	Technical SME Robert Haughton	3,800	\$665,000
4	GPM	\$175	Technical SME Milan Kelly	3,800	\$665,000
4	GPM	\$175	Federal Certification and Compliance Lead Nora Gilligan	3,800	\$665,000
4	GPM	\$175	PMO Lead Meghann Slaven	3,800	\$665,000
4	GPM	\$175	PMO Lead Eugene Horowitz	3,800	\$665,000
4	SS	\$80	PMO SME Andrew Dornon	3,800	\$304,000
4	GPM	\$175	OCM Lead Buffy Cranford	3,800	\$665,000
4	GPM	\$175	OCM SME Michelle Lavallee	3,800	\$665,000
4	GPM	\$175	Release Lead	3,800	\$665,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
			Frank Matina		
4	GPM	\$175	Release SME Allison Marler	3,800	\$665,000
4	GPM	\$175	Deputy Project Manager Dawn Webb	950	\$166,250
4	GPM	\$175	PMO SME Susan Chugha	3,800	\$665,000
4	GPM	\$175	PMO SME Sarah Ratliff	3,800	\$665,000
4	GPM	\$175	PMO SME Lisa Roberts	3,800	\$665,000
4	GPM	\$175	PMO SME Hilary Foster Moles	3,800	\$665,000
4	GPM	\$175	Testing SME Patricia Arrechea	3,800	\$665,000
4	GPM	\$175	Testing SME Dezaree Moore	3,800	\$665,000
4	GPM	\$175	Federal Certification and Compliance SME Roshani Raghani	3,800	\$665,000
4	GPM	\$175	Requirements SME Reanna Jones	3,800	\$665,000
4	GPM	\$175	OCM SME Katie Weidner	3,800	\$665,000
5	SS	\$80	Project Coordinator Lead Payton Waybright	3,800	\$304,000
5	SS	\$80	Project Coordinator Morgan Krieger	3,800	\$304,000
5	SS	\$80	Project Coordinator Caitlin Poling	3,800	\$304,000
5	SS	\$80	Project Coordinator	3,800	\$304,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
			Samuel Kessler		
5	SS	\$80	Project Coordinator Stacie Mayhorn	3,800	\$304,000
5	SS	\$80	Project Management Support Staff Molly Hawkinson	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Bethany Pike	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Caitlin Cabral	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Carole Ann Guay	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Emily Hendrickson	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Janine DiLorenzo	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Jon Williams	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Jordan Ramsey	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Karla Fossett	142.5	\$11,400
5	SS	\$80	Project Management Support Staff Kyle Melton	142.5	\$11,400
			Total Hours:	156,045	\$25,218,350



EM = Engagement Manager
LPM = Lead Project Manager
GPM = General Project Manager
SS = Support Staff

4.0 Project Hours and Costs per Month

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

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	50	60	4,060	765	4,935	\$798,100
Month 2	60	80	5,410	1,020	6,570	\$1,061,750
Month 3	60	80	5,410	1,020	6,570	\$1,061,750
Month 4	60	80	5,410	1,020	6,570	\$1,061,750
Month 5	60	80	5,410	1,020	6,570	\$1,061,750
Month 6	60	80	5,410	1,020	6,570	\$1,061,750
Month 7	60	80	5,410	1,020	6,570	\$1,061,750
Month 8	60	80	5,410	1,020	6,570	\$1,061,750
Month 9	60	80	5,410	1,020	6,570	\$1,061,750
Month 10	60	80	5,410	1,020	6,570	\$1,061,750
Month 11	60	80	5,410	1,020	6,570	\$1,061,750
Month 12	60	80	5,410	1,020	6,570	\$1,061,750
Month 13	60	80	5,410	1,020	6,570	\$1,061,750
Month 14	60	80	5,410	1,020	6,570	\$1,061,750
Month 15	60	80	5,410	1,020	6,570	\$1,061,750
Month 16	60	80	5,410	1,020	6,570	\$1,061,750
Month 17	60	80	5,410	1,020	6,570	\$1,061,750
Month 18	60	80	5,410	1,020	6,570	\$1,061,750
Month 19	60	80	5,410	1,020	6,570	\$1,061,750
Month 20	60	80	5,410	1,020	6,570	\$1,061,750
Month 21	60	80	5,410	1,020	6,570	\$1,061,750

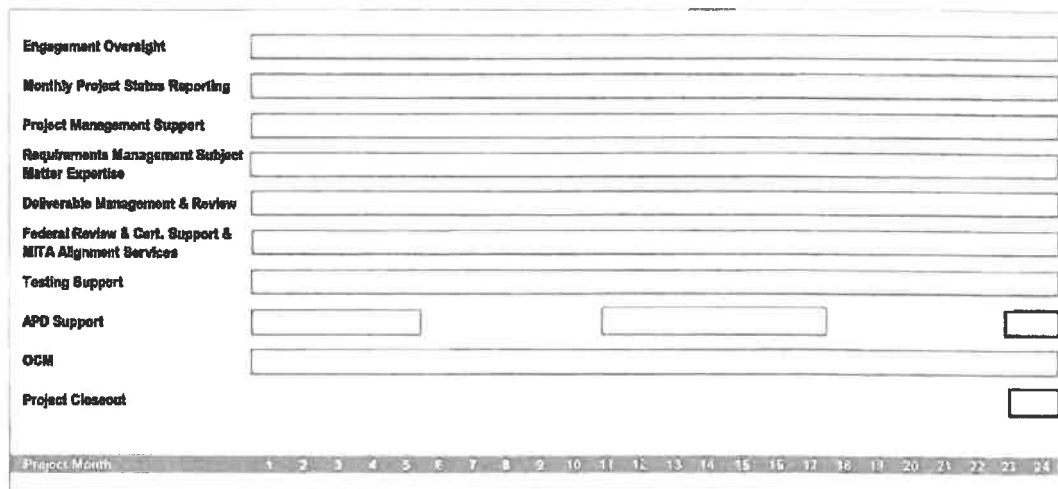


Month 22	60	80	5,410	1,020	6,570	\$1,061,750
Month 23	60	80	5,410	1,020	6,570	\$1,061,750
Month 24	60	80	5,410	1,020	6,570	\$1,061,750
Total	1,430	1,900	128,490	24,225	156,045	\$25,218,350

5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





BerryDunn Authorized Signature

As a principal of this firm in our 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. Burch

2022.04.14

16:32:04 -04'00'

Signature

Date

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

[Signature]

Signature

4/15/2022

Date



Appendix A: Federal Clauses

- **Americans with Disabilities Act**

This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

- **Drug-Free Workplace Statement**

The Federal government implemented 41 U.S. Code § 8103, Drug-free workplace requirements for Federal grant recipients in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides. Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:

1. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the work place.
2. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
3. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
4. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

Transactions subject to the suspension/debarment rules (covered transactions) include grants, subgrants, cooperative agreements, and prime contracts under such awards. Subcontracts are not included.

- **Royalty Free Rights to Use Software or Documentation Developed**

2 CFR 200.315 Intangible property.

- a) Title to intangible property (see §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the non-Federal entity. The non-Federal entity must use that property for the originally-authorized purpose, and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in §200.313 Equipment paragraph (e).
- b) The non-Federal entity may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.



- c) The non-Federal entity is subject to applicable regulations governing patents and inventions, including government wide regulations issued by the Department of Commerce at 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements."
- d) The Federal Government has the right to:
 - 1) Obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and
 - 2) Authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.



Appendix B: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal (employed BerryDunn since June 2010)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, Speech and Hearing Science, University of South Florida

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.

- o ***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.

- o ***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.

- o ***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.

- o ***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.

- o *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.

- o *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.

- o *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 MTA 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.

- o *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:	General Project Manager
Role at BerryDunn:	Principal (employed 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 (QA) oversight of large-scale technology initiatives. He has served in a project management and QA capacity for Medicaid projects in Maine, Iowa, and West Virginia. Prior to joining BerryDunn, Ed worked for Electronic Data Systems as a systems engineer and systems manager. Ed served as implementation project manager for pharmacy benefits management systems and project coordinator while employed by Goold Health Systems.

Relevant Experience

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

- **Ohio Department of Medicaid – Ohio Medicaid Enterprise System Independent Verification & Validation (IV&V) Services (12/2016 to present).**
The Ohio Department of Medicaid is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn is providing IV&V support. As project principal, Ed is overseeing the BerryDunn team.
- **West Virginia Bureau for Medical Services (BMS) (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid Data Warehouse / Decision Support System DW/DSS implementation; Substance Use Disorder 1115 Walver development and implementation; Affordable Care Act (ACA) analysis, and advisory services; ICD-10 compliance; Eligibility & Enrollment (E&E) systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; WVCHIP Implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives.



- ***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 ten 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 ten 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) – West Virginia Engagement Manager (06/2012 to present).**

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

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

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



team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

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

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

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

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

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

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

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



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

Presentations

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

**Brandon Milton, MBA, PMP®**

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal (employed BerryDunn since July 2011)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MBA, University of New Hampshire BS, Business Administration and Political Science, University of Maine Certified Project Management Professional

Overview

Brandon is a principal in our Government Consulting Group with more than more than ten (10) years' experience as a Project Manager and/or providing project management support services directly related to the analysis, development and/or implementation of programs, initiatives for a State Medicaid Agency. He specializes in Medicaid Enterprise Systems and is a certified Project Management Professional® with a successful track record of managing large information technology projects on time and on budget.

Relevant Experience

BerryDunn (07/2011 to present). Brandon specializes in working with Medicaid agency clients. Notable project work includes:

- **Hawai'i Department of Human Services Med-QUEST Division (MQD) – Organizational and Business Process Redesign (07/2017 to present).**
Brandon is currently serving in the role of project director / IT lead for a business process redesign effort for the customer-facing sections of Hawai'i's MQD. His work includes identifying opportunities for the State to leverage its new Medicaid eligibility determination system to improve efficiency and the customer experience. Phase two of the project just completed, which culminated in a findings and recommendations report that included recommendations for organizational transformation of eligibility offices and call centers.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 09/2017).**
Brandon served in the role of certification lead for the New Jersey MMIS replacement project. In this role, Brandon worked closely with the Implementation Team Office managers, the system vendor, and IV&V to plan for the certification of the replacement MMIS using the latest federal rules and regulations published by CMS. His work included leading a team of subject matter experts in the review of State policies and system requirements for alignment with certification criteria as well as system documentation that provides evidence of compliance for each of the certification checklist items.



- **West Virginia Bureau for Medical Services (BMS).**
 - ***Substance Use Disorder (SUD) Waiver Initiative Phase 1 Project (02/2016 to 07/2017).***
Brandon served in the role of project manager for the development of an 1115 Waiver to create a continuum of care for Medicaid beneficiaries with an SUD in West Virginia. He led a team of policy experts and actuarial analysts to develop the concept for the delivery system and determine the budget neutrality for the waiver services. His work also included the development of an implementation plan for the waiver. The waiver received CMS approval in fall of 2017.
 - ***Project Management of MMIS Procurement, DDI, and Certification (07/2011 to 10/2016).***
Brandon served as the lead project manager for the DDI and certification for the West Virginia MMIS. His work on the project included managing a core team of 17 individuals and approximately 30 full-time equivalents. The project team had responsibility for:
 - Facilitation of requirements validation sessions
 - Facilitation of business process redesign sessions
 - Facilitation of system design sessions
 - Quality assurance reviews of the vendor deliverables, including:
 - Project Management Plans
 - Detailed system design documents
 - Business process mapping documents
 - Security, privacy and confidentiality plans
 - System integration test cases;
 - Provider documentation
 - Operational readiness plans
 - Training Plans
 - CMS Certification evidence
 - Planning and execution of user acceptance testing
 - Planning and quality assurance reviews of CMS certification evidence;
 - Planning and execution of operational readiness testing
 - Oversight of service level agreements and system performance in operations

The West Virginia MMIS went live in January of 2016 and the State received their certification letter from CMS in October 2016.
 - ***Data Warehouse / Decision Support System (DW/DSS) Project Management (02/2012***



to 12/2014).

Brandon provided project management and quality assurance services for the BMS' DW/DSS implementation. As part of this effort, he facilitated business process redesign sessions with the Program Integrity staff to align their business processes with the new case management system. He also facilitated requirements validation sessions; worked with the State in identifying potential data suppliers; and worked with the selected suppliers to determine the data feeds they will provide the DW/DSS. He facilitated design sessions between the State, data suppliers, and vendor to determine the data elements that would make up each of the data feeds. In addition, he developed test cases for UAT to provide end users with assurance that the system processes information according to requirements.

- ***Provider Enrollment (PEA) Project.***

Brandon provided project management support for the DDI of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He created status reporting deliverables and assisted the project manager in executing the project according to the project management plan.

- ***Missouri Department of Social Services – Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services.***

Brandon provided project management oversight and subject matter expertise for the development of evidence packets for CMS gate reviews of MEDES. This work included identification and validation of system evidence to align with the checklist criteria from the new Medicaid Eligibility and Enrollment Toolkit (MEET) that CMS released in August of 2017.

Office of US Senator Susan M. Collins (2007 to 2010). As mail director for the Office of U.S. Senator Susan M. Collins, Brandon was responsible for designing, implementing, and managing process improvements to streamline paperless mail operation involving a staff of 75 across eight offices in Maine and Washington, D.C. He reduced response time to constituent inquiries from 30 days to as little as two days and downsized the mailroom staff from four to two employees. In addition, he supervised legislative correspondents and interns; screened and edited outgoing correspondence on behalf of Senator Collins; and created and managed an amendment tracking system for major legislation, including the FY2010 budget, the American Recovery and Reinvestment Act (ARRA) of 2009, and multiple appropriation bills.

Presentations

"West Virginia MMIS Certification Pilot," Presentation for MESC 2015, Co-presented with Edward Dolly (West Virginia Department of Health and Human Resources) and Chris Green (Molina Healthcare), 8/19/2015



Alex Lyubarov

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed BerryDunn since August 2021)
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Science in Computer Engineering, Dagestan State Technical University Master of Science in Computer Engineering, Dagestan State Technical University

Overview

Alex is a manager with more than 20 years of IT experience who has worked in various Healthcare, Government, Health and Human Services and Financial Management organizations. He has led various IT projects for project scope, requirements, budget, schedule, risk management plan, communication plan, RFP/procurement development and other project management related tasks and has developed the ability to support clients during the Systems Development Life Cycle using Agile and Waterfall methodologies. He is adept at working in a fast-paced business environment possessing excellent communication, analytical, presentation, and leadership skills.

Experience

BerryDunn (08/2021 to present).

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (07/2021 to present).**

Alex is currently serving as the program manager overseeing BerryDunn's PMO team supporting the implementation project for West Virginia's Integrated Eligibility System (IES) also called People's Access To Help (PATH) to support the eligibility, enrollment, and administration of the WV DHHR's human services programs, including Medicaid, CHIP, SNAP, TANF, Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA). He also manages the PMO team that provides project management, deliverable review, testing support, organizational change management (OCM) support, requirements support, certification and compliance support, and general subject matter expertise supporting the PATH DDI project.

Technology Professionals Group Inc. (November 2019 to August 2021). Alex worked as a senior project manager and senior business-technical consultant to support enablement and expansion of the



new and existing business initiatives. Assisted on supporting day to day program/project teams. He helped on RFP/RFQ proposal responses including all aspects of document development. He also assisted leadership by providing consulting expertise in State & Local Government and Healthcare industries. Alex supported all phases of New York State Medicaid Data Warehouse (MDW) during the implementation cycle, developed customer deliverables in accordance with contract requirements and company documentation standards, and researched and provided recommendations to the client on critical business decisions. He also developed secure vitality for client relations amongst the business development teams, as they relate to a client's prerogatives to help create better alignment of communication for pipeline opportunity objectives.

KPMG (May 2014 to May 2019). Alex worked as a manager and PMO lead to manage a team of SMEs Healthcare Patient Access and Revenue Cycle assessment and implement projects for process improvements, enhance the patient experience, and reduce financial risks. He assisted the State of Connecticut Department of Social Services on their Integrated Eligibility Systems (IES), and Medicaid projects with Project Management and data analysis. Alex liaised between the systems integrator and State stakeholders to ensure the Project Management Office functions and other related tasks were transparent and operational.

Albany Medical Center Hospital (September 2008 to May 2014). Alex worked as a senior systems analyst to implement vendor purchased solutions, analyze EHR/EMR deployment, and assess needs of internal business units. He performed systems application support and provided on-site technical support for multiple environments.

**Crystal Gray**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed BerryDunn since January 2018)
Years of Experience Relevant to Proposed Role:	>10 years
Certifications and Education:	BA, West Virginia State University MLC Certified Medicaid Professional (MCMP-II)

Overview

Crystal is a senior consultant in BerryDunn's Government Consulting Group who brings nearly two decades of diverse management experience to the group. In recent years, Crystal has focused on project and resource coordination in which she has been a crucial part of scheduling for clients and vendors. Crystal has also taken on the responsibility of orienting new hires within the GCG group.

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

- **West Virginia Department of Health and Human Resources (DHHR) – Medicaid Eligibility and Enrollment Implementation Assistance (01/2018 to present).**
As lead resource coordinator, Crystal conducts daily meetings for team organization and motivation, provides quality control for meeting materials to satisfy the contract Service-Level Agreement (SLA), schedules meetings according to project priorities to help ensure project stay on schedule, provides organization to team for vendor accountability, manages project Request for Information (RFI), and provides subject matter expertise in project meetings.
- **West Virginia Bureau for Medical Services (BMS) – COVID-19 Emergency Services Sub-Project (04/2020 to 07/2020).**
Crystal reviewed the COVID-19 response efforts of all 50 states and U.S. territories to help inform the development of West Virginia's COVID-19 response strategy. She performed project research, organized project information according to priority, created the website review for the COVID-19 Weekly Round-Up presentation, and presented website review from the COVID-19 Weekly Round-Up to BMS on a weekly basis.

