



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

# State of West Virginia Delivery Order

Order Date: 09-02-2022

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

Order Number:	CDO 0511 2680 BMS2300000011 1	Procurement Folder:	1096926
Document Name:	Certified Community Behavioral Health Clinic State Plan(SPA)	Reason for Modification:	
Document Description:	Certified Community Behavioral Health Clinic State Plan(SPA)		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST  PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: James W Atkins Requestor Phone: (304) 352-4319 Requestor Email: james.w.atkins@wv.gov  <b>23 48286</b> FILE LOCATION
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Purchasing Division's File Copy

Total Order Amount: \$448,150.00

CH 9/26/22  
PURCHASING DIVISION AUTHORIZATION  
DATE: 9/26/2022  
ELECTRONIC SIGNATURE ON FILE

SCANNED

ENTERED

ENCUMBRANCE CERTIFICATION  
DATE: 9-27-2022  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Certified Community Behavioral Health Clinic State Plan Amendment (SPA) Project

Dates of Service 09/19/2022 - 08/31/2023

Total: \$448,150.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$7,955.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-09-19	2023-08-31				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 37 Hours @ \$215 = \$7,955.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$9,990.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-09-19	2023-08-31				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 37 hours @ \$270 = \$9,990.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$361,725.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-09-19	2023-08-31				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Ethan Wiley 127 hours @ \$175 = \$22,225  
 Susan Chugha 372 hours @ \$175 = \$65,100  
 Tonya Roloson 577 hours @ \$175 = \$100,975  
 Kitty Purington 363 hours @ \$175 = \$63,525  
 Brody McClellan 365 hours @ \$175 = \$63,875  
 Dawn Webb 263 hours @ \$175 = \$46,025

Total 2,067 hours @ \$175 = \$361,725

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$68,480.00
Service From		Service To	Manufacturer	Model No	Delivery Date
2022-09-19		2023-08-31			

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

**Extended Description:**

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Kirsten Siebenga 576 hours @ \$80 = \$46,080  
Jordan Ramsey 35 hours @ \$80 = \$2,800  
Karla Fossett 35 hours @ \$80 = \$2,800  
Carol Ann Guay 35 hours @ \$80 = \$2,800  
Caitlin Cabral 35 hours @ \$80 = \$2,800  
Emily Hendrickson 35 hours @ \$80 = \$2,800  
Janine DiLorenzo 35 hours @ \$80 = \$2,800  
Molly Hawkinson 35 hours @ \$80 = \$2,800  
Jon Williams 35 hours @ \$80 = \$2,800

Total: 856 hours @ \$80 = \$68,480



August 23, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the West Virginia Certified Community Behavioral Health Clinic State Plan Amendment (SPA) Project under our contract (CMA # HHR21\*03). As stated in the SOW document, the duration of this work is estimated to be 12 months. BerryDunn agrees to a SOW start date effective September 19, 2022.

Assuming a start date of September 19, 2022, the work would conclude on August 31, 2023. 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 provide these important services to the State of West Virginia.

Best Regards,

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

Nicole Becnel  
Principal  
681-313-8905



Staffing Plan and Scope of Work for the  
West Virginia Bureau for Medical Services  
Certified Community Behavioral Health Clinic (CCBHC) State Plan  
Amendment (SPA) Project  
Prepared for CMA #HHR21\*03



**Submitted by:**

Nicole Becnel, PMP®, Principal  
Susan Chugha, Project Lead  
Berry Dunn McNeil & Parker, LLC  
300 Capitol Street  
Charleston, WV 25301  
Phone: 207.541.2244  
[nbecnel@berrydunn.com](mailto:nbecnel@berrydunn.com)  
[schugha@berrydunn.com](mailto:schugha@berrydunn.com)

**Submitted on:**

August 23, 2022

**berrydunn.com**

**Staffing Plan and Scope of Work  
For the West Virginia (State) Bureau for Medical Services  
Certified Behavioral Health Clinic (CCBHC) State Plan Amendment (SPA) Project**

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health Human Resources (DHHR) and Bureau for Medical Services (BMS) with the CCBHC SPA Project.