AAA of West Virginia and Kentucky (2009 to 01/2018). As the district office supervisor, Crystal operated an office with over \$8M in revenue, maintaining and achieving a profitable budget year over year. She achieved sales goals in each department year over year, and maintained responsibility for resolving customer issues, maintaining staff levels, scheduling, training, internal auditing, and coaching staff.



Emily McCoy, RN, BSN, PMP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since July 2016)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BS, Nursing, Marshall University Registered Nurse Certified Project Management Professional

Overview

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

Relevant Experience

BerryDunn (07/2016 to present). Emily works in BerryDunn's Medicaid consulting practice, bringing her years of experience to state Medicaid agency clients, particularly in the area of certification.

- **West Virginia Department of Health and Human Resources (DHHR)**
 - **Eligibility and Enrollment Implementation Assistance (01/2018 to present).**
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily is able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
 - **Portfolio Coordination and Management (PCM) (11/2020 to 10/2021).**
Emily currently serves as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DHHR align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provides a valuable perspective and ability to help the State obtain its desired outcomes.
 - **Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020).**



Emily served as the project manager for the West Virginia DHHR EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DHHR that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018).**
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA – Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 to 04/2017).**
Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

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

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



- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

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

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

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

- **Transitional Care Unit (05/1999 to 12/2002).** During her time on the Transitional Care Unit, Emily held several different positions.
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally-mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.
- **Neuroscience Unit (01/1998 to 05/1999).** As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct



patient to care to individuals with neurological conditions. Specific duties included:

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



Alex Tannenbaum

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since September 2020)
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	BS, Business – Market & Finance, Clemson University Study Abroad Program, Business, Bond University, Robina QLD, Australia

Overview

Alex is a consultant in BerryDunn's Government Consulting Group (GCG). He brings five years of resource and client management experience to the group. Alex's positive energy, excellent organization and communication skills, and professionalism nicely complements his current work on the Eligibility and Enrollment Implementation Assistance project, where he focuses on project, resource, and reports coordination and management for the largest active project within GCG.

Relevant Experience

BerryDunn (09/2020 to present).

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (09/2020 to present)**

As the lead resource coordinator on the West Virginia DHHR Eligibility and Enrollment Implementation Assistance project, Alex manages the day-to-day coordination of a 40+ member team for a large-scale, system implementation project directly impacting four DHHR agencies in West Virginia. Alex has a variety of responsibilities, some of which include conducting daily meetings for team organization, providing oversight of the daily project coordination activities, developing process flows, prioritizing, and scheduling meetings to ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs), managing project Requests for Information (RFIs), and helping to ensure vendor accountability and adherence to SLAs. As the reporting lead, Alex drafts reports, oversees the project team's reporting activities, and provides quality assurance to help ensure assignments are complete and on time for client submission. Prior to moving into the lead resource coordinator role, Alex was responsible for project coordination, which included capturing meeting notes, tracking action items, reviewing project documentation, researching various project assignments, and business analysis.

TEKsystems (06/2016 to 09/2020). Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement



solution strategies. He solutioned in areas of Traditional Software Development (SDLC and Agile), Cloud Enablement, Data Analytics, DevOps & Automation, and Digital Experience. Industries supported included Healthcare (Medicaid, IES, EMR, and Insurance), Pharmaceutical/Life Science, and State/Local Government.

**Lorrie Davenport**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since August 2013)
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Master of Business Administration, Southwest Texas State University Bachelor's Degree in Business Administration, Concordia University Bachelor's Degree in Psychology, Texas A&M University Certified Professional in Utilization Review

Overview

Lorrie Davenport brings more than 25 years of healthcare experience including provider relations for Medicaid and Medicare programs, executive oversight, complex technology implementations, hospital administration, fraud and abuse, utilization review, and operations management.

Relevant Experience**BerryDunn (08/2013 to present).**

- **West Virginia BMS – MMIS DDI (08/2013 to present)**
Lorrie has been providing project management, subject matter expertise, and thought leadership on the MMIS DDI project. Lorrie draws upon her extensive experience with MMIS implementations to share lessons learned and best practices that aid in risk identification and strategies for mitigation, resulting in time and resource efficiency for this project. She has been a driver of many key project management strategies for the MMIS that have resulted in improved quality deliverables, increased oversight in requirement traceability, and additional dashboard reporting for the Bureau. She has been a key player in identifying and developing acceptance criteria for deliverables and milestones as well a key reviewer of Molina's deliverables. Her knowledgebase is flexible enough to allow her the ability to 'get into the weeds' in design documents and DDI discussions, provide input into CMS certification, and engage at executive levels regarding risk/issue/mitigation and project management oversight.

HP Enterprise Services (formerly EDS) (07/2002 to 06/2012). Lorrie worked on the following projects and internal initiatives while employed with HP Enterprise Services:

- **Plano Support Center (05/2010 to 06/2012):** As Solution Architect, Healthcare Consultant, and Business Process Optimization SME, Lorrie contributed to HP's enterprise architecture strategy, applications, and COTS design; led a team of 30 solutions professionals in tasks such as gap analysis, business process review, mapping of requirements for traceability and solution input, and oversaw technical architecture, design, hardware/software components, resources, and interoperability during the E2E solution integration. Her work with HP has given her experience with large scale databases such as member eligibility, provider, claims engines, and DW/DSS, and tools such as Microsoft SQL



and Oracle, as well as experience designing solutions for SOA, n-Tier architecture, and UNIX environments.

- **Connecticut InterChange Implementation (10/2005 to 05/2010):** As the Implementation and Operations Provider Services Manager, Lorrie led provider relations, publications, Internet portal, provider and client call centers, electronic data interfaces, quality assurance, and training of 6,000 providers and 250 state employees annually. She was responsible for directing operational readiness testing and preparation for CMS certification, and developed and implemented the State's first online secure web portal and enrollment wizard and the first member toll free call center. This position gave her experience in solution and project designs in accordance with CMMI, PMI, PMBOK®, Project Life Cycle (PLC), SDLC, Microsoft Project, and the International Organization for Standardization (ISO). She served as a SME in web portal design, call center technology, business process optimization services, back office support, print/imaging, workflow, and CRM, and consulted as a provider and member data and business process SME for new and add-on logos. Her expertise in HIPAA, ANSI ASC X12 EDI Transaction Set Standards is bolstered by experience with healthcare informatics solutions for the ACA, ACO, HL7, and EMR.
- **Account Operations for Medicare Part B (09/2001 to 10/2005):** As the Northern Operations Site Manager, Lorrie monitored EDS' adherence to CMS requirements and collaborated with external and internal customers, including CMS, the Office of Inspector General, the Office of the Attorney General, the U.S. DHHS, the Social Security Administration, providers, vendors, and beneficiaries. She directed activities of the tri-state (ME, VT, NH) provider call center and quad-state (ME, VT, NH, MA) beneficiary call center, implemented an enhanced voice-response system, developed and implemented a call center training program that blended provider and beneficiary skill sets to maximize resources while reducing training time from ten to five weeks, and implemented a training program for a customer service organization, in preparation for a successful ISO certification.
- **Account Operations – Fiscal Agent, Medicaid (11/1996 to 09/2011):** As the Provider Services Manager/Interim Provider Services Director for the Austin, Texas office, Lorrie designed and managed provider legislative projects and managed a budget of \$6.5 million for education and outreach to 75,000 providers of Medicaid and chronically ill and disabled children. She worked with associations and key provider communities to complete the legislative reenrollment mandate; provided status reports to the Medicaid Director, Medicaid Bureau Chief, and legislative offices; was a frequent guest speaker at the Texas Medical Association, Texas Hospital Association, and Mental Health and Mental Retardation meetings; designed specifications and testing plans for implementing NPI; piloted an electronic enrollment and reenrollment application on the Medicaid website; and directed the provider enrollment, provider file maintenance, policy, publications, and provider outreach teams.

Lorrie also served as QA for Managed Care for the Texas Medicaid STAR Program. In this position, she designed, implemented, and analyzed the results of a provider satisfaction survey for Quality Assurance Reform Initiative (QARI) standards; analyzed healthcare data; and served as an auditor on the state's readiness committee that determined HMO plans' status and capabilities before entering the HMO STAR Medicaid network.



Magellan Health Care (05/1986 to 11/1996). Lorrie served in several roles during her ten year tenure with Magellan, including Deputy Hospital Director, Director of Utilization Review/Case Management/Medical Records, and Cognitive Behavioral Therapist.

**Marnie Hudson**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since November 2017)
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	BS, Computer Information Systems, Strayer University Associate's Degree, Computer Science Information Systems, Delaware Community College MMIS Level II – Claims Certification Medicaid MMIS Level I Certification

Overview

Marnie is an experienced business and QA analyst with a developer background and more than 15 years of experience in assisting with the implementation of state Medicaid Management Information Systems (MMISs). Her background includes leadership roles on five MMIS implementations and one integrated eligibility system consisting of multiple state social services. In her roles, she managed on-site and offshore teams to successfully develop, implement, and test design of requirements. Her developer background helps to clarify design of requirements and how they should be implemented to support the client's business needs.

Relevant Experience

BerryDunn (11/2017 to present). Marnie works with state Medicaid agencies.

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (02/2018 to present).**
Marnie is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. She reviews and provides input into assigned project deliverables, assists with project activities associated with requirements, and leads the review and validation activities for the Document Inventory (forms, letters, notice) of all legacy systems.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (11/2017 to 01/2018).**
As a PMO and UAT SME, Marnie supported testing related activities as part of the West Virginia / New Jersey Leverage and Reuse Project and worked collaboratively with the New Jersey Replacement Medicaid Management Information System Implementation Team Office. She provided input into the preparation of UAT planning activities, provided support with project activities associated with MMIS system interfaces, and conducted testing related research as needed to support project activities/testing efforts.



- **S2Tech/Conduent (07/2016 to 05/2017).** As a senior business analyst, Marnie drove the implementation of the New York Medicaid Management Information System (NYMMIS). This included mapping eMedNY legacy data for Financial and Claims appropriately to the database fields in new system, conducting table level analysis on both NYMMIS tables and legacy MMIS tables, and leading the data conversion component for the financial subsystem for the new NYMMIS.
- **S2Tech/Xerox (02/2013 to 07/2016).** During Marnie's time with S2Tech/Xerox, she worked on several projects.
- **Mississippi Modernized Medicaid Eligibility Determination System (03/2015 to 07/2016).** Marnie tested interface components, trained and led team members to ensure the proper conduct of testing methodologies and procedures, ensured accurate creation and execution of ~300 complex test script scenarios, successfully led the testing team through execution of test scripts across 16 different interfaces/batch processes to support the eligibility determination requirements for approval or denial of Medicaid benefits, and documented and managed testing defects.
- **North Dakota Medicaid Management Information System (NDMMIS) (02/2013 to 03/2015).** Marnie acted as a SME for the implementation of the NDMMIS. She ensured all testing efforts were developed and conducted to satisfy the Service Authorization and Electronic Document Management System functional area requirements, ensured the successful execution of ~400 test script scenarios, conducted concept sessions to discuss system functionality, and managed testing defects.
- **Independence Blue Cross (IBC) (06/2012 to 01/2013).** As a senior business analyst, Marnie maintained compliance with CMS mandates and initiatives through various programs in Medicare, including Medicare Part D and the summary of benefits for products. She compiled requirements for improved operational process of monitoring Medicare client's maximum out-of-pocket threshold via the creation of an Access database, and conducted concept sessions with product owners to capture business needs for improvements to Access databases.
- **Hewlett Packard Enterprise Services (01/2004 to 06/2012).** Marnie served as chief liaison as well as directed all operational and technical communication activities between HPES (internal and external), the Delaware Medical Assistance Program management team, CMS, and the Delaware Prescription Drug Plans. She also served as a functional developer lead of the MMIS. This included leading the design and development of Medicare Part D System changes using SDLC methodologies, serving as a SME in the Provider & Third Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the Reference Subsystem.



Agnes Beeks-Smith, CSM, CSPO

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since October 2020)
Years of Experience Relevant to Proposed Role:	23 years
Certifications and Education:	BS, Physics, Spelman College

Overview

Agnes brings extensive knowledge of the Georgia, North Carolina, South Carolina and Alabama Medicaid policies and procedures. She has experience with agile methodology and sprint development; has worked with UAT acceptance criteria testing for sprint releases; and served as an advisor for CCB (Change Control Board). She is knowledgeable in HIPAA X12 transactions for the processing of electronic claims, as well as state and federal government Medicaid/healthcare requirements and the MITA seven conditions and standards.

Relevant Experience**TEK Systems (10/2020 to present)**

- **BerryDunn (10/2020 to present)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (10/2020 to present)**
As a functional lead for West Virginia Child Support division for PATH project implementation, Agnes assisted with the management of requirements analysis for inclusion in scope. She aided with conducting Design Validation sessions by leading the review of functionality denoted for design documentation for BCSE Child support. She provided tracking of approvals and change requests to ensure project timelines are met, reviewed and updated project status reporting for visual tracking purposes, and assisted with UAT scenarios from the design validation ticket review. Agnes also provided guidance to DHHR for activities and timeframes of deliverables.

Optimized Manpower Solutions (12/2014 to October 2020). As a senior business analyst for Alabama Medicaid, Agnes helps to ensure that MITA 3.0, MECT and Agile methodology guidelines are executed for Member Enrollment for MAGI and Non MAGI programs. She serves as a liaison for OBC (Outcome Based Certification) for transition from E&E standards checklist requirements. Her other duties include JAD sessions, gap analyses, interface review, development of BDDs, UAT, and user training.

Globalpundits (12/2013 to 10/2014). As a business analyst for a replacement MITA 3.0 MMIS implementation, Agnes helped to ensure that MITA 3.0, MECT and Agile methodology guidelines were executed for provider enrollment. She developed business rules for provider web portal, management



and mock screen development; performed a gap analysis of current system requirements; and was responsible for several tasks related to the provider enrollment business, system and security rules.

S2Tech (03/2013 to 10/2013). As an MMIS subject matter expert for Montana's MMIS implementation, Agnes helped to ensure that MITA guidelines were executed for provider, contact management and AVRS. She reviewed the State's RFP for comprehension of test case development and gap analysis; developed test case scenarios for provider enrollment/ maintenance, contact management, web portal and AVRS; and performed various testing activities.

Hewlett-Packard Enterprise Services (02/2009 to 02/2013). Agnes served as the contact center supervisor, responsible for overall implementation of GAXIX account call center and management of over 100 employees and contractors. This included the development of provider, member, CTMS (contact tracking management system) and auxiliary navigational and procedure manuals; coordination of training for new supervisors and implementation staff, and develop of training materials; and backup for the Provider/Member Services Manager and Field Services Representative Supervisor.

EDS (Electronic Data Systems) (09/1999 to 02/2009)

- **Provider Services Supervisor (04/2003 to 02/2009).** Agnes was responsible for the maintenance of the existing MMIS system and the development of an NPI claim team. She supervised and monitored contractual requirement performance of up to 36 customer relations representatives; performed prior approval entry for dental and optical provider; worked on file maintenance for policy updates to audits and edits for NCXIX (North Carolina Medicaid); and developed of walkthrough documentation and presentation of DABD for client approval.
- **Call Center Supervisor (09/1999 to 04/2003).** Agnes supervised 40 call center agents, including newborn and nursing home inquiries. She developed provider inquiry agents to meet all service level requirements, coordinated training curriculum for new supervisors and implementation staff, and assisted with development of training materials.



Crystal Fox

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since October 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.

**Richard Moore**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since October 2018)
Years of Experience Relevant to Proposed Role:	31 years
Certifications and Education:	BS, Biophysics, The Ohio State University Microsoft Certified Systems Administrator (MCSA) training Microsoft BizTalk Server training Microsoft Windows Solution training – Windows NT & BackOffice AMA Managerial & Team Building Skills for Project Managers HIAA Health Insurance Associate, Insurance Education Program Dale Carnegie Sales Training

Overview

Richard is a consultant with over 30 years of experience with healthcare information systems. His expertise includes healthcare industry, project management, business analysis, business administration/operations, electronic data interchange (EDI), electronic medical record (EMR), physician practice management (PM), health information exchange (HIE), testing, training, support, and consulting. He has worked directly with providers, payers, software manufacturers, electronic data interchange organizations, billing services, clearinghouses, state Medicaid programs, the Centers for Medicare and Medicaid (CMS), and other government agencies. Other experience includes HIPAA implementation and compliance consulting, end-to-end testing assistance, MITA SS-A 3.0 analysis, and healthcare policy and advocacy for HIT.

Relevant Experience**DME Consulting (1998 to present)**

- **BerryDunn (10/2018 to present)**
 - **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (10/2018 to present).**
Rick is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. He reviews and provides input into assigned project deliverables, assists with project activities associated with requirements, and leads the review and validation activities for the Document Inventory (forms, letters, notice) of all legacy systems.
- **Ohio Department of Medicaid (ODM) (03/2017 to present).** Richard is currently serving as the project manager for the Ohio Medicaid IT System (MITS) MMIS, managing as many as nine



projects simultaneously. His work includes interface projects from MITS to ODM's ancillary systems, including Ohio Benefits, Ohio Department of Jobs and Family Services, and external partners such as managed care plans, automated health systems, Change Health, and CMS.

- **Philips Lifeline Government Services Department (GSD) (07/2016 to 08/2016).** As a business analyst for EDI process improvement, Richard's analysis involved observation of real-time operational processes, gathering GSD technical history and current Philips corporate technology, defining GSD pain points in the claims, eligibility and clearinghouse processes, and analyzing EDI processes for translation, validation, communications and electronic funds transfer. He created GSD requirements and specifications for vendor responses, engaged vendors to solicit bids and guide through discovery, and made recommendations for EDI process improvement to GSD management.
- **Indiana Division of Family Resources (DRF) (12/2015 to 05/2016).** As a technical analyst for the Indiana Eligibility Determination Services System (IEDSS) project, Richard analyzed the preparedness of DRF and the Indiana Office of Technology (IOT) in meeting the requirements of the federal government to obtain an Authority to Connect for the IEDSS. Areas of review and recommendation CMS system security plan (SSP), Minimum Acceptable Risk Standards for Exchanges (MARS-E) versions 1.0 & 2.0, Plan of Action and Milestones (POA&M) report for SSP from MARS-E v 1.0, the memorandum of understanding between DRF and IOT, and the Deloitte IEDSS deliverable documentation especially the Technical Architecture, Updated Operations Documentation/Processes, Operational Readiness Plan, Business Impact Analysis, Contingency Planning/Continuation of Operations, and Schedule of Work for Stage 2. Other areas of review included the IRS Security Guidelines Publication 1075; Safeguards for Social Security Administration (SSA) provided electronic information; Security Guidelines for Food and Nutrition Services (FNS) electronic information.
- **Centers for Medicare and Medicaid Studies (CMS) Center for Consumer Information and Insurance Oversight (CCIIO) (02/2015 to 07/2015).** Richard served as an EDI analyst for the enrollment resolution and reconciliation (ER&R) project to troubleshoot issues with tax form 1095-A – the health insurance marketplace statement generated for the 2014 tax reporting period related to enrollment in the federally facilitated marketplace. He documented the issues and provided resolutions, and was assigned to the VIP and Correlated Cases teams working on the most difficult and high visibility issues.
- **Blue Shield of California (01/2013 to 04/2013).** As an architect with DevCool, Richard worked with Blue Shield of California to develop the EDI implementation requirements necessary for their participation as a Qualified Health Plan (QHP) in Covered California, California's health insurance exchange. He provided business analysis and recommendations for Enrollment management involving Edifecs XEngine, IBM Websphere Enterprise Service Bus, SQL Databases, Trizetto Facets Middleware, Trizetto HIPAA Gateway, ETL, enhancements for reconciliation, and reporting.
- **EMR Projects for GPO (2008 to 2013).** Richard provided project management, business



analysis, and consulting to implement electronic healthcare record technology for physicians using COTS EMR systems, electronic health records, health information exchange, pharmacy, laboratory, billing, and mobile office resources.

- **SummaCare, Inc. (2003 to 2009).** As the project manager for the Payor Implementation of HIPAA transactions for 10/2003 mandate, Richard was responsible for HIPAA X12 4010A1 transactions implementation, operational conversion, and management consulting. His work included the creation of HIPAA implementation companion guides, work with the Director of Business Systems Development to perform needs analysis, and the coordination of transaction implementations with delivery of AMISYS Healthcare Insurance System Upgrade project plan.
- **CNSI (2006 to 2008).** Richard served as a business application consultant for HIPAA Transactions 820 and 834 for Washington State and Michigan State web-based MMIS development projects and general HIPAA transaction consulting. He created detail design documents from original high level design documents prepared for RFP and compliance with HIPAA requirements, held customer requirement sessions to define detail requirements, and applied the specific rules for HIPAA X12, Medicaid managed care requirements and industry best practices for transaction handling.
- **Ohio Health Information Network, HTP, Inc. (2005 to 2006).** Richard served as the Central Ohio project manager and lead consultant to develop a prototype for a Nationwide Health Information Network (NHIN) Architecture and NHIN Proposal development for the Utah Health Information Network (UHIN).
- **CMHC Systems, Inc. (Netsmart) Behavioral Healthcare Software (2004 to 2005).** Richard provided project management, business assessment services, and implementation services for behavioral health client in California. He consulting on HIPAA ASC X12 transactions 837, 835 and Ohio MACSIS EDI transactions, testing system output/validation with State of Ohio and reporting.
- **Ohio Corporation for Health Information (1998 to 1999).** Richard provided project management for the Community Health Information Network (CHIN) Public/Private Pilot project. This included serving as the technical lead for the development of software, infrastructure, system testing, for HL7 clinical data and X12 EDI claims submission from Ohio employers and providers to Ohio Managed Care Organizations and the Ohio State Bureau of Workers' Compensation.
- **eHealth Ohio, Inc. (2003 to present).** Richard currently serves as the president of eHealth Ohio, providing strategic leadership, project management, healthcare technology advocacy, and outreach on best practices to the healthcare stakeholders of Ohio. He also serves as the administrator of eHealth Ohio's HIPAA Transaction Testing Portal using Edifecs RAMP technology 2003 to 2008.
- **CSG Government Solutions (02/2014 to 08/2014).** Richard served as a senior consultant on the MITA SS-A team for the Ohio Department of Medicaid, producing 25 MITA deliverable documents for ODM's APD to achieve 90% federal matching funds. He participated in both the



Business Process Modeling analysis and the Information Architecture and Technical Architecture analysis sessions, and worked with ODM SMEs to document the ODM As-Is and To-Be maturity levels. Richard also performed the review of 302 current and proposed interfaces of the ODM systems for data exchange and reporting.

- **Ohio Department of Mental Health (ODMH) (2000 to 2006).** Richard provided project management for the ODMH Multi-Agency Community Services Information System (MACSIS) project, which included 81 agencies and boards in 42 counties. The project involved implementing XAKTclaim COTS Behavioral Health Information Management Systems, providing training, conversion, testing compliance/data validation, electronic data exchange, reporting and project management Training Providers and Payers on Electronic Transaction and Code Set requirements and implementation of ASC X12 HIPAA Transactions. Richard also consulted on HIPAA privacy and security, provided testing support for behavioral health providers claims submissions to Ohio Medicaid MACSIS EDI system for payment, and consulted on ODMH/ODADAS data warehouse reporting and MACSIS data warehouse reporting.
- **Anthem Blue Cross/Blue Shield, Anthem Inc., Managed Care Systems & Digital Insurance Systems Corporation, Inc. (1991 to 1998).** Richard supported a scale project involving complex software to accommodate the processing of multiple lines of Anthem business to meet the demands of enrollment, billing, benefit plan creation, claims, agent/broker commissioning, financial reporting and business reporting. He worked in accordance with the software development life cycle, business analysis, needs assessment, design, development, testing (unit, system, and integration), implementation, conversion, training, and release control. In addition, he provided project management for implementation and system process improvement at Blue Cross Blue Shield of Connecticut Managed Care System.

**Shaun Meeks**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since April 2019)
Years of Experience Relevant to Proposed Role:	27 years
Certifications and Education:	MS, Economics, Econometrics, and Experimental Statistics, New Mexico State University BBA, Marketing and Economics, New Mexico State University

Overview

Shaun has 27 years of experience supporting the initiation, procurement, design, development, implementation, testing, operations, and management of technical business solutions to solve real-world problems in multi-disciplinary settings. He has significant experience in supporting the procurement, design, development, implementation, certification, testing, and management of Medicaid enterprise systems and program/policy changes by providing core planning, statistical modelling, demography and risk-based financial analytics services. Prior to health care, Shaun spent time assisting in the development of prototype agri-business research, technology, and economic sector development by supporting project management, application development, operations management, and planning through statistically based policy feasibility analysis, risk analysis, and market analysis services for multiple unique multi-disciplinary, and multi-organization projects.

Relevant Experience

The Auspex (08/2009 to present). Shaun is owner and principal consultant for The Auspex, an independent consultancy that provides IT modernization planning, feasibility studies, and cost/budgeting analytics for government health and human services initiatives. Selected projects include:

- **BerryDunn (04/2019 to present)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (04/2019 to present).**
Shaun provides financial subject matter expertise for the project including cost allocation plan development and overall financial SME services for system design and testing. Additionally, he offers business analysis services including design validation and testing, requirements traceability and fulfillment analytics and reporting, certification preparation and analysis, design document review and analysis.
 - In his other work for TEK Systems, Shaun is responsible for
 - Updating West Virginia's methodology for outpatient mental health rate setting that includes utilization and budget simulation with optimization towards targeted budget.
 - Conducting targeted micro-impact analyses, demography, and quantitative analytics to support West Virginia with policy changes including the ACA.



- Assisting New Mexico's Medical Assistance Division with planning for their MMIS re-procurement project.
- Assisting Nebraska with advanced planning budgets, cost/benefit and feasibility analytics, claims operations and staffing modeling, and mentorship for new Medicaid finance staff
- Applying econometric business and financial analytics for Florida's MMIS modernization project.
- Providing business and financial analytics and strategy for Minnesota's MITA and MMIS modernization project.
- Providing business and financial analysis for Missouri's MITA and MMIS procurement alternatives analysis and strategy project.
- Estimating the cost to design, develop, implement, administer, maintain, and operate a State-run exchange in Iowa, including a sustainability analysis.
- Providing cost/benefit analysis for New Mexico's eligibility procurement planning project.
- Providing statistical quality assurance reviews of the analytical components of Medicaid primary care programs and maternity care programs for the State of Alabama.

The Policy Collective, LLC (07/2012 to 10/2017). Shaun defined the financial, accounting, and comptroller processes, implementing the infrastructure and systems needed to track the financial position of the company. This included strategic planning, contract scope of work negotiations and evaluations, and product development initiatives.

FourThought Group (08/2002 to 08/2009). Shaun introduced robust and sophisticated quantitative analytics to the company's consulting toolset, which led to promotion to the company Economist. General duties included maintaining an up-to-date understanding of Medicaid expenditures, collecting and analyzing data for projects company-wide, from state-level Medicaid Budget and Expenditures System reports (CMS-64) and Medicaid statistical reports. He provided consulting services for Medicaid agencies in Alabama, Massachusetts, South Dakota, Texas, Vermont, and Washington.

New Mexico Health Policy Commission (01/2001 to 08/2002). As senior economist, Shaun researched, developed, and applied statistical and analytical techniques to existing databases; maintained information on national and state issues concerning health care finance and health economics; served as statistical, financial, and economics consultant to agency staff and related taskforces and workgroups; extended HEDIS methodology to allow statistical comparisons across New Mexico health plans; and developed micro-simulation methods that incorporated statutorily collected health data and other public data sources to accurately model and analyze the New Mexico Health care delivery system.

Other Related Experience. Shaun served as Chief Financial Officer for Sierra Vista Hospital (New Mexico). In addition, he served as programmer analyst, basic programming teaching assistant, and research assistant for New Mexico State University, all of which contributed to his expertise in economics and statistics.





Michelle Shores

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since September 2021)
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Arts in Business Administration/Public Relations/Marketing, University of Georgia Microsoft Certified Systems Engineer Paradox PAL Certified

Overview

Michelle has more than 20 years' experience in the healthcare marketplace with a history of working on IV&V with Risk Assessments, RFP/APD Development, HIPAA/HITECH Audit & Implementations, Innovating Big Data Capabilities Delivery, Industry Partnership Development and Training Outreach. She has led efforts to provide tailored solutions that aid industry leaders and offered guidance in mitigating risk while enabling profitability for covered and non-covered entities in the Ecosystem

Relevant Experience

BerryDunn (09/2021 to present)

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (09/2021 to present).**
Michelle is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. She reviews and provides input into assigned project deliverables, assists with project activities associated with requirements, and leads the review and validation activities for the Document Inventory (forms, letters, notice) of all legacy systems.

Puerto Rico Medicaid Program (2020 to 2021). Michelle worked as an eligibility and enrollment subject matter expert to provide expertise for the Citizen Portal, Caseworker Portal, Appeals, Audit, Quality Control and Certification requirements. She developed requirements functional and non-functional, facilitated Joint Application Design (JAD) sessions, and reported and monitored design completion, development, and implementation through end-to-end testing. Michelle also provided compliance and State Plan Amendment expertise, as well as internal IV&V subject matter expertise and recommendations for requirements validation.

Alabama Medicaid Agency (2018 to 2020). Michelle worked as an IV&V project manager responsible for both the MMIS replacement project from the initiation and planning phase and the current Eligibility & Enrollment product in production. She provided oversight with industry best practices as well as CMS



requirements and managed the IV&V team of multiple resources on site and virtual. Michelle developed deliverables, maintained and submitted progress reports, and produced internal team reviews. She also produced project work plan including stakeholder engagement, communication plan, SES process to IV&V and agreed outcomes with Project Schedule for three consecutive years.

Commonwealth of Kentucky Cabinet for Health and Family Services Division of Medicaid Systems (2017 to 2018). Michelle worked as the deputy program manager for the Medicaid Enterprise Management System replacement MMIS project under ACA expansion. She implemented new reporting structure with templates for program as well as new scheduling to meet programs deficits. During this phase, she discovered over 250 new tasks for program schedule and governance. She delivered all artifacts and checklists and researched and presented Administrative Services Organizations (ASOs) for Third Party Liability (TPL) and Pharmacy Benefit Management (PBM) type Fee for Service (FFS) implementations to Executive Management. Michelle also liaised between the Commonwealth, the Center for Medicaid/Medicare Services and internal Commonwealth and public facing teams.

Data Health Partners (2015 to 2017). Michelle worked as the principal for advisory validation and audit, which entailed performing IV&V with risk assessments, HIPAA/HITECH audit & implementations, innovating big data capabilities delivery, industry partnership development and training outreach. She was tasked to assist CMS with communicating HIPAA/HITECH/MMA/ICD-10, PPACA (Meaningful Use, HIE, Quality Measures) and engaged State/Federal Government and commercial organizations.

United Healthcare/Optum (2015). Michelle worked as a business analyst and healthcare SME to produce study outlining strategic capabilities and use case documentation of data sources for new implementation of the individual ID for Master Data Management. This ID enabled the plan to better provide consumers with their information as it pertains to demographic and medical care at all stages of life.

BCBS of Louisiana (2014). Michelle worked as a project manager that reported to leadership of all Program Management Office Governance policies and processes for Healthcare Reform Quality Rating System including Enrollment Survey, HEDIS Clinical Measures URAC measures and identification of Market Place Survey readiness and Benefits Open Enrollment. She collaborated in clinical partnerships implementation of vendor product America Well Telemedicine audio/video clinical visit enterprise platform for physician network outreach development under the direction of the Chief Medical and Assistant Chief Medical Officers.

Florida MMIS (2011 to 2014). Michelle worked as a project manager to create the Florida Medicaid Management Information System Independent Verification and Validation Waiver Analysis Report for the Governor and ASO. Her project management duties included managing and reporting to leadership of all operational readiness, communications, training, and providing seven vendors and IT with nearly 200 business resources.





Sudha Ganapathy, PMP®, Prosci®, ITIL (F). LSSBG, MCMP-II

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since July 2015)
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	BA, Computer Science, Rutgers University SDNBV College, TamilNadu, India – Major: Chemistry, Minor: Mathematics and Physics Information Technology Infrastructure Library (ITIL) Foundation Certification Certified Lean Six Sigma Green Belt Prosci® Certified Change Practitioner Certified Project Management Professional®, Project Management Institute® Medicaid Learning Center – MCMP-II certification

Overview

Sudha is a project manager with more than 25 years of extensive experience in the IT areas of development, system analysis, and quality assurance. She has led project teams to help clients achieve their quality assurance objectives on multi-stakeholder and multi-agency projects. She brings a proven track record in successfully implementing and maintaining software programs using PL/I, Cobol, DB2, IMS, various IBM utility programs, Easytrieve, and SQL, creating test cases for unit and integration testing and production support. Sudha prides herself on her ability to collaboratively work with clients (internal and external) to help them better utilize analytical tools and techniques to support project objectives, enhance and/or create new processes to help with testing, and realize opportunities for improvement in their existing processes.

Relevant Experience

BerryDunn (07/2015 to present). Sudha specializes in working with BerryDunn's Medicaid clients. Project highlights include:

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *People's Access to Help (PATH) DDI Project Management*
Sudha is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. As a PMO and System Integration Test (SIT) lead, Sudha creates, reviews and provides input into project testing deliverables, coordinates project activities, and assigns and oversees team assignments for 8-10 consultants. In addition,



Sudha is helping this project achieve its objectives by collaborating with the vendor, Optum, and DHHR to assist with UAT test scenario development and testing related activities.

Sudha is currently the lead for the Child Support release in addition to supporting the multiple User Interface maintenance release(s). As a lead, she collaborates with Optum on the requirements coverage, release schedule and deliverable activities related to testing. Sudha assigns and oversees team activities such as test scenario/test case/test results reviews, communicates with Optum on the findings, and approves the responses from Optum.

- ***RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016).***
Sudha assisted with the RAPIDS transition facilitation project and identified and documented risks/issues prior to the transition of RAPIDS from Deloitte to Optum. She also assisted with tracking Project Change Requests (PCRs) and creating reports to capture the aging of the defects, reviewed and provided feedback on process documents such as the Incident Management Report and Problem Management Report.
- ***Massachusetts HIX/IES Entities – IV&V Services (07/2016 to 09/2019).***
Sudha served as the BerryDunn IV&V testing lead for nine end-to-end project release cycles. In this role, Sudha interfaced with the State and vendor (Optum) counterparts to provide deliverable quality oversight, process improvement guidance, and enforced program and project best practices in Project Communication, Integration, Quality Management and Risk Management per the Project Management Body of Knowledge (PMBOK®).

For ongoing releases, she assessed the test coverage and execution against plan and the PMBOK® best practice, as well as monitored defect management practices against plan and the best practice generally accepted by similar industries, and monitored planned versus delivered requirements by release. In case of discrepancies, the findings were reported via the monthly IV&V assessment report and logged as issues and risks in JIRA® if the discrepancies warranted further and immediate remediation efforts.

For an alternate project for the same client, Sudha also played a key role in developing a new JIRA® Implementation and Requirements Management Plan. She worked with the MassIT analysts to analyze existing ALM/JIRA® data elements and define them in the new JIRA® instance.
- ***West Virginia Bureau for Medical Services (BMS) – Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 08/2016).***
Sudha assisted with UAT for BMS' MMIS re-procurement in the MITA business area of Provider Management. She reviewed and assisted with modifying the Doc Matrix, which was the primary document that drove the Provider Enrollment web portal options based on provider types.