## 1.0 Key Information

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the CCBHC SPA Project.

BMS has requested that BerryDunn assist with the development of a CCBHC SPA. Additionally, BerryDunn will assist with grant administration, facilitating policy discussions, interfacing with the rate setting vendor, coordinating requirements with other stakeholders, and assisting with implementation as requested. Lastly, BerryDunn will provide the following services: project oversight, project management, and oversee all activities related to the development of the CCBHC SPA.

The scope for the CCBHC SPA Project will include:

- Project management and subject matter expert (SME) support for the development of a CCBHC SPA; including assistance with the SPA public comment and notice process
- Coordination efforts with BMS, DHHR bureaus, as needed, vendors, and any other stakeholders to assist with the SPA development
- Assistance with program design, such as policy development, planning, and training, as needed

This project will aid the State to meet several identified Medicaid Information Technology Architecture (MITA) specific goals, such as:

- Gen 1.0 Goal: Improve effectiveness and efficiency
- Gen 2.0 Goal: Minimize risk and maximize value from contracted services and products
- Gen 4.0 Goal: Assess, implement, and monitor compliance with all relevant federal and state laws
- Gen 5.0 Goal: Ensure program quality
- CM 1.0 Goal: Improve healthcare outcomes for members
- OM 1.0 Goal: Improve operational efficiency and reduce costs in the healthcare system
- PL 1.0 Goal: Enhance the Bureau's ability to analyze the effectiveness of potential and existing benefits and policies

This work will begin upon approval of this SOW. BerryDunn will provide a separate letter acknowledging approval of the start date once the SOW approval date is known. This work is projected to be completed within 12 months of project initiation.

The BMS leadership team will consist of:

- Commissioner Cynthia Beane as the DHHR project sponsor
- Cynthia Parsons as BMS program director
- Keith King as BMS project and program manager

The BerryDunn leadership team will consist of:

- Nicole Becnel as the engagement manager
- Ed Daranyi as the lead project manager
- Ethan Wiley as the portfolio manager
- Susan Chugha as the program manager
- Tonya Roloson as the project manager

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA APD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on July 15, 2022, for total State and federal funds in the amount of \$100,538,318 under project identifier WV-2022-05-31-MMIS-MITA IAPDU. The estimated cost of the services to be delivered under this SOW is \$448,150 (included in the approved APD). Therefore, any additional scope that is added to the services to be provided under this SOW may require that the State update its MMIS IAPD to allocate additional funds for project management.

## 2.0 Assumptions

BerryDunn identified the following assumptions:

- Deliverables will be provided in an agreed-upon format.
- BerryDunn will honor the master contract Service Level Agreement (SLA) requirements.
- All project documents, including meeting outcomes, action items, issues, risks, and decisions will be on the Microsoft SharePoint project site, shared with, and communicated to the BMS project sponsor and project leads during the project's duration.
- The State project leads, with support from the BerryDunn project team, will aim to provide timely decision-making and responses to information requests from State and/or vendor stakeholders.
- BerryDunn recognizes that external factors, such as, but not limited to, stakeholder involvement may impact project timelines, and BerryDunn will work with the State project manager and State project lead to mitigate any such issues as they arise.

- Any funding opportunities or grants identified as subprojects under this SOW, if awarded will be executed under a separate SOW.
- The estimated project budget has been computed with a contingency allowance for possible one year no-cost extension.
- The estimated number of hours reflected in the SOW is based on the assumption that BerryDunn will initiate no more than one subproject as part of subproject management.