XEROX – Government Health Solutions/Cognizant Technology Solutions (2012 to 2015). As a functional lead for Montana MMIS, Sudha collaborated with the Montana DHS business analysts to define and enhance the online Provider Enrollment portal. As a team lead for the Architecture and Letter related functional areas, Sudha defined QA Strategy, estimates, and roadmaps with on-site and offshore working models. Additionally, she created and executed test cases, analyzed and reviewed written test cases, and created and conducted various knowledge transfer sessions as needed. She conducted triage meetings as necessary with the functional team, development team, and Quality Assurance team to identify and rectify defects and complete testing activities as per schedule.

Affiliated Computer Services, Inc. (ACS) (2007 to 2012). Sudha worked as a systems consultant senior analyst and provider team sub-system lead, which involved analyzing business use cases, user interface specifications, and user requirement specification documents to create effective test scenarios and test cases. Additionally, she conducted online training to team members and provided statistics and reports to management as required; and created and executed quality test plans, test cases, and test scripts to comprehensively validate the functionality components of the Provider/Security Subsystems using Rational tools.

UNISYS (2000 to 2006). Sudha supported the Louisiana MMIS, converting several Easytrieve programs to COBOL and successfully promoting them to production. She was a member of the Medicaid Eligibility Determination System (MEDS) enhancement team, responsible for the modification and testing of several Management and Administrative Reporting Subsystem (MARS) programs to accommodate new recipient processing files. She conducted testing and provided Quality Assurance support to the testing team within critical staffing and time constraints. She partnered with team members in formulating their test cases to ensure testing was conducted and completed on time.

**Preethi Kembhavi**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since January 2017)
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Master's, Health Care Administration, University of Texas, Arlington BS, Biotechnology, Sreenidhi Institute of Science and Technology, Hyderabad, India

Overview

Preethi Kembhavi is a dynamic health care IT project/program manager and quality assurance leader with extensive experience in leading and managing million dollar projects. She is a pioneer of new and robust initiatives in Quality Assurance and SDLC space with proven track record of success.

Recent Experience

BerryDunn (01/2017 to present). Preethi serves as a subject matter expert in software testing, working with BerryDunn in New Jersey, as well as serving on the technical team for the West Virginia PATH project.

Massachusetts Office of Information Technology (Mass ITD) (03/2015 to 01/2017). Preethi serves as the key QA liaison for the Commonwealth's Medicaid agency, Mass Health, Connector Care Authority (CCA) as Business Stakeholders and United Health Group as the System Integrator, hCentive as COTS & Custom Development partner and various other Integration Partners that include, but not limited to Dell, Maximus, Optum ID, Federal Data Services Hub, MMIS, IV&V & CMS. She is the manager of software quality assurance on the Health Information Exchange (HIX) project, responsible for managing QA for multiple concurrent releases in an agile methodology. Accomplishments include:

- Managed the Vendors on board, Project Schedule & Scope, Change Requests, Risks and human resources. Update the Project Plan and the Project Management Plans as and when required and obtain approvals on deviations from the plan from the Stakeholders through the ICC process.
- Yielded cost savings in millions to the state by effectively reviewing RFQs/RFIs for contracts/services, LOE, invoices by the vendors, Final Acceptance Criteria, Task Order Closures and controlling procurement and onboarding activities for the project.
- Managed all the test teams on board and created a solid testing framework for the functional and non-functional releases, for all phases and types of testing within the project required for the seamless functioning of the State Based Marketplace that interfaces with 15 statewide health plans.



- Re-designed, improved, customized and automated: the deliverable process and migration from the existing Mass Forge system to Share-point and also the HP ALM tool to suit the project needs.
- Established exceptional testing foundation and remediation plan from scratch to ensure that the application is Accessibility compliant per the State (WCAG2.0) and Federal Guidelines (Section 508c). Directed and managed the Accessibility vendor on board.

Harvard Pilgrim Health Care (04/2014 to 02/2015). As the program lead, Preethi successfully managed 5 complex million dollar projects within the program timeline and budget to ensure seamless migration and decommissioning of the existing Legacy system (Amisys) to a brand new McKesson solution for the organization's Provider Network Data Management Initiative. She developed a solid framework for gathering meaningful requirements and user stories, and re-strategized the UAT for the business users, facilitated the scheduling of product demos, webinars and training workshops on the usage of the McKesson solution and post implementation support.

Blue Cross Blue Shield of Michigan (01/2012 to 03/2014). Preethi served as the manager of software quality. She developed and implemented a highly successful and complex calculation framework that led to the successful implementation of the "Taxes and Fees Estimator" Online Tool that enabled the residents of MI to estimate the Federal and State taxes on the health plans as required by the ACA and National Health Care Reform (NHCR). In addition, she initiated and led the transition from a "Users Doing Testing" (UDT) model to User Acceptance Testing (UAT) model that proved extremely successful and resulted in greater user satisfaction.

North Carolina Department of Health and Human Services (01/2011 to 12/2011). As the lead for project and business analysis, Preethi was responsible for gathering and documenting requirements, use cases, creation of User Stories. She performed fit-gap and as-is/to-be analysis that contributed to the future state of the system by utilizing business process models (context and data flow), Entity Relationship diagrams (ER-Diagrams) as precursors to workflow development, re-engineering and functionality enhancements. Preethi also provided strategic QA and testing expertise in End to End, Performance, Security, Blueprint, Wave and all the other types of testing and phases of testing within the SDLC.

Wisconsin Department of Health and Family Services (04/2009 to 12/2010). As Quality Assurance lead, Preethi coordinated with the software testing team, directing the use of test environments and creation of test data. She oversaw all the testing standards and test activities of the team to ensure that their new EDS developed and, feature rich MMIS system called the "Interchange" works effectively per the approved business and state requirements.

**Reginald Timmons**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since September 2021)
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Arts in Social Science, Westfield State University

Overview

Reginald has been a Senior Business Analyst with experience in integrated eligibility systems. He has 9 years of experience in federally funded government programs, such as Medicare, Medicaid, TANF, and SNAP delivery and analysis. His experience with project management stretches across the project lifecycle from requirements gathering through design sessions and into testing, implementation, and maintenance. He has developed strong research skills and is able to work independently as well as within cross-functional teams and tight deadlines.

Experience

BerryDunn (09/2021 to present). Reginald serves on the testing team for the West Virginia PATH project.

State of Connecticut (March 2011 to August 2021). Reginald worked as an IT Social Services Analyst to develop, write, and execute scenarios for testing. He provided customer support to users and diagnosed and resolved processing issues. He also worked on business process mapping, business requirement gathering, implementation of system upgrades and modifications, and loaded data into test environment. Reginald developed reports using Enterprise Resource Planning Systems, identified and addressed training needs, and participated in project Business System Design. He led test team activities, such as developing test plans, validating test results, tracking defects & implementing correction plans, while coordinating across multiple teams. Reginald also validated requirements traceability matrices as they were developed, maintained, and completed. He utilized Agile Methodologies and Daily Scrum to deliver shared objectives and worked with the Medicaid program at a federal and state level.

Department of Social Services (September 2009 to March 2011). Reginald worked as an eligibility services worker responsible for conducting interviews to determine client eligibility for medical, TANF, and SNAP programs. He maintained case documentation, referred cases to the respective unit in charge of client benefit compliance, and prepared fair hearing summaries in accordance with agency policy and procedures. Reginald was also responsible for determining medical exemptions for employment services, requirement and extension benefits by completing referrals to agency medical



review team. He maintained contact with the client and collateral agencies during the application period to establish eligibility.

The Connection Inc. (2007 to September 2009). Reginald worked as a case manager to assist clients with successful re-entry into the community. He was responsible for facilitating cognitive behavioral and employment groups for assigned caseload, maintaining weekly contact with collateral agencies, and providing supervision and case management to parolees in the program. He also implemented, monitored, and documented daily progress toward successful reentry while conducting client drug testing. He worked closely with community-based organizations and businesses to assist with client career development, conducted compliance checks, and developed strength based care plans that targeted concerns with education, employment, sobriety and housing for parolees.

Community Mental Health Affiliates (2006 to 2007). Reginald worked as a residential counselor to lead peer recreational groups and coordinate transportation for weekly therapeutic appointments. He performed case management through maintaining day-to-day records of clients' initial assessment, prepared service plans, periodically reviewing client's progress toward service goals, and prepared discharge summaries. Additionally, he provided counseling and advocacy for adults with mental illness, supervised daily medication, performed routine apartment safety checks.

Middlesex Hospital (2002 to 2003). Reginald worked as an Emergency Mobile Adolescent Crisis Worker to provide therapeutic intervention services: including providing crisis assessment to children and adolescents with psychological concern and/or suicidal/homicidal/psychotic behavior. He utilized resources in clients' network including referral agencies, police, community resources, schools, families and work sites, and worked closely with DCF Juvenile Justice System to stabilize clients and prevent hospitalization. He coordinated and participated in Hospital inpatient intakes and then provided recommendations/referrals to psychiatric ward and assisted with discharge plan. He conducted field visits, in-home evaluations, court observations, background investigations, and emergency department assessments. Reginald provided solution focused therapy to families in crisis as well as short term counseling to assist with crisis stabilization.

The Children's Study Home (1994 to 2006). Reginald worked as a residential counselor to provide counseling, advocacy and anger management training to adolescent clients. He coordinated and led recreational activities geared toward building self-esteem and tutored children and youth.

**Adam Bowman, CEH, CCNA**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since October 2019)
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	BS, Computer Science, Minor in Mathematics, West Virginia State University CompTIA Security+ Certified Certified Ethical Hacker (CEH) Cisco Certified Network Associate (CCNA) Trained

Overview

Adam is an experienced security professional, who brings a background in IT supported by 7 years in the United States Air Force. His work experience includes producing meeting minutes, decision making, and public speaking. He is a United States Air Force Cyber Operations Officer, and has completed undergraduate cyber training at Keesler Air Force Base as well as Cyberspace 200 at Wright Patterson Air Force Base.

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

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (10/2019 to present)**
Adam supports the WV DHHR's PATH Project by leading and coordinating PMO related business planning efforts. He collaborates with various teams and holds meetings to develop project plans to present to upper-level management. He also closely monitors each work stream to ensure that the project remain on track, meets deadlines, and develops according to plan.

Ruchman and Associates Inc. (04/2018 to 07/2019). Adam supports the FBI's Criminal Justice Information Systems Division, performing criminal records retrieval services. He is entrusted to complete required work in a timely and accurate manner in an unsupervised setting.

United States Air Force (03/2012 to 04/2018). Adam is a Captain the USAF. His experience has included coordinating scheduling for multiple candidates to perform position interviews, taking Executive Member Committee (EMC) Meeting minutes, serving as a member of the squadron and wing level Company Grade Officer (CGO) Council, planning and executing multiple exercises and training events, and completing almost 1,000 hours of coursework while attending Undergraduate Cyber Training. He currently holds a Top Secret / SSBI / OPM security clearance.

CMS Insurance (10/2011 to 09/2018). As the IT Director, Adam planned, budgeted, and purchased the IT system in its entirety. This included configuring cloud storage and email services, maintaining



physical computers for employees across multiple states, keeping essential software accessible and up to date, and troubleshooting day to day issues.



Neal Winn

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since July 2021)
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Arts in English Language and Literature/Letters, Connecticut College

Overview

Neal is an IT Business Analyst focusing on Medicaid and social services with experience in data quality assurance, business and data analysis, and software troubleshooting. He has developed a knowledge base in all stages of software testing through his work with state agencies as well as his ability to communicate between diverse parties. He has strong recruitment and interview skills to accompany his ability to lead groups in training, project management, and deliverable review.

Relevant Experience

TEK Systems (07/2021 to present)

- **BerryDunn (07/2021 to present)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (07/2021 to present).**
Neal works as a Technical Lead/SME on the Technical Team of the WV PATH integrated eligibility project providing support and guidance to the overall project management team in the technical aspects of HHS program management areas for Child Welfare (CW), Child Support (CS), and Integrated Eligibility (IE). Software Development Lifecycle (SDLC) responsibilities include but are not limited to: Master Data Management (MDM), Data Conversion, Data Cleanup, Interfaces, Batches, Technical Deliverables, Security, and System Architecture. In this role, Neal also researches, reviews, and analyzes a broad spectrum of Policy, IT, and Security related areas of the Medicaid enterprise. As a Technical Lead/SME, Neal facilitates and coordinates the technical aspects required for end-to-end implementation of the IES solution. This includes proactive planning, coordination, validation, and successful implementation of all Interfaces, Batches required for the new PATH system. Neal works closely with the IES functional and technical business partners, IES vendor, trading partners, subject matter experts, and technical support teams to identify, track, and resolve issues/risks. He also assists with and/or coordinates troubleshooting of system issues/defects related to end-to-end processing of system issues. In addition, he monitors issues and performance, and provides a regular cadence of proactive communication to leadership and team peers in the form of verbal summaries and written status reports that includes; project status, pertinent issues, major milestones



and potential project risks, and issues. Neal provides analysis, review, and management of IES SDLC tenets and best practices in support of technical requirements verification and validation throughout DDI, Testing, and Go-Live. Additional duties include analysis, review, and management of vendor supplied formal Technical Deliverable documentation; regular participation in the formal project deliverable review/comment process, participation in staff/team meetings and trainings, proactive identification of relevant attendees for the subject matter, clearly articulated agenda and topics provided in advance, and well thought out meeting materials provided created and sent to attendees in advance. Additional responsibilities in this area also align with a regular cadence of communication provided prior to, during, and following each meeting to ensure attendees understand topics beforehand and are provided a concise summary of topics that were discussed/agreed as clear follow-up; frequent, clear, and consistent communication to the client, team members, vendor; successfully working independently with minimal instruction on multiple parallel threads of complex tasks while engaging in administrative tasks efficiently and effectively; performing thorough data integration and system analysis to understand and assess current connections among/between all impacted applications and entity and enterprise systems; and documenting Interface and Batch findings and requirements as part of the integration blueprint including detailed interface schematics to document data flow, transaction volumes, frequency, and other considerations.

State of Connecticut (11/2012 to 07/2021). Neal worked as an IT Social Services Analyst to process applications for client benefits in SNAP, Medicaid, and Cash for both state and federally funded programs. He became one of four AccessHealthCT (AHCT) Cadres focused on implementation of the CT Healthcare Exchange under the ACA with a focus in Medicaid, MAGI Medicaid, and CHIP as well as the technical, user acceptance, and training aspects of AHCT. As a member of the ImpaCT team, he contributed to the entire SDLC including design, requirements gathering, validation, risk assessment, reporting, UAT, data conversion, Enterprise Master Person Index (EMPI), and Interfaces/API. He researched, developed wrote, and executed scenarios for testing and analysis of the DSS ImpaCT eligibility management system for all programs including Medicaid, SNAP, CASH, and Long-term care. He worked on the backend batch processes and real-time interfaces utilizing QUALITIA, SELENIUM, SQL, XML, TOAD, WinSCP, remote DB's, and multiple front-end testing, and batch database environments. Neal performed data clean-up and conversion, provided support to users, identified, and resolved routine problems and system issue, and diagnosed and resolved processing issues. He participated in and tested the implementation of system upgrades and modifications. Neal also assisted with business process mapping and business requirement gathering and collaborated on technical programming requirements. He developed functional procedures and documentation. He developed a knowledge base in benefit modules and how they are integrated, mapping business processes, programming logic, validation testing, script writing, and other troubleshooting software. He interpreted and applied relevant agency policies and procedures as well as state/federal laws, statutes, and regulations.



Poise Inc. (07/2012 to 01/2013). Neal worked as recruiter and engagement manager to Contingent IT Workforce Recruiting and Staffing. Poise Incorporated is an international firm providing contract staff augmentation along with contingent and retained recruitment services.

CTWORKS - CareerTEAM LLC / KRA Corporation (01/2012 to 07/2012). Neal worked as an Ex-Offender Retention Specialist closely with Employment & Retention Specialists at to provide service to the ex-offender population in order that it will result in assistance with job search and retention of these clients. He referred participants to the Online Learning classroom and performed resume preparation and vocational assessments. Neal worked with community representatives on a regular basis, developed relationships with vendors and community agencies, and worked closely with temp agencies to find out which jobs accept people with convictions. He represented CTWorks in community meetings.

North American Family Institute (12/2010 to 01/2012). Neal worked as a Supervisor/Adolescent Development Specialist.

Vertical City Realty (2007 to 2010). Neal worked as a Residential & Commercial Leasing & Sales Agent

The Gersh Agency (2003 to 2007). Neal worked as a coordinator/assistant.

The Hartford (2002 to 2003). Neal worked as a business analyst.

**Robert Haughton, MPM**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since July 2018)
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Ph.D., Management, Information Systems Management, Walden University MS, Project Management, Keller Graduate School of Management BS, Engineering Technology, University of South Florida

Overview

Robert is a results-oriented IT management professional with a strong career history including extensive project management and quality assurance experience. With over 20 years of IT management experience, he is a skilled leader, highly resourceful and knowledgeable, with a proven track record of leading project efforts and managing high-performing teams.

Relevant Experience**BerryDunn (07/2018 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (07/2018 to present).**
Robert is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. As a PMO and testing SME, Robert reviews and provides input into project testing deliverables; and assists with project activities associated with testing. This includes, but is not limited to, interfacing with DHHR for UAT test scenario development; provides feedback on other process documents such as the Release Test Plan.

MERIDIAN TECHNOLOGIES (09/2016 to 12/2017). As a senior system test analyst under contract to BlueCross BlueShield of South Carolina, Robert was responsible and accountable for the coordinated test management of multiple related projects directed toward strategic business and other organizational objectives. He developed and managed formal test plans for desktop and web applications based on business requirements and technical specifications, collaborated with various project teams and internal/external customers to understand the business requirements for improving system design and functionality to increase overall business operational efficiency, and worked with internal customers on UAT criteria for final acceptance and approval for migration into production.