### 3.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting the work; and lists the estimated hours for completion of each key task. Section 6.0 provides a high-level timeline for the activities described below.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	*Hours Estimate
1.0	<p><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's project leadership will meet with the BMS project sponsor and other key team members on a regular basis to discuss project status and issues impacting timely completion of the work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>Deliverable 01: Commissioner Briefing</li> <li>Deliverable 02: Monthly Status Report</li> <li>Deliverable 03: Risks, issues, and decisions log.</li> </ul> <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of the D08: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	<p>Nicole Becnel</p> <p>Ed Daranyi</p> <p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Tonya Roloson</p>	1,435
2.0	<p><b>Project Initiation</b></p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will conduct a kickoff meeting with key stakeholders to review goals and objectives. Other tasks under project initiation include:</p> <ul style="list-style-type: none"> <li>Create a Project Timeline that includes pertinent tasks, activities, and milestones for the project.</li> <li>Facilitate meetings, prepare meeting materials, and capture meeting notes for</li> </ul>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Tonya Roloson</p> <p>Kitty Purington</p> <p>Kirsten Siebenga</p> <p>Jordan Ramsey</p> <p>Karla Fosset</p> <p>Carole Ann Guay</p> <p>Caitlin Cabral</p>	77

	<p>BerryDunn- and State-owned meetings.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>Deliverable 04: Project Timeline</li> </ul> <p><i>Completion Criteria</i></p> <p>Project Initiation will be deemed complete upon successful completion of the D04: Project Timeline.</p>	<p>Emily Hendrickson Jon Williams Janine DiLorenzo Molly Hawkinson</p>	
3.0	<p><b>CCBHC State Plan Amendment (SPA)</b></p> <p><b>Development Activities</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following activities related to the development of the CCBHC SPA:</p> <ul style="list-style-type: none"> <li>Complete SPA draft: including any necessary edits as requested by BMS</li> <li>Collaborate with other stakeholders to support the development of the SPA</li> <li>Facilitate workgroups with stakeholders</li> <li>Identify data and documentation needs</li> <li>Prepare documents needed to support Medical Services Fund Advisory Council (MSFAC) meeting(s)</li> <li>Support public notice period</li> <li>Revise SPA draft, as needed</li> <li>Draft SPA package materials</li> <li>Support BMS during the approval process</li> <li>Review and assist with CMS' Request for Additional Information responses</li> <li>Research federal guidelines and industry best practices</li> <li>Research Substance Abuse and Mental Health Services Administration (SAMHSA) CCBHC criteria</li> <li>Assist with grant administration, as needed</li> <li>Provide research, SME, and benefit design for future policy development and provider/staff training, as needed</li> <li>Assist with project coordination and any potential subprojects in scheduling meetings, as needed, with stakeholders to obtain</li> </ul>	<p>Ethan Wiley Susan Chugha Tonya Roloson Kitty Purington Brody McClellan Dawn Webb Jordan Ramsey Karla Fosset Carole Ann Guay Caitlin Cabral Emily Hendrickson Jon Williams Molly Hawkinson Janine DiLorenzo</p>	1,415

	<p>updates on outstanding tasks, identify new tasks, and discuss roadblocks, as needed</p> <ul style="list-style-type: none"> <li>Create and manage project trackers (action items, decisions, issues, and risk tracking)</li> </ul> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>Deliverable 05: Completed SPA</li> <li>Deliverable 06: SPA Public Notice Materials, as needed</li> </ul> <p><i>Completion Criteria</i></p> <p>The CMS Deliverables, Data Measures, and Ongoing Project Coordination/Support phase will be deemed complete upon successful completion of the D05: Completed SPA and D06: SPA Public Notice Materials, as needed.</p>		
4.0	<p><b>Project Closeout</b></p> <p><i>Capstone Deliverable</i></p> <p>BerryDunn will prepare a Project Closeout Summary, which will include an inventory of all project documentation, deliverables, and work hours.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>Deliverable 07: Project Closeout Summary</li> </ul> <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the State project sponsor or his/her designee formally accepts and signs Deliverable 07: Project Closeout Summary.</p>	<p>Susan Chugha Tonya Roloson Kirsten Siebenga Jordan Ramsey Karla Fosset Carole Ann Guay Caitlin Cabral Emily Hendrickson Jon Williams Molly Hawkinson Janine DiLorenzo</p>	70
Total Hours			2,997
Total Not-To-Exceed Cost Estimate			\$448,150