Office of the Fulton County District Attorney (2015 to 2016). Robert was an IT systems manager, responsible for providing desktop support for over 100 workstations and email and systems support within the District Attorney's office. He worked closely with attorneys to streamline operational



procedures and increase job efficiency by 45% for the attorneys and legal assistants in the office. In addition, he managed all staffing for a special project updating the final judicial dispositions in the Georgia Crime Information Center (GCIC) criminal history database using historical data to improve record and reporting accuracy statewide.

Cognizant Technology Solutions (2013 to 2015). As a lead senior test analyst, Robert worked on UAT test cases to test the implementation of a new corporate intranet site called MyLife by CVS Pharmacy. He gathered business use cases and test cases for document publishing and management system using SharePoint, updated the test case results in HP Application Lifecycle Management (ALM) for test tracking accuracy, and participated in sprint planning sessions, scrum meetings, and backlog grooming activities in an Agile/Scrum environment.

Xerox Corporation (09/2005 to 07/2013)

- **Lead Senior QA Analyst (07/2010 to 07/2013)**
Robert managed an onshore and offshore team of software testers responsible for the test case design and execution of business processes within the Redplant Eligibility subsystem to support the development and implementation of a new MMIS system using Java and Oracle. This included creating manual test scripts, simple and complex Oracle SQL queries for database verification for batch integration testing, and documenting software defects using IBM Rational Clear Quest for software quality and reliability.
- **Senior Software Developer (09/2005 to 07/2010)**
Robert represented the Georgia Medicaid Management Information System (GAMMIS) project during the annual Government Healthcare Solutions Disaster Recovery exercise. In this, he was responsible for running a simulation of a claims adjudication and financial reporting process. He performed all aspects of the full software development life cycle to include requirements gathering, analysis, design, development, testing, implementation, and maintenance. He also designed new batch processes increasing claim adjudication efficiency by 65%, and modified existing batch reporting processes for the Georgia Medicaid Health Check program to increase reporting efficiency by 50%.

**Milan Kelly**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since November 2021)
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Bachelor of Arts in Liberal Studies and Human Services, Southern Connecticut State University Master of Business Administration, University of Phoenix

Overview

Milan is a health care professional with 13 years of Medicaid, SNAP, TANF, Non-MAGI Medicaid program experience as both an Eligibility Services Worker and Social Services Analyst. Milan is familiar with Child Support Enforcement process as it relates to Medicaid, SNAP, and TANF program compliance and has a successful track record with project management office functions including but not limited to planning, generating reports, and implementation. She has experience with system maintenance and troubleshooting, utilizing JIRA and JAMA, and quality assurance for testing production environment defects, change requests, and design updates. She has participated in and tested the implementation of IES releases, upgrades, and modifications in various positions.

Relevant Experience**BerryDunn (11/2021 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (11/2021 to present).**
Milan works as a Technical Lead/SME on the Technical Team of the WV PATH integrated eligibility project providing support and guidance to the overall project management team in the technical aspects of HHS program management areas for Child Welfare (CW), Child Support (CS), and Integrated Eligibility (IE).

Diversified Services Network, Inc. (June 2021 to November 2021). Milan worked as an Eligibility Business Analyst to identify and resolve risks and issues impacting the progress and outcome of the project. Milan researched and provided recommendations on critical business decisions, assisted in leading the implementation and associated changes within their business area, and reviewed deliverables according to the schedule. She contributed to the project's overall understanding of business requirements for the IES and collaborated with other business areas to provide subject matter expertise and assistance as applicable. She was responsible for monitoring the project schedule, work plan, and budget for their business area to ensure project meets targeted dates and goals.



State of Connecticut Department of Social Services (March 2014 to November 2021). Milan worked as a social services analyst, specifically as a public policy and programs specialist in Medicaid, Medicare, Health Exchange & Medical Insurance, ACA, SNAP, Data Cleansing, Testing, Strategy, PMO, Quality Assurance, E-MPI, Toad, Selenium, SQL, WinSCP, PuTTY, Qualatix, Test Automation, and Regression. She developed, wrote, and executed scenarios for reporting and User Testing. Milan additionally provided customer support to users within assigned benefit module(s), resolved routine problems and system issues, and assisted with diagnosis and resolution of common eligibility processing issues. Milan assisted with business process mapping and business requirement gathering. She collaborated with information technology staff concerning technical programming requirements, assisted with implementation of system upgrades and modifications, and loaded data into test environment. Milan developed reports specific to assigned module(s) utilizing ERP system then tested data produced from reports ensuring integrity of data and results. Milan also assisted with identification, development, and execution of training related to ERP system and assigned modules.

State of Connecticut Department of Social Services (May 2008 to March 2014). Milan was as an eligibility services worker responsible for determining eligibility for State and Federal funded benefits such as Medicaid, SNAP, and SAGA for low-income residents of the State of Connecticut. She processed and reviewed required verification to obtain and validate demographic information including residency, background data, immigration status and financial information. Milan also evaluated and examined eligibility submissions to identify any missing data and to certify information provided as well as reconcile discrepancies. She conducted interviews, requested additional information as necessary or performed collateral contact, and completed tasks necessary to monitor and manage cases.



Nora Gilligan, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since July 2020)
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Master of Public Administration, Baruch College, School of Public Affairs BS, International Health, Georgetown University

Overview

Nora Gilligan brings more than eight years of direct policy analysis with health and human services programming across federal, state, and local levels. Thorough knowledge of Temporary Assistance for Needy Families (TANF) program policy and administration at state level, including comprehensive understanding of related program compliance and eligibility requirements (e.g., Medicaid, Medicare, Child Support, and Supplemental Nutrition Assistance Program (SNAP)). She has spent several years collaborating with federal and state CMS policy efforts, including serving as liaison on an HHS work group on Medicare, Medicaid, and Affordable Care Act (ACA) integrated eligibility.

Relevant Experience

BerryDunn (07/2020 to present). Nora transitioned to a full-time employee in July 2020. She continues to work on the WV PATH project as the Certification and Compliance Team Lead, managing the development of review materials for Federal partners to secure FFP.

TEKsystems (09/2018 to 07/2020).

- **BerryDunn (06/2019 to 07/2020)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (06/2019 to present).**

Nora played an integral role on the West Virginia (WV) People's Access to Help's (PATH) Certification and Compliance team, preparing the state for integrated eligibility system (IES) assessments by multiple federal agencies. Nora leverages subject matter expertise in several program areas to lead research, analysis, and tracking of federal certification requirements for WV PATH:

 - Maintained relationships with State business partners to manage WV Department of Health and Human Resources (DHHR) review of programmatic criteria sets, to provide evidence of system compliance and ensure full Federal Financial Participation (FFP) from federal partners.



- Provided guidance to the State's IT contractor throughout the systems development lifecycle, ensuring system configuration and test evidence are aligned with both state and federal policy and legislation.
- Employed research and analysis skills to respond to project-wide policy questions.
- Trained a team of three in Certification and Compliance's criteria mapping exercise, expanding the team's capacity to meet deliverable deadlines

ICF (11/2015 to 07/2017). Nora consulted directly with federal, state, and nonprofit clients on strategy and policy analysis, program management, and project evaluation, specifically in areas of family self-sufficiency, workforce development, and access to healthcare through CMS. She leveraged her knowledge of CMS program eligibility criteria to inform research, analysis, and writing for national and local resource scans for nonprofit client Year Up. Other projects include collaborating with Colorado Department of Health Care Policy and Financing to ensure timely provision of Medicaid services to TANF clients, in developing baseline metrics for state's employment-focused, family-centered TANF program; researching, selecting, and coordinating with CMS program subject matter experts from CO, FL, NY, and VT to communicate critical information and updates to clients, colleagues, and other stakeholders relative to TANF, Medicaid, ACA, and mental health services integration; and providing implementation science technical assistance to WV human services agency to guide development of data-driven outcomes measures, resulting in adoption by state workforce development council and \$250,000 contract for continued work.

US Department of Health & Human Services (02/2011 to 11/2015). As Special Assistant to the Director, Nora provided direct management, policy guidance and chief administrative support to appointed directors in the Office of Family Assistance. Tasks Included:

- Represented TANF on HHS/ACF Chief Medical Officer's work group, providing information and guidance to ACF Assistant Secretary around Medicaid and ACA outreach and education efforts and assumed eligibility policy with state CMS programs.
- Performed extensive literature review of HHS Office of the Assistance Secretary for Planning and Evaluation interviews with state TANF and Medicaid programs to inform guidance to states on collection of housing status and homelessness data from TANF and Medicaid program applicants.
- Developed knowledge-base around Medicaid eligibility criteria and other supportive services and programs, to collaborate with 19-member Interagency Workgroup on Family Homelessness in development of guidance and technical assistance strategies to educate national, state, and local stakeholders on coordinated entry and integrated CMS eligibility efforts.
- Wrote and published guidance on TANF and family homelessness, managing an internal team of 12 and coordination with other federal and external offices throughout review and approval process, to offer states interpretation of flexibilities offered within TANF legislation to address housing and related needs.



- Created social media engagement plan and established Twitter presence across office programs, building direct access to and dialogue with state and local constituents, policy and advocacy groups, researchers, and other stakeholders.
- Established formal Director of Communications role after taking ownership over internal and external communications and relationship-building, including drafting and editing Director's talking points and blog posts, leading site visits across US states and territories, and representing Director at meetings with grantee organizations, foundations, and state agencies.
- Developed management tool and system to track deliverables across 5 program offices and 10 regional offices, streamlining director's updates to department leadership and leading to implementation of up-to-date schedule for publishing program data.

Papercut Magazine (10/2009 to 05/2013). Nora was a founding member of this monthly online publication with mission to be platform for emerging musicians, photographers, visual artists, and designers. She led qualitative needs assessment and market research to direct company's branding and target audience, contributing to vision for website, content development and marketing strategy.

City of Oakland (08/2008 to 06/2009). As a policy analyst, Nora worked directly with Workforce Investment Board (WIB) Director in Mayor Ronald Dellums' office, toward Master of Public Administration (MPA) practical work experience. She conducted an evaluation of local workforce development programs and researched policy issues relevant to Workforce Investment Act legislation and American Recovery and Reinvestment Act funds, informing Director's reports to City Council and increasing business sector membership on the local WIB.

U.S. Department of Health & Human Services, Office of Global Affairs (10/2006 to 05/2008). Nora assisted the Deputy Director for Policy in her provision of policy guidance and strategy around global and refugee health issues inter-governmentally and internationally. She researched, analyzed, and edited health policy documents relevant to priority initiatives, resulting in draft briefing materials for United Nations General Assembly and World Health Organization Executive Board meetings. She also participated in multilateral special projects as project manager for Security & Prosperity Partnership of North America and point-of-contact for 2007 Global Health Security Initiative Ministerial, developing diplomatic skills.

**Meghann Slaven**

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

Overview

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

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

- **West Virginia Department of Health and Human Resources (DHHR) - Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 to present).**
As a deputy project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, and proposal evaluation processes. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Meghann assisted the project team in developing a data governance roadmap.
- **West Virginia Bureau for Medical Services (BMS)**
 - **Enterprise Program Management Office (EPMO) Project (07/2019 to present).**
As a business analyst, Meghann assists West Virginia in developing and updating its HIT Plans, including the Medicaid Information Technology Architecture (MITA) HIT Companion and the annual HIT and HIE APD, to help the client gain over \$9 million in federal funding for HIT activities and initiatives.
 - **Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 to 09/2019).**
Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to



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

- **Gap Analysis and Project Management Services (10/2017 to 06/2018).**
As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of the capstone project deliverable. As part of a team analyzing over 2,600 impacts from the Affordable Care Act (ACA) on West Virginia Medicaid's policy, systems, and business processes, Meghann assisted with research, writing, and assessment activities to support the development of a compliance gap analysis deliverable.

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

College Summit (04/2011 to 07/2014). Meghann served as the school partnership manager, providing consulting and management of College Summit program to partner schools in West Virginia. She trained and supported educators in delivery of College Summit curriculum and online tools; met with school counselors, educators and administrators on a bi-monthly basis to ensure school performance according to milestone achievement; guided students through processes to ensure postsecondary success; and facilitated meetings to track progress and share data measurement and analysis.

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

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



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

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

**Eugene Horowitz, PMP, CSM**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since August 2019)
Years of Experience Relevant to Proposed Role:	36 years
Certifications and Education:	MS, Technology Management, Stevens Institute of Technology Executive Master of Technology Management (EMTM) program BA, Sociology, University of Delaware Project Management Institute – Certified Project Management Professional #34178 Certified Scrum Master

Overview

Eugene is an experienced technology-based program and project manager, testing manager, change manager, consultant, strategic planner, business developer, contract manager and systems engineer. He has extensive management and technical experience spanning multiple industries; including positions in software development and testing, IT infrastructure, operations, professional services and finance.

Relevant Experience**Trigyn Technologies (09/2016 to present)**

- **BerryDunn (08/2019 to present).**
 - **West Virginia Peoples' Access To Help (PATH) – People's Access to Help (PATH) DDI Project Management (08/2019 to present)**
Eugene serves as the State project lead for all PATH Change, Risk, and Issue Management responsibilities. This encompasses ongoing collaboration with vendor (Optum) counterparts and West Virginia Department of Health and Human Services (WV DHHR) stakeholders; including identification, documentation, coordination, and reporting of changes/risks/issues, and driving their resolution and/or mitigation.
- **New Jersey Replacement Medicaid Management Information System (R-MMIS) – State User Acceptance Testing Manager (05/2017 to 06/2019).**
Eugene manages a staff of eight QA testers. He is responsible for the creation of UAT scenarios and test cases covering all testable requirements (>1,900 testable requirements, >2,000 test cases), as well as end-to-end UAT planning, coordination, execution, reporting, defect management, and signoff.
- **New Jersey Replacement Medicaid Management Information System (R-MMIS) – State Change Manager (09/2016 to 05/2017).**



Eugene was responsible for the change request process, facilitation of State meetings, State review (Configuration Control Board representation), tracking, and reporting.

Structure Networks (04/2016 to 09/2016). Eugene served as the senior project manager for data center migration with Mercedes Benz USA. He was responsible for application migration of all Mercedes Benz USA applications in conjunction with closure of its Montvale, NJ Data Center. This included integrated planning (hardware and software), coordination of application and technical resources, dependency analysis, migration strategy and scheduling.

Bank of America Merrill Lynch (11/2009 to 11/2015). Eugene served as both vice president and service delivery manager, providing program management of multi-year, multi-million dollar data center and desktop transformation projects within Global Wealth Management Technology.

Ernst & Young (03/2007 to 11/2009). As a senior project manager, Eugene provided end-to-end management of mission critical IT infrastructure projects in Global Operations Systems (GOS) organization (planning, oversight of technical project teams, procurement, reporting, customer relationship management, budget oversight). He managed critical components of US global data center migration project, which was completed on-time, within budget, and without major incident. He also delivered multiple projects ahead of schedule enabling Assurance and Advisory Business Services (AABS) systems to meet capacity demands for busy season, and successfully implemented emergency upgrades to Global Audit Methodology (GAM) Infrastructure during peak busy season for E&Y auditors worldwide.

Telesciences, Inc. (2002 to 2006). As the director of program management, Eugene was responsible for the coordination and management of company-wide Project Management Office (PMO), project management processes and personnel in multiple locations worldwide. He provided end-to-end management of strategic projects with key customers; including contract negotiation, project planning, budget control, ongoing customer interaction and internal project team management.

Telcordia Technologies (1984 to 2001)

- **Senior Project Manager/Systems Engineer (1993 to 2001).**
In this role, Eugene carried out program management, project management, consulting and systems engineering functions with established and new-entrant telecommunications carriers. He executed business development, user group and project team leadership; and interfaced with customers on business and technical issues.
- **Billing Consultant/Operations Systems Strategic Partner (1988 to 1993).**
Eugene analyzed impact of new telecommunications services on customers' billing operations. He identified and resolved issues with customer and internal user groups, participated in corporate teams representing clients' functional and data requirements for future billing operations, and led operations systems planning project teams.
- **Lead Project Manager, Information Technologies (1986 to 1987).**
Eugene coordinated production, development and maintenance activities on mainframe



applications system, including management of 35-40 software development, operations and support staff.

- **Manager, Regulatory Support (1984 to 1986).**

Eugene provided ongoing system administration, database administration and training on software system that enabled access to corporate regulatory information. He researched and provided information to regulatory subject matter experts for use in testimony in state public utility commission hearings.

Publications

Telecommunications Reform will have Impact on LEC Billing, Communications Billing Report, August 1996.

Implementation Challenges for PCS Billing: Tackling the Technical and Regulatory Issues, IEEE Conference on Networks for Personal Communications, March 1994.



Andrew Dornon

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since August 2021)
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Business Administration in Healthcare Management, Marshall University

Overview

Andrew has more than 7 years' experience with healthcare organizations. He has strong project management support experience coordinating with team members to find effective solutions. His ability to focus on a variety of client-facing projects simultaneously and communicate effectively in tandem with his clerical skills, enhance his performance in support roles.

Relevant Experience

BerryDunn (08/2021 to present).

- **BerryDunn (08/2021 to present)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (08/2021 to present).**
Andrew is a project coordinator for the People's Access to Help (PATH) project. He 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).

Cabell Huntington Hospital (January 2021 to August 2021). Andrew works as a clerk to execute documentation tasks, manage and support client/patient interactions, and provide quality customer service. He performs basic bookkeeping, as well as note-taking and updating charts. In addition to organizing, scheduling, and coordinating patients for testing, he receives COVID samples from various locations, orders the tests via the Cerner system, and prepares the samples for testing. It is his responsibility to deliver results and communicate with patients.