## 4.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 2 in CMA #HHR21\*03.

**Table 2: Project Resources**

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Year 2					
7	LPM	\$215	Ed Daranyi	37	\$7,955
8	EM	\$270	Nicole Becnel	37	\$9,990
10	GPM	\$175	Ethan Wiley	127	\$22,225
10	GPM	\$175	Susan Chugha	372	\$65,100
10	GPM	\$175	Tonya Roloson	577	\$100,975
10	GPM	\$175	Kitty Purington	363	\$63,525
10	GPM	\$175	Brody McClellan	365	\$63,875
10	GPM	\$175	Dawn Webb	263	\$46,025
11	SS	\$80	Kirsten Siebenga	576	\$46,080
11	SS	\$80	Jordan Ramsey	35	\$2,800
11	SS	\$80	Karla Fossett	35	\$2,800

11	SS	\$80	Carol Ann Guay	35	\$2,800
11	SS	\$80	Caitlin Cabral	35	\$2800
11	SS	\$80	Emily Hendrickson	35	\$2,800
11	SS	\$80	Janine DiLorenzo	35	\$2,800
11	SS	\$80	Molly Hawkinson	35	\$2,800
11	SS	\$80	Jon Williams	35	\$2,800
			Total Hours	<b>2,997</b>	<b>\$448,150</b>

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

## 5.0 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:

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

**Table 3: Project Hours and Costs per Month**

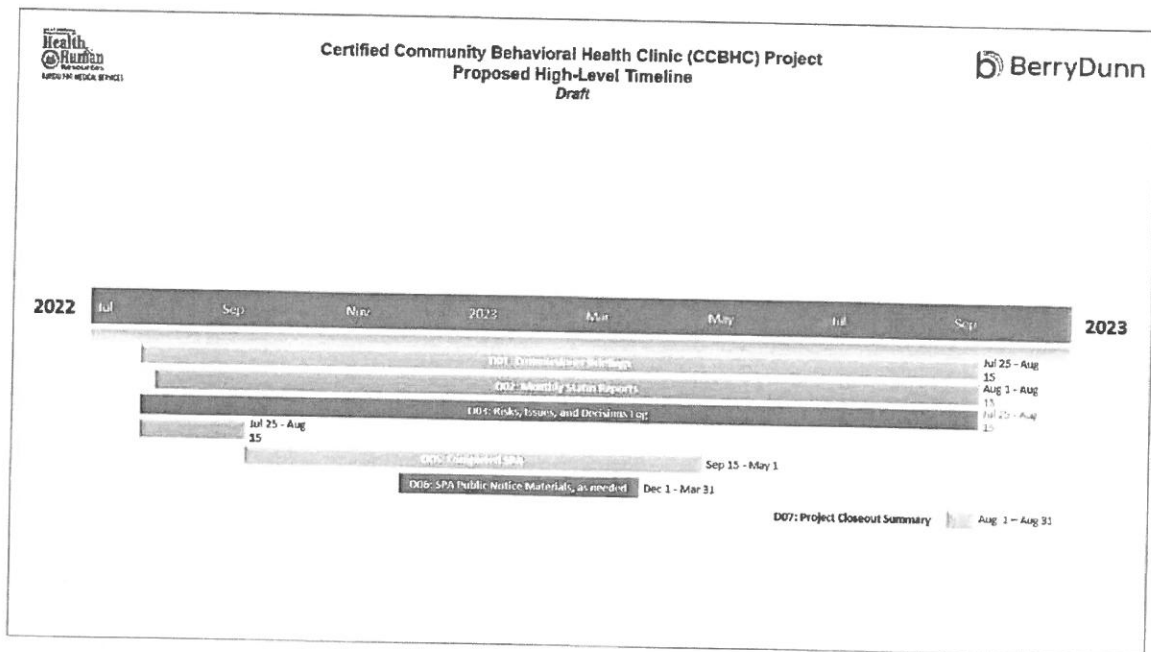
Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	4	4	175	72	255	\$38,325
Month 2	3	3	172	72	250	\$37,315
Month 3	3	3	172	72	250	\$37,315
Month 4	3	3	172	72	250	\$37,315
Month 5	3	3	172	71	249	\$37,235
Month 6	3	3	172	71	249	\$37,235
Month 7	3	3	172	71	249	\$37,235
Month 8	3	3	172	71	249	\$37,235
Month 9	3	3	172	71	249	\$37,235
Month 10	3	3	172	71	249	\$37,235

Month 11	3	3	172	71	249	\$37,235
Month 12	3	3	172	71	249	\$37,235
<b>Total</b>	<b>37</b>	<b>37</b>	<b>2,067</b>	<b>856</b>	<b>2,997</b>	<b>\$448,150.00</b>

## 6.0 High-Level Timeline

Figure 1, below, illustrates the proposed high-level timeline for planning activities.

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



*\*For the months July – August 2022 work has been ongoing and approved under the TAPS project.*

**BerryDunn Authorized Signature**

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

*Nicole G. Becnel*

Signature

August 23, 2022

Date

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

Cynthia Parsons,  
MA, Director

Digitally signed by: Cynthia Parsons, MA, Director  
DN: CN = Cynthia Parsons, MA, Director email =  
cynthia.a.parsons@wv.gov C = US O = WV  
DHHR OU = Medical Services  
Date: 2022.08.29 14:34:59 -05'00'

Signature

08/29/2022

Date

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## Appendix A: Resumes

## Eduardo Daranyi, MEd, PMP

<b>Proposed Project Role:</b>	Lead Project Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Science in Physics, Mathematics, and Business Administration, Hillsdale College Master of Education, Lesley College Certified Project Management Professional Systems Engineering Development Program, Electronic Data Systems

### Overview

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

### Experience

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

- **West Virginia Bureau for Medical Services (BMS) (2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; ACA analysis, and advisory services; ICD-10 compliance; E&E systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; CHIP implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives. Since Ed joined the West Virginia project on a full-time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.

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

*Ed is the Engagement Manager overseeing the State's transition of the WVCHIP*

- program from fee for service to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.*
- o *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to present). Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.*
  - o *People's Access to Help (PATH) DDI Project Management (10/2017 to present). Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.*
  - o *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.*

- o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present).*

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

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

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

- o *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)*

- o *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- o *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- o *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- o *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- o *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- o *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- o *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- o *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- o *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- o *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- o *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- o *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- o *PPACA Workgroup Oversight (2012 to 2015)*
- o *5010 Refresh Project (2012 to 2015)*
- o *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- o *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- o *MITA 3.0 Organizational Redesign (2013)*
- o *Policy Workflow Assessment (2013)*
- o *Prior Authorization Forms Revisions (2013)*
- o *ePrescribing Helpdesk and Support (2012)*
- **West Virginia Department of Health and Human Resources (DHHR) (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.
- **Maine Department of Health and Human Services (DHHS) – IV&V and QA Services (04/2011 to 06/2012).**  
BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues,

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

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

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

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

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

**Goold Health Systems (1999 to 2005).**

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

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

- **Maine DHHS (05/2001 to 01/2002).** While employed by GHS, Ed served as technical project coordinator for Maine's MMIS Pharmacy Preferred Drug List and Supplemental Rebate implementation. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

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

**Presentations**

*Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014

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

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on **Error! Hyperlink reference not valid.** include but are not limited to:

NAMD 2020 reflections: Together towards the future and MESC 2020: Where we are today and where we will be tomorrow.