Huntington Internal Medicine Group (March 2018 to May 2020). Andrew worked as a purchasing assistant to place and receive inbound orders, create purchase orders, and confirm contract pricing. He updated purchasing databases as needed and maintained SDS files on inventory items. Andrew also communicated with vendors to source supplies and equipment and maintained schedules and customer service. Andrew also worked in accounts payable to process checks for outstanding vendor accounts and kept record of those checks.



Marshall University (August 2014 to May 2018). Andrew worked as a coordinator to contribute to healthcare leadership needs, recruitment and fundraising. He recorded meeting minutes, completed heavy documentation needs, created memos, scheduled, coordinated meetings and events, and performed in a customer and student facing capacity.



Buffy Cranford

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

Overview

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

Relevant Experience

BerryDunn (12/2019 to present).

- **West Virginia Department of Health and Human Resources (DHHR) – People's Access to Help (PATH) DDI Project Management (11/2020 to present).**
As a senior consultant, Buffy serves as the OCM Lead on the West Virginia People's Access to Help (WV PATH) project. She manages the identification, development, and implementation of organizational change management and operational readiness activities. This includes updating and expanding the OCM Project Plan in alignment with the RFP, tracking and producing OCM deliverables, providing status reports for OCM and Training responsibilities and tasks, and working in collaboration with the state of West Virginia to streamline communications.
- **West Virginia Bureau for Medical Services (BMS) – COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).**
She has also led the COVID-19 task tracking team and built strong relationships with State Bureaus by coordinating communications, escalating tasks, and monitoring the progress of tasks and adherence to Federal governance. As a senior consultant, Buffy serves as the OCM



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

Cognosante (08/2018 to 11/2019). As a senior associate and organizational change manager, Buffy has served as the OCM Lead on numerous projects, primarily Medicaid and Economic Assistance eligibility and their associated programs, and the Arkansas Juvenile programs. She managed all aspects of Organizational Change Management for Medicaid Eligibility, based on all requirements set forth in the RFP. This included collaborating with State and System Integrator teams in creating goals, timelines, deliverable expectation documents, and project status reports; serving as a track expert in design and JAD sessions of the new eligibility systems for Medicaid and Economic Assistance; and reviewing resolutions in finalizing OCM, training, communications, change impact, knowledge transfer, and roll-out plans.

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

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

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

ACCESSNebraska Lincoln Customer Service Center (06/2013 to 04/2016). Buffy oversaw the direction and organization of the Medicaid and Long-Term Care services. She performed organizational change management analysis, reorganized the Lincoln Customer Service Center, assigned workers



into skill sets, minimized phone queues, and reduced call wait times from forty-five minutes to five minutes or under for over two years. She created and implemented yearly strategic plans for both Customer Service Centers by examining resources, goals and objectives of the agency; updated and monitored performance metrics and developed dashboard monitoring strategies to ensure clients received efficient and accurate customer service; collected and analyzed data and trends for the Medicaid and Long-Term Care call centers, and implemented strategies to increase service levels; directed multifunctional programs, improved efficiency, and increased the monthly quality assurance accuracy percentage with an average of 97.5 to 98%; and reviewed interactive voice response systems to reduce phone queues and improve customer service, and served on a workgroup reviewing upgrades to the interactive voice response systems.

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

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

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

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

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



Michelle Lavallee, MSW

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since November 2021)
Years of Experience Relevant to Proposed Role:	21 years
Certifications and Education:	Master of Science in Social Work, Columbia University Bachelor of Arts in Government, Wheaton College Prosci Organizational Change Management Certificate Lean Green Belt

Overview

Michelle is a seasoned health professional with more than two decades experience Public Sector Health and Human Services leadership and management. She has developed a strong background in system and program design, development, implementation and operations, as well as Organizational Development and Change Management. Michelle worked closely with various agencies on fiscal oversight, budget development and monitoring, procurement, grant writing, contract management, and quality improvement all while training and leading innovative teams.

Relevant Experience

BerryDunn (11/2021 to present).

- **West Virginia Department of Health and Human Resources (DHHR) – People’s Access to Help (PATH) DDI Project Management (11/2021 to present).**
As a consultant, Michelle serves as the OCM team on the West Virginia People's Access to Help (WV PATH) project. She manages the identification, development, and implementation of organizational change management and operational readiness activities.

University of Massachusetts Commonwealth Medicine (March 2021 to October 2021). Michelle worked as a senior project and portfolio manager responsible for leading large scale and highly visible projects for Project Management Office. She provided senior level consultancy services to external clients, supported project team members as a coach and mentor, and regularly engaged with C-Suite leadership. She developed standard project management documentation and tools and assisted project sponsors in aligning projects with organizational and strategic goals.

Vermont Department of Mental Health (January 2018 to October 2021). Michelle worked as the director at the Middlesex Therapeutic Community Residence to provide leadership and strategic direction for locked psychiatric residential recovery residence for adults with severe and persistent mental illness. She managed a team of 30 staff and oversaw a \$3M budget while planning, organizing, managing, and monitoring work at an executive level. Responsible for hiring and supervising staff.



Michelle was responsible for daily operations to comport with State licensing regulations. She established partnerships with key stakeholders to ensure effective and efficient patient flow throughout the system of care and oversaw the development of new policies to match changes in practice and operational need.

Vermont Department of Health Access (December 2011 to January 2018). Michelle worked as the organizational change management director for the Health and Human Services enterprise as part of large-scale systems transformation on behalf of Vermont's Human Services Medicaid IT modernization efforts, as part of Federal Healthcare Reform. She worked in close collaboration with executive sponsors, program, and project managers. She provided consultative services and delivered change readiness trainings for stakeholders. Additionally, Michelle developed and implemented Tuck Business School Executive Coaching Program, and developed Lessons Learned processes for Project Teams. She performed OCM activities with the goal of end user awareness, readiness, and solution adoption, using analytic tools to size the change for level of effort and resource need. Developed OCM strategies for stakeholder visioning, engagement and culture change.

Vermont Department of Mental Health (April 2007 to December 2011). Michelle worked as the acute care chief to oversee the state-wide system of acute psychiatric care. She supervised the team that managed Medicaid for inpatient hospitalizations and performed utilization review and care management. She was responsible for data analysis and reports to stakeholders to inform them of statewide utilization of inpatient resources. She prepared annual reports to the Legislature, responded to requests and inquiries from Legislators, general public, and stakeholders, and managed children's inpatient psychiatric admissions. Michelle also acted as project manager for Electronic Bed Board and as contract manager for various system resources. She managed Grievance and Appeal process for Medicaid beneficiaries and deployed during Tropical Storm Irene to manage and administer FEMA Disaster Mental Health Grant.

University of Vermont Medical Center (December 2005 to April 2007). Michelle worked as a senior social worker to provide leadership and advocacy to social workers within a blended Department of nurse case managers and social workers. She oversaw social work care management and utilization management. She analyzed data for trends in hospital-wide UM, prepared reports for hospital leadership, and consulted on complex discharges. Michelle also developed career ladder with the goal of salary parity for social workers within the Department. She performed Root Cause Analysis for internal abuse/neglect investigations, in conjunction with Director of Risk Management, and provided clinical supervision for hospital social workers and UVM School of Social Work MSW students.

The Guidance Center (July 2000 - December 2005). Michelle worked as the director of Social Services to manage daily operations for locked inpatient psychiatric hospital. She was responsible for recruitment, hiring, and staff supervision. She managed a team of 25 staff and oversaw Medicaid Utilization Review and Management. Michelle ensured ongoing compliance with JCAHO, CMS, and State standards, monitored quality of work performed on unit, and developed and implemented multidisciplinary teams. She also acted as a forensic mental health evaluator and as agency liaison to Coconino County Jail. She provided clinical supervision to Northern Arizona University MSW students.



**Frank Matina**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since December 2017)
Years of Experience Relevant to Proposed Role:	21 years
Certifications and Education:	BS, Systems Analysis and Design, Elmira College Project Management Professional (PMP), Project Management Institute Certified Data Processor (CDP), Institute for Certified Computer Professionals Certified Scrum Master (CSM), Scrum Alliance, Inc.

Overview

As a tactical leader, Frank brings strong analytical and solution development skills combined with over 21 years of program and project management experience to bear on the most challenging scenarios. Beginning in 2003, he began taking on both large and small independent contracting and consultancy projects in educational, private sector and government organizations. By combining broad experience and knowledge in the fields of information technology, finance, administration, human resources, training, and policy, he provides a unique perspective focused on deep needs assessment and tailored solution implementation.

Relevant Experience**BerryDunn (12/2017 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (12/2017 to present).**

Frank provides support to the State Project Management Office (SPMO) for the Integrated Eligibility Solution (IES) project. After Frank was involved with project deliverables and monitoring of the Vendor's project schedule, he has moved to the State Liaison Team that has helped the State through major activities involving the design validation, System Integration Testing results review and then to User Acceptance and Operational Readiness.

Molina Healthcare (06/2011 to 12/2017). Frank served as the director of implementation, providing vision and strategic leadership in the planning, execution and delivery of large and complex Medicaid Management Information Systems (MMIS). He managed the assessment, plan and execution of outstanding work following a major implementation for the State of Idaho resulting in a successful closeout and 100% client satisfaction. Other projects include the successful delivery of Molina's Health PAS 4.7 upgrade project in 2011-2012 for the State of West Virginia, the implementation of Molina's Health PAS 5.0 Medicaid Management Information System to the State of West Virginia on-time and within budget, stabilization of the Molina West Virginia Account operations and covered for account



management throughout 2016, and continued support of account management and customer relationship working on Internal Molina process improvements, providing executive oversight to support new State of West Virginia initiatives and ensuring operations continue to meet service level agreements and other enhancements to the system.

FourThought Group (03/2011 to 06/2011). As the contract CIO, Frank provided executive level services with a concentration on project management assessments for several strategic healthcare clients. He assisted organizations in establishing a PMO framework utilizing best practices and lessons learned.

Gabriel Systems (03/2010 to 03/2011). For the Georgia Department of Community Health, Frank directed MMIS Readiness and Acceptance Testing Phase managing 15 project managers spanning 32 business areas and 150 testers. The team developed over 12,000 test cases including comprehensive MITA business process scenarios.

Kaiser Permanente (08/2009 to 03/2010). Frank served as a member of Kaiser Mid-Atlantic Region Information Technology Project Management Office as a program manager for a major health plan focused on both clinical and revenue cycle based application projects.

CGI, Inc. (02/2009 to 08/2009). As a contract consultant, Frank was a member of the Medi-Cal Partnership proposal development team consisting of CGI, ACS, and IBM. He performed the detailed analysis and responses for the requirements related to the Quality Management organization and its approximately thirty staff members in support of this contract.

Fox Systems, Inc. (03/2001 to 12/2008). As project manager for Fox System's premier independent validation and verification (IV&V) engagements, Frank successfully directed concurrent project teams with P&L responsibility. He directed numerous projects where the results had considerable positive impact to the clients' billion-dollar program operations and MMIS implementations. Project core competencies include project management office, procurement services, program analysis, quality management oversight, user acceptance testing and business process improvement.



Allison Marler, MDIV

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since July 2021)
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Bachelor of Science in Workforce Education with a focus in Training and Development, Southern Illinois University Masters of Divinity, Moody Bible Institute

Overview

Allison is a general project manager with 19 years of experience in social services and Medicaid. She is highly skilled in performing problem solving tasks, conducting research analysis, and working with multiple groups to convey information and solutions. She has developed excellent Interpersonal skills like organization and time management and excellent communication skills with various groups in a community. She is skilled in leadership of testing teams and has a strong knowledge base of Kanban, Scrum, and Agile.

Relevant Experience**TEK Systems (July 2021 to present)**

- **BerryDunn (04/2019 to present)**

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (03/2022 to present).**

Allison works as the Organizational Change Management (OCM) Lead to lead the support of activities between state staff users, vendors, clients, providers, and stakeholders in order to maximize user adoption of the project system called WV PATH while adhering to critical path deadlines. This work was completed in collaboration with the training, development and communication teams from the state of WV business coordinators team and the training team as well as the vendor OCM team in order that state senior leaders and trainers would be equipped to serve as advocates and catalysts to drive change. Allison routinely led meetings with the state resources and vendor staff to collaborate and carry out the organizational change management activities and designated tasks for completion. Allison gathered the resources who would be needed for OCM related activities and coordinated the scheduling with the vendor. Allison also created and led meetings of presentations such as Powerpoints, newsletters, and other state facing presentations and materials to assist the state with informing staff of upcoming events and information related to the WV



PATH project. Allison worked in collaboration with the state resources, the vendor and the SPMO team to develop and collect ADKAR survey information needed in order to analyze and target where additional project communication efforts needed additional support for the 3 releases of WV PATH (Child Support, Child Welfare, and Integrated Eligibility). Allison coordinated the supports identified and needed out of necessary research analysis activities. Allison developed and maintained a system of organization to ensure that all OCM activities were being carried out timely to support the WV business coordinators for all 3 releases. Allison worked in collaboration with the WV State Trainer Team to track and review training related documentation and deliverables and in the communication process for the coordination of meetings to review said documentation/comments deliverable review process. Allison participated in quality control efforts to ensure that guidelines and timelines were adhered to.

- o **West Virginia DHHR - Child Welfare Release (07/2021 to 02/2022)**

As Release Coordinator, Allison led the daily morning meeting with the WV State Child Welfare (CW) Business team to coordinate efforts related to the design validation process and the testing process. Allison coordinated all design validation support activities related to the WV State Child Welfare Team such as the scheduling of additional design validation meetings and coordination of meetings with the vendor or other SPMO teams. Allison led and assisted with the development of the WV State CW Weekly Touchpoint report and facilitated the weekly meeting with the WV CW Business Coordinators. Allison led design validation review meetings to review information with the CW Business Team as needed via Zoom/Teams. Allison logged change impact tickets and maintained a tracking system. Allison performed data analysis for the design validation phase and relayed this information to the CW Business Coordination team to utilize as a tool during the design validation process. Allison conducted assignment designations in SharePoint and coordinated all related activities with the vendor and the SPMO team. Allison provided team updates in daily team scrums and assisted in the coordination and completion of outstanding activities.

State of Connecticut Department of Social Services

- **Social Services Analyst (10/2013 to present)**

Allison worked as a social services analyst to collect data for the initial business requirements for the ImpaCT project (Medicaid/Medical requirements) and participated in the Design Sessions for the Application Registration module, Data Collection module, Correspondence module, Conversion and mapping process, Fair Hearings module and Renewals module. She reviewed the Business System Design documents that came from the design sessions and submitted comments to developer for review and then participated in the review process. She researched design documents in SharePoint to write and execute scenarios for UAT (User



Acceptance Testing) and documented defects discovered during testing. Allison also notified business leads of potential training issues/process bulletin needs for field offices, maintained a tracking system of open issues in JIRA, and retested open issues. She participated in the change request process, in-person meetings with the development team and business leads, and Microsoft Teams/Zoom meetings to troubleshoot issues and resolve problems. Allison led team scrums daily and collaborated with IT staff to execute scenarios such as batches, environments, interfaces, printing, and task implementation. She worked on data cleanup and conversion activities, diagnosed, and resolved eligibility processing issues; and developed process documentation and an ahCT training guide. Allison trained other testers in scenario development, testing processes, eligibility troubleshooting matters, usage of the new integrated eligibility management system, and helped troubleshoot issues. She developed an understanding of Medicaid programs, policy, procedures, and eligibility determination in both ImpaCT and the State exchange eligibility system. In particular this required locating and analyzing both Federal and State regulations as they pertain to Medicaid programs, developing skills in quality assurance oversight for Medicaid testing, and leading a team for Medicaid UAT testing to ensure the completion of tasks and test execution according to proposed deadlines.

- ***Eligibility Services Worker (12/2006 to 10/2013)***

Allison worked as an eligibility services worker to obtain necessary information for the determination of services and public assistance. She researched, verified, and evaluated client statements and other documentation to ensure compliance with program eligibility requirements. She entered, maintained, and updated all relevant case eligibility information in the Eligibility Management System database. She upheld strict confidentiality for clients and processed redetermination services to ensure correct client benefits level. Allison also assisted clients with application and receipt of federal, state, and municipal social services benefits, and acted as a community liaison with local, state, and federal agencies regarding the determination and coordination of client eligibility and awards. She informed clients, social service agencies, attorneys and the public about program details and prepared summaries and case notes accordingly. Allison represented the agency in the Fair Hearings process and maintained a working knowledge of and ability to interpret and apply relevant agency policies and procedures, as well as those of at the state and federal level. She developed a knowledge of available community support and social services resources for clients, as well as developing a knowledge base of individual/family financial practices and investments.

State of Florida, Protective Services (10/2002 to 11/2005)

Allison worked as protective services worker/foster care placement case manager to provide case work services including assessing child safety, putting preventative measures in place, preparing judicial reports, attending court hearings, and carrying out judicial orders. She developed and maintained a knowledge base of child safety practices and policies and obtained medical, physical, and social histories of clients. She conferred with clients, relatives, professional associates, community providers and other social welfare agencies regarding case problems and case management services. She also assisted in placing children with families/foster care and interpreted the results of investigations. Allison recruited and selected foster/adoptive homes and consulted with psychologists, psychiatrists, and other



staff to develop and administer treatment plans. She consulted with community groups to determine appropriate referrals and develop community resources.

**Dawn Webb, BSHL, CPC, COC**

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

Overview

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

Relevant Experience

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

- **Enterprise Project Management Office (EPMO) (05/2019 to present).**
As quality improvement initiatives program manager, Dawn is providing project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, Payment Error Rate Measurement (PERM), and Third-Party Liability Procurement projects.
- **TPL Procurement (5/2019 to present)**



Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.

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

State of Alaska, Division of Legislative Audit (DLA) – National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 to 09/2019)

Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

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

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

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

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

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



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

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

**Susan Chugha**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since October 2015)
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	BA, Business Management, Belmont Abbey College

Overview

Susan has over 14 years of administrative management experience, as well as five years' experience in consulting work. She has excellent organizational skills, experience with research and project coordination, and experience with various scheduling programs.