Nicole Becnel, PMP®

<b>Proposed Project Role:</b>	Engagement Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Arts in Speech and Hearing Science, University of South Florida Certified Project Management Professional Executive Coaching Certification®

#### Overview

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

#### Experience

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

- **West Virginia Department of Health and Human Resources (DHHR) Bureau for Medical Services (BMS).**
  - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to present)*  
Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementing a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.
  - *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to present).*  
Nicole leads the project team implementing the overall EVV solution, which includes strategic planning, organizational change management, requirement development, RFP draft narratives and supporting documentation, certification planning and assistance, APD development and updates, evaluation and scoring

- support/facilitation, vendor onboarding, vendor deliverable review, and UAT planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).*  
Nicole is the Lead Project Manager for West Virginia's largest information technology transformation project, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
  - *APD Assistance (07/2010 to present)*  
Nicole is the Lead Project Manager overseeing the development and approval of Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.
  - *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*  
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
  - *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*  
Nicole was the Lead Project Manager overseeing the team, assisting the State help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.
  - *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*  
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide seamless care between the two programs and offer greater efficiency and innovation

opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

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

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add the Children's Health Insurance Program (CHIP) to the program. BerryDunn assisted the State with developing a Request for Proposal (RFP) to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted the increased quality of care, health outcomes, and data quality and efficiency for the State's managed care populations.

- *Provider Management Support (7/2019 to 1/2021)*

Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the MITA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that participate monthly.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).*

Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (8/2015 to 01/2020)*

Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training.

Organization development for the project will take the MITA SSA findings and focus on the DHHR goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*  
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
- *Provider Enrollment (PEA) Project (07/2011 to 12/2012).*  
Nicole supported the Bureau with her project, program and portfolio management and subject matter expertise as they implemented health care reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the state.
- *5010 Refresh Project (10/2011 to 08/2013).*  
Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.
- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*  
Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.
- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
  - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
  - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
  - *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
  - *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
  - *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*

- *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
- *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
- *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
- *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
- *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
- *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
- *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
- *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*
- *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Technical Assistance and Program Support (TAPS) (11/2018 to 10/2019)*
- *Electronic Visit Verification Solution Implementation (06/2018 to 12/2019)*
- *Provider Enrollment (PEA) Year 2 (05/2018 to 05/2019)*
- *Contract Edit Fee Schedule Review (09/2017 to 09/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 to 08/2018)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- *Provider Re-enrollment (PEA) (03/2017 to 02/2018)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Income Maintenance Manual (IMM) Update (09/2016 to 09/2017)*
- *Access to Care Project (Access Monitoring Plan Phase) (04/2016 to 10/2016)*
- *Updates to West Virginia Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*

- *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014 )*
- *Provider Enrollment (2012 to 2015 )*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).**

As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.
- **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.
- **Contract Configuration and Reports Lead for West Virginia MMIS.** Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.
- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

#### **Presentations**

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

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

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


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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	10+ years
<b>Certifications and Education:</b>	MPPM, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration on Policy Analysis Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis BA, Political Science and History, University of Maine at Farmington Certified Project Management Professional®, Project Management Institute® Prosci® Certified Change Practitioner Certified Lean Six Sigma Green Belt

**Overview**

Ethan is a manager for BerryDunn's Consulting Services Team with innovative Medicaid project and program experience across the range of the Medicaid enterprise. His specialties include negotiating Medicaid policy on behalf of states with their federal partners, program development, and team leadership. A practiced project manager in both Medicaid IT and policy projects, Ethan has engaged in key leadership roles in projects designed to evaluate federal compliance, design innovative 1115 and 1915(c) waivers, and implement health IT systems. He has a proven record of successfully managing both short-term projects and complex, multiyear initiatives. Most recently, he has led the Medicaid Innovation Program as part of the West Virginia Enterprise Portfolio Management Office (EPMO) where he oversaw a team of project managers, collectively leading multiple concurrent Medicaid projects.

**Key Qualifications**

- Three years' experience as a program manager, overseeing five concurrent successful Medicaid Enterprise projects and initiatives
- Certified Project Management Professional® leading seven multiyear Medicaid Enterprise projects to successful completion with project budgets ranging from \$100k to \$3.4mm
- Six years' experience successfully assisting state Medicaid agencies with critical initiatives such as the federal CMS negotiations of 1115 demonstration waivers, a 1915(c) Home- and Community-Based Services (HCBS) Waiver, and multiple State Plan Amendments (SPAs)

**Experience**

**BerryDunn (07/2014 to present)****West Virginia Bureau for Medical Services (BMS)**

- *ARPA Section 9817: HCBS Implementation Project (5/2021 to present).*  
Serving as program manager and lead, Ethan oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the American Rescue Plan Act (ARPA). The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased FMAP allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for West Virginia. The project continues in the implementation stage where Ethan leads workgroups, planning discussions and monitors controls execution of the implementation schedule.
- *ARPA Section 9813: Mobile Crisis Grant Project (7/2021 to present).*  
Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the West Virginia Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS is communications to CMS, our team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.
- *State Plan Review and Support (SPRS) Project (03/2020 to present).*  
In order to help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (state and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training state stakeholders on the new process flow.
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (06/2019 to present).*  
Ethan oversees a team of nine that assists the Department of Health and Human Resources (DHHR) in meeting compliance with the 88 requirements of the MITA 3.0 SS-A as prescribed by CMS. The objective of this project is to assist the DHHR with MITA life cycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2019, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update. BerryDunn's assistance with over a dozen

Advance Planning Document (APD) submissions has provided millions of dollars in value to the State.

- *Technical Assistance and Program Support Project (11/2018 to present).*  
Ethan oversees this project and provides project management, subject matter expertise, and support for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake—such as Third-Party Liability (TPL) procurement support, interim support for Payment Error Rate Measurement (PERM) audits, and mental health parity analysis. Ethan and his team provide critical project support such as program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development. To date, this team has helped BMS achieve its objectives on projects such as the development of Section 1135 Disaster SPAs, Managed Care Organization (MCO) readiness reviews, and Minimum Acceptable Risk Controls for Exchanges (MARS-E) Security and Privacy Assessment.
- *1915(c) Children with Serious Emotional Disturbance Waiver (CSEDW) Development Project (09/2018 to present).*  
As program manager, Ethan planned and executed the design, successful negotiation, and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for those enrolled in the CSEDW program. The CSEDW permits West Virginia to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs. Ethan continues to support the state with ongoing research, facilitation and implementation tasks in support of the CSEDW Program.
- *Enterprise Project Management Office (EPMO) (07/2018 to present).*  
As program manager of the Medicaid Innovations Program for the West Virginia BMS EPMO, Ethan leads a team of three project managers executing six Medicaid policy and program development projects. In this role, he is responsible for aligning project outcomes with the organization's overarching goals and master strategy for its Medicaid and human services enterprise.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*  
To support the success of phases 3 and 4 of this important project, Ethan oversees the project manager and deputy project leads. Ethan and the project team are working to ensure a quality program design that will meet the needs of West Virginia and those receiving vital support from this program by completing four quarterly reports to CMS, annual reports, and retrospective reviews of metrics for the state. In addition to overseeing ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan overseeing network adequacy assessments and other efforts to help ensure quality program design.

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

Working as the lead policy analyst and subject matter expert for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

- *Third Party Liability (TPL) Options Analysis and Procurement Assistance Project (07/2018 to 12/2018).*

As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. This included leading the project team through the investigation of both the solution and financing alternatives for the state. This research helped West Virginia save money in recoupments and system costs as well as conduct its Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018).*

As project manager, Ethan planned and led the execution of a large-scale Affordable care Act (ACA) compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables during the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.

- *Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017).*

As project manager, Ethan oversaw a team that collected and reported on the Medicaid Adult Core Set Measures to help BMS successfully transition from a grant-funded Quality Unit to a state-supported Quality Unit. As a result of this transition, the state can now report on the 33 measures of the Adult Core Set across six domains.

- *ICD-10 Transition Planning and Implementation (07/2014 to 02/2016).*

As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.