Relevant Experience

BerryDunn (10/2015 to present). Susan works with state Medicaid agencies, focusing on project coordination and support. She began with BerryDunn as a subcontractor through TEKsystems in 2015 before joining the firm full-time in October of 2016.

- **West Virginia Bureau for Medical Services (BMS).**
 - ***Substance Use Disorder (SUD) Walver Initiative Project (10/2016 to present).***
As project manager for phase 3 of the SUD waiver Initiative, Susan is responsible for providing oversight to the project team. She is responsible for the day-to-day activities, meeting facilitation, monitoring progress against the agreed-upon project summary and schedule, as well as deliverable review. She performs research on SUD services, CMS requirements, and State policies and procedures to support the waiver activities. Before becoming the project manager, Susan was project coordinator for phases 1 and 2. As project coordinator, Susan was responsible for project coordination which included client outreach, scheduling, notetaking, research, and business analysis. During phase 2 she managed the development of a peer recovery support specialist webinar and has been involved in policy development.
 - ***MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to present).***
Susan moved into the project manager role in November 2019 for the MITA 3.0 2018 SS-A maintenance and annual update project. She is responsible for providing oversight to the project team, managing budgets and project deliverables, as well as working closely with the client to ensure requirements and expectations are fully met. Prior to this role, Susan was the lead project coordinator for daily project activities, responsible for project communication, quality checks on files and templates, and meeting management. She also assisted with the maintenance and management of the MMP site which included uploading files, updating relevant information as needed,



ensuring that the appropriate individuals are granted access, and contributing to the design of dashboards and all other aspects.

- ***State Plan Review and Support (SPRS) Project (03/2020 to 11/2020).***
As an analyst for the SPRS project, Susan reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages are in compliance, compared service descriptions to federal and state guidance, and analyzed pages for overall accuracy.
- ***Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to 12/2018).***
As the project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.
- ***Provider Enrollment Application (PEA) Project (02/2017 to 11/2017).***
Susan provided project coordination assistance by maintaining all of the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV provider enrollment application process.
- ***ICD-10 Transition Planning and Implementation (10/2015 to 02/2016).***
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

Independent Consultant (08/2010 to 10/2014). Susan currently works with her clients to help with event planning, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.

Columbia Management (09/2012 to 10/2013). As a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the US to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

Evergreen Investments (06/2004 to 05/2009). Susan served in multiple roles for Evergreen Investments:

- **Project Specialist – Assistant Vice President**
 - Lead Project Specialist for semi-annual Global Distribution Summits.



- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the US and assisted with follow-up after each program to track our successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.
- **Communications Coordinator/Project Manager – Officer**
 - Created quarterly newsletters and other publications that were distributed internally.
 - Coordinated the Mutual Funds, Sales and Operations (MFSO) program for wholesalers.
 - Managed the valued-add and continuing education curriculums that were available to field wholesalers.
 - Partnered with Learning and Development Managers to assist in coordination of training programs and on-boarding for new internal and external Wholesalers.

Bank of America Capital Management (formerly Nations Funds) (04/2001 to 05/2004). Susan served as an executive administrative assistance and office manager, supporting both the Managing Director of Global Distribution and the Director of Internal Sales. Her administrative duties included answering phone calls, scheduling meetings, book travel arrangements, process expense reports, minute taking & distribution, coordination of meetings and conferences for office professionals. In addition, she created PowerPoint presentations, monthly reports, territory maps, emergency contact lists, etc.; organized and scheduled internal trainings and maintained relationships with business partners; and maintained office and office equipment that supported over 50 associates.



Sarah Ratliff, MBA, Prosci®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since June 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

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

**Lisa Roberts**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since February 2021)
Years of Experience Relevant to Proposed Role:	30 years

Overview

Lisa is a highly capable hands-on leader with a demonstrated ability to enlist the enthusiasm and participation of internal staff and external customers. She brings expertise with public programs including TANF, SNAP, CHIP, Medicaid, and Developmental Disabilities programs. Her experience includes managing government contracts and budgets, overseeing multi-state programs, and building strong professional relationships.

Relevant Experience

BerryDunn (02/2021 to present). Lisa is a Senior Consultant in BerryDunn's State Government Consulting Group, focusing on assisting state agencies with overall program management, procurement support, strategic plan implementation, and process redesign projects. Lisa is currently dedicated to the following project:

- **West Virginia Department of Health and Human Resources (DHHR) - *Child Welfare Initiatives Project (02/2021 to present)***

Lisa is a Child Welfare Lead for BerryDunn and manages the team focused on statewide child welfare reform to improve outcomes and reduce unnecessary out of home placements for children across West Virginia. The child welfare effort requires cross agency collaboration with the Bureau for Social Services (BSS), Bureau for Medical Services (BMS), and the Bureau for Behavioral Health (BBH). This multi-year project includes program and process improvement, policy development and implementation, stakeholder engagement and significant focus on continuous quality improvement including data and reporting.

Embassy Management, LLC (May 2009 to February 2021)

- **Executive Vice-President of Operations and Workforce Services (March 2013 to February 2021).** In this role, Lisa has oversight of four Operating Companies providing services in New Mexico, California, Washington and Oregon. Government funding sources and contracts that she is responsible for managing include:
 - Medicaid Waiver Services in California, Washington and Oregon.
 - Federal TANF funding for a statewide program throughout New Mexico
 - County funded services throughout Washington.
 - Residential services for individuals with a Developmental Disability in Los Angeles and



Sacramento

- **Vice-President of Workforce Services (June 2011 to February 2013).** During her time in this role, Lisa authored the winning statewide proposal to provide TANF employment and case management services for the State of New Mexico. The initial contract award was for \$8.9M; Lisa was successful in expanding the contracted services to over \$20M annually within three years.
- **Director of Workforce Services (May 2009 to May 2011).** Lisa was responsible for the oversight of workforce services providing employment services for individuals with developmental disabilities and other vulnerable adults. She oversaw eight county-funded contracts and programs throughout Washington State providing competitive community employment opportunities for individuals with developmental disabilities.

Arbor Education and Training, LLC (April 2003 to April 2009). As the Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, evaluation and improvement for TANF funded services through the Idaho State Division of Welfare for two separate regions.

Idaho Division of Welfare (September 1991 to March 2003). During her 13-year tenure with the State of Idaho, Lisa held various positions including determining eligibility for SNAP, Medicaid, TANF, Child Care, Aid to the Aged, Blind and Disabled (AABD). The following highlight positions held during her tenure:

- Interim Regional Program Manager
- Self-Reliance Supervisor
- Self-Reliance Trainer
- Eligibility Examiner

**Hilary Foster Moles, BSN**

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

Overview

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

Relevant Experience

BerryDunn (04/2019 to present). Hilary serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia BMS on project management initiatives.

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



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

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

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

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



Patricia Arrechea, MA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since January 2022)
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Associate of Arts in Liberal Arts, University of Hartford Bachelor of Arts in Psychology, Bay Path College Master of Arts in Human Services, Post University

Overview

Patricia is an experienced analyst and manager with a history of working in state departments on Medicaid eligibility, insurance claims, and processing reports. She has demonstrated skills in project management, administrative support, and inter-agency communications. She is familiar with Medicaid, Medicare, SNAP, CASH, and TANF in various contexts.

Experience

BerryDunn (01/2022 to present). Patricia serves on the testing team for the West Virginia PATH project.

Connecticut Department of Social Services (February 2012 to December 2021).

- **Business Analyst (2015 to present)**
Patricia works as a Business Analyst with experience in federally funded government programs such as Medicare, Medicaid, TANF, SNAP and data analysis. She is responsible for developing, creating, and testing new builds associated with the program. She uses JAMA and JIRA software daily, shares objectives for project completion, and participates in the team that went to several regional offices to assist eligibility workers and their supervisors when IMPACT went live throughout the state, which required troubleshooting and resolving routine problems regarding SNAP, Medicaid or Cash programs as well any system issues. She differentiates errors that created by the employee or the system in order to grant eligibility for qualified clients. Patricia also assists in testing the JAWS software, collaborates with IT staff concerning technical programming requirements, and participates in data clean-up and conversion activities. She promoted understanding of relevant issues; tests, and troubleshoot data produced from reports ensuring integrity of data and results.
- **Eligibility Services Worker (February 2012 to 2015)**
Patricia was assigned to the Intake Unit and Long-Term Care Unit. Her duties included processing new applications and redeterminations for all clients, reviewing material submitted by clients in order to determine whether they qualify for assistance or if more



information is needed, and sending correspondence. Her applications included SNAP, MEDICAL, including Medicaid, and CASH. She conducted SNAP interviews with clients in the intake office and assisted clients in obtaining medical benefits for Access Health CT.

Connecticut Department of Labor (December 2010 to February 2012). Patricia worked as a Community Services Representative to answer the unemployment line and handle all calls coming into the call center in English and Spanish. She determined whether a claimant needed a hearing in order to qualify for benefits and verified if a claimant could collect from state funds or federal funds. She released any payments being held and discontinued benefits and filed a report if fraud was confirmed.

Connecticut Department of Education (January 2003 to December 2010). Patricia worked as an Office Assistant in Fiscal Services to enter requisitions for purchase orders into CORE-CT, match invoices to receiving reports for shipments, and create on-line receiving reports on CORE-CT. She processed requests from CT Technical High School System (CTHSS) for student and faculty insurance, processed insurance requests with Insurance board, and maintained the database for justification and verification of insurance functions. Patricia also acted as agency liaison between business managers at CTHSS and Department of Insurance. Additionally, she processed travel reimbursement forms, managed agency correspondence, and verified that all payments issued adhered to union regulations.



Dezaree Moore, MS, PACCT

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since December 2021)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Science in Psychology, Central Connecticut University Master of Science in Criminal Justice, Kaplan University Certified Project for Addictions Cultural Competency Trainings (PACCT)

Overview

Dezaree is a Senior Business Analyst with progressive experience in integrated eligibility system of experience in federally funded government programs such as Medicare, Medicaid, TANF and SNAP and analysis. She has more than 7 years of experience developing and testing user acceptance scenarios/stories as well as in project management across the project lifecycle from requirement gathering design sessions into testing implementation and maintenance. She is proficient in JIRA and JAMA project management software. She has developed strong research skills and the ability to work independently as well as in cross functional teams with tight deadlines. In addition, she has often served as a Subject Matter Expert in Social Services programs.

Experience

BerryDunn (12/2021 to present). Dezaree serves on the technical team for the West Virginia PATH project.

State of Connecticut Department of Social Services (October 2017 to December 2021). Dezaree worked as a Social Services Business Analyst to provide customer support to users within assigned benefit module(s), troubleshoot and resolve routine problems and system issues, and assist in diagnosis and resolution of common eligibility processing issues. She assisted business process mapping and business requirement gathering and collaborated with IT staff concerning technical programming requirements. She implemented system upgrades and modifications, loaded data into test environment, and conveyed technical information to agency user. She also promoted understanding of relevant issues and wrote reports specific to assigned module(s) utilizing ERP system. She trained on the ERP system and assigned module(s), participated in module team meetings, and assisted with functional procedures and documentation in support of benefit modules. Over 10 years' experience working with Medicaid programs. Subject matter expert in Social Services Public Policy and Programs Specialist (Medicare, Medicaid, Health Exchange & Medical ACA, SNAP and CASH).

State of Connecticut Department of Social Services (March 2014 to October 2017). Dezaree



served as a User Acceptance Tester (UAT) Tester to develop, write, and execute test scenarios, scripts and other UAT documentation and the identification and extraction of custom data for use in testing. She enacted UAT test scripts against previously defined and signed-off business requirements or user stories. She reported test results, communicated all information to relevant parties to allow informed decisions to be made, and highlighted key issues and problems relating to the product sign-off once the testing phase was complete. Dezaree validated existing 'to be' processes as part of the UAT execution, including the revision and updating of business processes according to business requirements.

State of Connecticut Department of Social Services (September 2010 to March 2014). Dezaree served as an Eligibility Services Worker to interview individuals, determine and grant services and public assistance programs (Medicaid, SNAP, TANF and CASH), and research, verify, and evaluate statements given by clients and other factors to ensure compliance with program eligibility requirement. She entered and modified all relevant case eligibility information in the Eligibility Management System database and provided periodic cycle of eligibility redetermination services to ensure correct client benefits level. Dezaree assisted clients with application and receipt of various federal, state and municipal social services benefits, acted as liaison with local, state and federal agencies regarding determination and coordination of client eligibility and awards, and provided information regarding state public assistance programs to clients, social service agencies, attorneys and the public. She additionally prepared detailed summaries and acts as agency representative in Fair Hearings process.



Roshani Raghani

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since February 2022)
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Science in Microbiology, Mumbai University Scrum Fundamentals Certified Lean Six Sigma Champion Certification Certified Medical Transcriptionist, American Association of Medical Transcriptionists

Overview

Roshani is an experienced Business Analyst with more than seven years work with Business Process Flow, Software Development Life Cycle (SDLC), and gathering, analyzing and managing requirements. She has experience in business reengineering, business and functional analysis, systems analysis and design, quality assurance, gap analysis. She has demonstrated skills in cross-team communication, user acceptance testing, and project management.

Experience

BerryDunn (02/2022 to present). Roshani works on the WV PATH project as the Certification and Compliance Team member, managing the development of review materials for Federal partners to secure FFP.

NTT Data (August 2021 to February 2022). As a Senior Agile Business Analyst working with Guardian Life Insurance, Roshani works on Agile Projects creating Epics and features. She collaborates closely with the assigned project managers, scrum masters, and client to define the scope of a project. She performs testing and validation for the projects, uses knowledge of Jira® and Jira® Align for backlog management, and identifies risks, issues, assumptions, and dependencies to support solution delivery. Roshani performs duties of Lead Business Analyst/Product Owner for high visibility and high priority projects and uses best practice business and technical analysis principles such as process analysis and definition in using structured approaches.

KPMG (July 2019 to July 2021). Roshani worked as a Senior Business Analyst for the Pennsylvania Department of Human Services MMIS 2020 project to create high-level process flows to use as a starting point for upcoming requirements validation workshops. She facilitated discussions to gain consensus on requirements before the module contractors joined the project, included workshop outcomes in module RFPs, and confirmed that each PA Medicaid process flow aligned with the CMS MECT critical success factors. She authored artifacts including requirements specification documents, application tutorials, process flow diagrams, and meeting agendas/minutes. Roshani forecasted project budgeting and depicted return on investment (ROI) using advanced Excel and Visual Basic modeling.



Momentum Consulting (September 2016 to July 2019). Roshani served as a Senior Business Analyst with Pennsylvania DOT projects to facilitate and participate in requirements elaboration sessions between customers, business representatives, SMEs, and development teams. She authored artifacts, conducted observation sessions with designated business unit staff to document the current business processes, business user roles, business systems, business data information (entities and attributes), and business rules and documents the current enhancement requests related to the current Enterprise Content Management systems, and managed development teams as the scrum master using Agile methodology for successful execution of the SDLC. Roshani also created Test Management plans, Test scripts, and Test Cases, and performed System Testing and User Acceptance Testing. Roshani facilitated training for Business to perform User Acceptance Testing. She forecasted project budgeting and depicted ROI using advanced Excel and Visual Basic modeling.

Computer Aid, Inc. (May 2016 to September 2016). Roshani worked as a Business Analyst with a concrete understanding of business requirements gathering, business process flow, business process modelling and analysis, and design documentation. She facilitated and analyzed JAD sessions among the user community, stakeholders, and technical management. Roshani created project plans and schedules, conducted gap analysis, Strengths, Weaknesses, Opportunities, and Threats analysis, cost benefit analysis, and ROI analysis, and performed data analysis, impact analysis, and risk analysis and creates test cases for UAT. She interacted with the development team to provide environments that were ready for test users and end users, as well as facilitated test plan/test case walk-throughs to obtain feedback and approval sign-offs. Additionally, she worked on Unified Modelling Language, Object Oriented Analysis and Design, Rational Unified Process, Agile Project Management, and Scrum.

Holy Spirit Hospital (October 2012 to April 2015). As a Business Analyst, Roshani provided functional subject matter expertise to all client requirements for designs, and implemented and reviewed new processes and technologies to systems. She was responsible for researching Medicaid guidelines to make sure Holy Spirit was meeting Medicaid's standards, coordinating with communication team members and clients to design all required learning materials, and preparing presentations and databases to provide workforce support. She interacted with clients to develop consulting and project management skills, address data requests, and assist in data management. She converted business requirements into test scenarios through in-depth analysis, enhanced manual and automation testing skills, and refined her expertise in creating and maintaining requirements documentation.

Health Prime International (August 2010 to April 2011). Roshani worked as an Electronic Medical Record Analyst to transcribe and record operative reports, discharge summaries, patient history and examinations, physician letters and notes, and pharmacy, rehabilitation, autopsy, and x-ray reports. She oversaw daily department activities to optimize productivity and quality of work, and responded to inquiries for the release of medical information, ensuring that legal requirements were followed and proper consent was obtained, as well as helped to ensure strict confidentiality of financial records. She created business requirements and functional requirement specifications documents and served as a liaison between clients and technical staff to resolve conflicts and worked to bridge the gaps between IT and business clients.





Reanna Jones

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since January 2022)
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Science in Healthcare Management, Florida A&M University

Overview

Reanna is an experienced leader with more than 6 years' consulting experience in Medicaid, Medicare, and third-party liability health care billing. She is skilled in project management, data analysis, agile and waterfall software development life cycle (SDLC) processes, requirement traceability matrices (RTM), business requirement documents (BRD), electronic data interchange (EDI), and customer service.

Experience

BerryDunn (01/2022 to present).

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (01/2022 to present).**
Reanna is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. She reviews and provides input into assigned project deliverables, assists with project activities associated with requirements, and leads the review and validation activities for the Document Inventory (forms, letters, notice) of all legacy systems.

Gainwell Technologies (01/2015 to 01/2022). Reanna worked as a Senior Business Analyst to provide creative solutions to user requirements, solve client problems, and work with the Agency for Health Care Administration (AHCA) by participating in business requirements sessions and timelines. She assisted Medicaid policies with special tasks and provided follow up reporting for the Center for Medicare and Medicaid Services that included the percentage of dual eligible recipients, the number of Medicare claims received and processed during a certain period, the number of claims that paid and denied, and the ratio of claims received and paid. She served as the department's lead analyst when working with different Medicaid vendors on various projects and advised Medicaid providers on locating information for further assistance depending on inquiry. Reanna also reviewed business related documents such as business analyst test case outcomes, collected research, and developed provider outreach and training material for quality and accuracy. She communicated with third party vendors to collaborate on changes within interchange, worked with vendors such as EVV, CMS, HMS, 3M, Navigant Consulting Firm, Magellan, and Molina Health, and assisted the system architects with designing the layout and functionality of user interfaces both internal and external for new changes to the system. Reanna created RTMs, BRDs, test strategies and test plans to be used by junior business



analysts to complete work assignments, as well as assisting with installing new systems by performing functional, regression, stress, and post implementation testing. She facilitated client meetings to discuss project status, changes, and impact. She assisted the project manager with constructing project plans, metrics, and timelines for Junior level business analyst projects and work assignments. She provided group and one on one Medicaid policy training sessions to new hires and peers within the department and collaborated with data scientist by providing Medicaid claim variables to be used for monthly operational data analysis reports created through Tableau.

Hewlett-Packard (07/2013 to 12/2014). Reanna worked as a Healthcare Insurance representative and Business Analyst Trainee to assist Florida Medicaid providers with claim processing and payments inquiries, advise providers on seeking information for further assistance, and report system issues to management immediately and effectively so that they could be escalated and resolved in a timely matter. She provided customer service and assisted in recording and reporting escalated call center issues to supervisor to aid in providing provider outreach alerts and bulletins for identified system issue. Reanna was the healthcare policy and regulation subject matter expert for department and so provided the relevant training to peers. She assisted supervisor with special projects within the department when call centers such as the EDI and provider enrollment departments needed additional agents.

**Katie Weidner**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since December 2021)
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Bachelor of Arts in Psychology, Hastings University

Overview

Katie is a highly skilled, analytical leader with over 16 years of experience in a variety of state government positions, including most recently, working to innovate and transform compliance-based service systems to outcome-based, person-centered systems based on self-determination, dignity and choice. She is highly knowledgeable in Medicaid 1915 (c) and Child Welfare performance metrics, data collection design and quality/outcome-based service systems. She has served as a subject matter expert in state regulations, CMS Final Settings Rule, Structured Decision Making (SDM) safety model, and Child Welfare with an understanding of federal regulations and service systems.

Experience**BerryDunn (12/2021 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (01/2022 to present).**
As a consultant, Katie serves as the OCM team on the West Virginia People's Access to Help (WV PATH) project. She manages the identification, development, and implementation of organizational change management and operational readiness activities.

State of Nebraska Department of Health and Human Services (DHHS), Division of Developmental Disabilities (September 2005 to November 2021)

- **Quality Administrator (February 2021 to November 2021)**
Katie planned, organized, and directed the work of the quality and compliance/reporting teams (18 total staff), including ensuring all assessments, compliance checks, and required Federal (372 reports and Evidence Reports) and State reports (legislative reports, etc.) were completed timely, accurately, and are of acceptable quality. She guided supervisors in decision-making and performance improvement, assuring that challenges affecting the overall health of the program and division are conveyed to appropriate persons in a timely manner, and a wide array of duties as assigned by the Division Director and Deputy Directors. She assisted in the writing and implementation of the Division's Medicaid 1915(c) waivers, particularly as it related to sub-assurance performance measures and the Quality Improvement Strategies. She ensured that necessary data for sub-assurance performance measures was made available, was accurate, and met the scope of each measure. She made changes to improve data collection throughout the life of the waivers. Katie also led and directed the work of the Alternative Compliance



Committee, oversaw the Quality Improvement Strategy for the four Medicaid Home and Community-Based Services 1915(c) Walvers, and managed a major contract that required working with the contractor to develop and implement strategies.

- ***Provider Relations Program Manager (January 2017 to February 2021)***
Katie worked as the administrator of the Performance team for the Developmental Disabilities Home-and-Community-based Services. She managed resources necessary to operate and maintain assigned program function(s) including employee time resources, developed and/or revised the assigned program and project operating policies, procedures and objectives within agency and regulatory guidelines, and coordinated program services with other State agencies including the Division of Public Health, the Division of Medicaid and Long-Term Care, and the Division of Children and Family Services, as well as external provider service agencies, individual providers, individuals receiving services, and stakeholders.
- ***Adult Protective Services/Child Protective Services Program Specialist (February 2015 to January 2017)***
Katie provided case consultation to Children and Family Services (CFS) Staff on Adult Protective Services, SDM, transition aged youth concerns, and ongoing Child Protective Services policy and procedure. She collaborated with DHHS legal in the review and interpretation of federal laws, state statutes, and regulations in order to develop program policy and procedures. She analyzed and prepared data to write federal and state reports, performed quality assurance analysis, and developed program improvement plans and processes. Katie researched established best practices and made recommendations for quality program service delivery. She developed work plans and collaborated with internal and external customers in implementing new and enhanced practices, and provided technical assistance and training regarding the program rules, regulations. She created and conducted training sessions to internal staff regarding new policies and statutes, as well as outreach sessions to external customers including private organizations, attorneys, and the general public on the various aspects of Adult Protective Services, Mandatory Reporting, and prevention activities. She drafted new or updated APS and CPS Policy and Procedure memorandums and conducts all necessary research regarding best practice, lawfulness, adherence to regulations, and other change-related aspects related to the policy.
- ***Program Accuracy Specialist (January 2013 to February 2015)***
Katie reviewed assigned Quality Assurance tools and provided feedback to the Children and Family Services staff. She utilized extensive knowledge in her initial assessment and ongoing case management policy and practice as well as her knowledge of alternative response, intake, and inter-rater reliability practices. She contributed to the Continuous Quality Improvement (CQI) process including serving on and attending CQI sub-groups. She monitored trends to track and identify solutions for divergences, reviewed and analyzed data reports and case management files, and performed monthly and quarterly reviews. She assisted in the development of quality assurance tools that were applied in day-to-day case management review to ensure compliance with federal outcomes.



- **Other positions Katie held were**
 - *Child and Family Services Specialist (March 2009 to January 2013)*
 - *Children and Families Outcomes Monitor (January 2011 to March 2012)*
 - *Human Services Treatment Specialist (September 2005 to February 2009)*



Payton Waybright

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since August 2020)
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor's, Dietetics and Nutrition, Minor in Psychology, Marshall University

Overview

Payton brings several years of clinical experience and medical knowledge. She is experienced in office settings and organization.

Relevant Experience

BerryDunn (08/2020 to present).

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (08/2020 to present).**
Payton 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).

Mildred Mitchell Bateman Hospital (05/2016 to 08/2020). Payton aides mentally/emotionally impaired clients, assisting in daily living activities. She files paperwork for the unit for inpatients, outpatients, and new hires, serves as team lead for new employees and sanitation, and is responsible for medical terminology and management.

Holzer Senior Care (06/2015 to 05/2016). Payton was responsible for unit charting on patients. She performed CNA duties and served as a Team Patient Activity leader.

Huntington Health and Rehabilitation Center (05/2014 to 02/2015). Payton performed CNA duties, aiding patients with daily needs. She was responsible for unit charts on patients and patient activities.

Pleasant Valley Nursing Home (05/2011 to 03/2014). Payton served CNA duties and assisted with charting patients.



Morgan Krieger

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed 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.

Relevant 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 September 2021). 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.

**Caitlin Poling**

Proposed Project Role:	Project Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since June 2021)
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Associate Degree in Arts, English focus, West Virginia University JCAHPO Ophthalmic Assistant Certification

Overview

Caitlin brings an extensive knowledge of insurance billing, including Medicare, Medicaid, and commercial plans, coding, prior authorizations, step therapies, and claims submission requirements to BerryDunn. She has over 6 years' experience documenting and managing detailed HIPAA-compliant information within insurance and clinical practice settings. Her ability to remain focused, organized, and adaptable, even in complex and high-pressure situations are excellent qualities that complement the project coordination team.

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

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (06/2021 to present).**

Caitlin 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).

Mountain State Eye Associates (April 2017 to June 2021). Caitlin works as a certified associate to directly assist MDs and ODs in a busy ophthalmic practice whose providers diagnose and treat ocular diseases. Caitlin performs extensive, thorough patient histories and works directly with Medicare, Medicaid, and commercial plans to ensure patient coverage for medications and procedures and assists in providing cost-reducing programs to patients. Her role requires thorough documentation and note taking for measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure and administering ophthalmic medications to patients. Caitlin arranges pertinent diagnostic and medical procedures for patients, provides prescriptions for patients through various methods, and assists with scheduling and patient flow management. She ensures all patients have updated, accurate HIPAA compliant registration forms on file and that all EMR systems reflect correct patient information.

PacificSource Health Plans (September 2015 to November 2015). Caitlin worked as a provider support technician to assist provider support representatives in accurately entering and maintaining all



provider data in the PacificSource database. She investigated issues by obtaining and coordinating information from other PacificSource departments or external sources. She maintained provider updates received from returned provider mail, provider OnBase queues, and Provider Network Support e-mail queue daily. Caitlin recorded, maintained, and changed provider tax identification records and coordinated efforts with the finance department for annual 1099 filings.

Wal-Mart Supercenter (August 2014 to September 2015). Caitlin worked as an associate to provide remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries and followed proper procedures for handling claims. Using a thorough knowledge of the store and its departments, Caitlin ensured all merchandise was properly labeled, priced, and replenished as necessary. She also traveled to assist in new store and existing store remodeling efforts.

Highmark WV BCBS (October 2012 to July 2014). Caitlin worked as a member services representative in the senior markets to perform excellent customer care for MAPDs and PDPs in accordance with HIPAA regulations. She managed high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and providers. She processed premium payment transactions and worked with providers and claims processors to ensure claims were processed according to member benefits for direct pay and dedicated employer group members. Caitlin helped identify issues with benefit tools/resources and handled/transferred members in need of assistance outside of the practice area or to file complaints. She also handled general correspondence and internet inquiries in a timely, efficient manner.

**Samuel Kessler**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since September 2020)
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	BS, Marketing, West Virginia Wesleyan College

Overview

Samuel is an experienced customer service professional, bringing seven years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

Relevant Experience**BerryDunn (08/2020 to present).**

- **West Virginia Department of Health and Human Resources - People's Access to Help (PATH) (08/2020); Children with Serious Emotional Disorder (CSED) project (08/2020 to present)**

Samuel is a project coordinator for both projects. He 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). In addition, as part of the CSED project, Samuel tracks decision, interfaces with vendors, assists with the drafting of reports, and supports the project team in a variety of functions.

N3 LLC (05/2018 to 8/2020). Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. Currently he drives Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

Target (06/2017 to 01/2018). As an electronics sales floor associate, Samuel helped guests with education on devices and products, answering questions, and making sure that each guest's needs were taken care of.



Trojan Landing LLC (05/2013 to 08/2016). As a marine salesperson for Trojan Landing LLC, Samuel assisted customers with their personal recreational vehicle needs, making sure to match each customer with the right product for them. He took them through purchase, title, and financing, and assisted with maintenance and storage needs afterwards. As marketing director, he handled all online sales, digital and print marketing, and event planning and marketing.



Stacie Mayhorn

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed with BerryDunn since January 2022)
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in Early Childhood Education, Fairmont State University

Overview

Stacie is an experience coordinator with a history of working with early childhood education. She has developed strong communication, assessment, and management skills while working in the West Virginia Birth to Three Early Intervention Program and has further developed her leadership and coaching skills in her additional jobs.

Relevant Experience

BerryDunn (01/2022 to present).

- **West Virginia Department of Health and Human Resources - People's Access to Help (PATH) (01/2022 to present)**

Stacie 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).

West Virginia Birth to Three Early Intervention Program (August 2008 to November 2021). Stacie worked as a Developmental Specialist in Coordination to manage all coordination, scheduling, and processing. She evaluated infants to toddlers in all areas of development, such as sensory, cognition, language, motor, social emotional and adaptive skills. She developed and implemented family goals and strategies for children with developmental delays. Stacie also conducted performance assessments, evaluations, and solved problems that arose.

Charleston Catholic (August 2014 to present). Stacie works as a Coach to schedule, coordinate, and facilitate cheerleading team activities. She works with students and staff across various events and for school needs. She also communicates with staff and parents on schedules and events.

Ages and Stages Childcare and Learning Center (August 2008 to August 2010). Stacie worked as Owner and Director to supervise staff and teachers, maintain and create documentation, and run all coordination, scheduling, planning, and communication. She designed age-appropriate programs plans and daily activities. Additionally, she prepared budgets, regulated spending, and implemented state rules and regulations.





Molly Hawkinson

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

Relevant Experience

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

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

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

**Bethany Pike**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Editor (employed 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.



Caitlin Cabral

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

Overview

Caitlin is part of the 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.

Relevant Experience

BerryDunn (09/2021 to present). Caitlin is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes.

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.

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.

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.



Carole Ann Guay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed 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 (10/2014 to present). Carole Ann serves as a project coordinator for BerryDunn's government consulting group, with additional administrative duties. Selected project work includes:

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



- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**

BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

- **Minnesota Health Benefit Exchange (MNsure) – Programmatic Audit (10/2015 to present).**

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

- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**

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

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**

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

- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**

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

- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**

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

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



and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.

**Emily Hendrickson**

Proposed Project Role:	Project Management Support Services
Role at BerryDunn:	Paraprofessional (employed with BerryDunn since July 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



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while inspiring students to succeed in learning; proficiency in schedule management. She also acted as Class Advisor to senior class, which involved organized fund- raising events and the senior trip.



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

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

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



Janine DiLorenzo

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

Overview

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

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 cross sector, 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.



Jonathan Williams

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

Overview

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

Relevant Experience

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

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

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

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

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



Jordan Ramsey

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor (employed with BerryDunn since July 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.



Karla Fossett, MFA, Prosci® CCP

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

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

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



Kyle Melton

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

Overview

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

Relevant Experience

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

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

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

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

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



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



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

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

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

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

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

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



Appendix C: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
D01	Commissioner Briefing	On a monthly basis, the State PMO will develop and deliver a status report to the WV DHHR BMS Leadership. The project status report will include a status of project deliverables and timeline, as well as associated project issues and risks.
D02	Readiness Assessment	The project readiness assessment will qualify the project's readiness for specific milestones, deployments, and other events. On an as needed basis, readiness assessments will be delivered to DHHR stakeholders and reviewed with the State upon request.
D03	Monthly Status Reports	On a monthly basis, the State PMO will develop and deliver a status report to the DHHR Executive Steering Committee. The project status report will include a status of project deliverables and timeline, as well as associated project issues and risks.
D04	Updated UAT Plan	The updated UAT Plan will document the State's approach to UAT of the WVIES. The Plan will be developed collaboratively between the State, State PMO, and Vendor and will include the approach to tracking UAT outcomes, issues, and defects.
D05	IAPD Updates	The IAPD will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610. An implementation project management approach will also be submitted with this deliverable.
D06	Updated Change Management Plan	<p>The Updated Change Management Plan will include updates to the following at a minimum:</p> <ul style="list-style-type: none">• Responsibilities for OCM stakeholders• Known OCM risks, issues, and/or assumptions• Approach to OCM communications and trainings• Recommended timeline for implementation of proposed approach to communications and training <p>BerryDunn anticipates that the Change Management Plan will be updated as needed over the course of the project.</p>
D07	Project Closeout Summary	The Project Closeout Summary will include an inventory of project documentation and deliverables. The Summary will also document the disposition or reassignment of action



Deliverable #	Deliverable Name	Deliverable Description
		Items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix D: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/ Abbreviation	Definition
ACA	Affordable Care Act
ACF	Administration for Children and Families
BCSE	Bureau for Child Support Enforcement
BFA	Bureau for Family Assistance
BMS	Bureau for Medicaid Services
BSS	Bureau of Social Services
CFR	Code of Federal Regulations
CLs	Commodity Lines
CMS	Centers for Medicare and Medicaid Services
DAF	Deliverable Acceptance Form
DDI	Design Development and Implementation
DHHR	Department of Health and Human Resources
E&E	Eligibility and Enrollment
EPMO	Enterprise Project Management Office
FACTS	Families and Children Tracking System
FAST	Families Accessing Services through Technologies
FFP	Federal Financial Participation
FNS	Food and Nutrition Services
HHS	Health and Human Services
IAPD	Implementation Advanced Planning Document
IES	Integrated Eligibility Solution
IV&V	Independent Verification and Validation
MESC	Medicaid Enterprise Systems
MIS	Office of Management and Information System
OCM	Organizational Change Management



Acronym/ Abbreviation	Definition
OMB	Office of Management and Medicaid Services
ORT	Operational Readiness Testing
OSCAR	Online Support Collections and Reporting
PATH	People's Access to Help
POS	Point of Sale
QA	Quality Assurance
RACI	Responsible, Accountable, Consulted, and Informed
RAPIDS	Recipient Automated Payment and Information Data System
RFP	Request for Proposal
RTM	Requirements Traceability Matrix
SACWIS	State Automated Child Welfare Information Systems
SIT	System Integration Testing
SNAP	Supplemental Nutrition Assistance Program
SSA	Social Security Administration
SOW	Statement of Work
TANF	Temporary Assistance to Needy Families
UAT	User Acceptance Testing
WV CHIP	West Virginia Children's Health Insurance Program
WVOT	West Virginia Office of Technology