- *Utilization Management and Prior Authorization Services Request for Proposal (RFP) Development Project (09/2015 to 12/2015).*

As business analyst, Ethan organized and completed the final development of a state

Medicaid agency project to develop a major RFP to select a utilization management vendor. The project resulted in the successful award of the contract to Kepro.

**Puerto Rico Department of Health (PRDoH) (12/2020 to present)**

- *State Plan Support.*  
In order to support the Puerto Rico Medicaid Program (PRMP) Ethan served as a Subject Matter Expert for BerryDunn's state plan work. In this role, Ethan researches and analyzes the Medicaid state plan, drafts amendments, and reviews state plan materials. Ethan's work includes analyzing state plan provisions related to Hospital Based Presumptive Eligibility (HBPE), Modified Adjusted Gross Income (MAGI), and other major eligibility provisions of the State Plan.

**Nebraska Department of Motor Vehicles – Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 02/2017).**

As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current state assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

**Michigan Department of Education – Early Childhood Data Governance Structure (03/2016 to 06/2016).**

As a business analyst for the department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He also mapped and developed workflows to outline the progression and flow of data throughout the department, and outlined critical data questions and paths through which these could be resolved.

**West Virginia Bureau for Children and Families – Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016).**

Ethan served as project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated state MMIS and eligibility and enrollment vendors, served as a liaison with four state agencies, and helped facilitate a successful implementation.

**Colorado Department of Human Services (DHS) – Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 to 10/2014).**

Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.

**University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014)**

As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

**Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013)**

As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

**The Cutler Institute for Health and Social Policy (11/2012 to 01/2013)**

Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and SPAs, performing literature reviews, and assisting with general research.

**Education and Certifications**

MPPM, University of Southern Maine Edmund S. Muskie School of Public Service,  
Concentration on Policy Analysis

Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance  
Management and Measurement, and Social Policy Analysis

BA, Political Science and History, University of Maine at Farmington

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

Certified Lean Six Sigma Green Belt

**Susan Chugha, Prosci® CCP**

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	MLC Certified Medicaid Professional (MCMP-II) Prosci® Certified Change Practitioner BA, Business Management, Belmont Abbey College

**Overview**

Susan is a manager in the Government Consulting Group who brings over 16 years of project management experience. During the past five years, Susan has honed her expertise on policy and Medicaid program efforts in various roles, including project manager, business analyst, and project coordinator. She focuses her time and experience on 1115 waiver demonstrations, business process improvement, and project management.

**Experience**
**BerryDunn (10/2015 to present)**
**West Virginia Bureau for Medical Services (BMS).**

- *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).*  
Susan manages the current ongoing implementation phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables, e.g., project summary and schedule. She conducts deliverable review on all documents. She performs research on SUD services, CMS requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on time for federal submission.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development, negotiation, and approval phases of the project. She performed client outreach, managed communications with federal partners, scheduled meetings, captured meeting notes, tracked action items and decisions, conducted research, and business analysis. Also, during the waiver implementation phase, Susan managed the development of a peer recovery support specialist webinar and was involved in policy development, public comment tracking, and policy approval. Under the waiver development phase, Susan assisted the client with developing a continuum of care for Medicaid enrollees with SUD by overseeing waiver negotiations with the Centers for Medicare & Medicaid (CMS). She facilitated meetings, performed research analysis, assisted in draft policy development,

assisted with writing the waiver application, and created and maintained a work plan to track required tasks. Susan also scheduled and organized public hearings to promote the waiver application.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to present).*

As project manager for the MITA 3.0 SS-A Maintenance and Annual Update Assistance project Susan assists with MITA lifecycle maintenance activities including developing new business process improvement flows and updating MITA related reports. Susan manages nine consultants and two sub-contractors. Her responsibilities include oversight of the team, budget, and time management, and peer review and delivery of required deliverables. She is assisting with the update of the health information technology (HIT) companion guide, and monitors a team of subject matter experts to draft and deliver an organizational development (OD) plan and roadmap. She facilitates meetings and oversees the development of the revised aged and disabled waiver (ADW) business process flow workgroups.

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all of the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

- *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. She coordinated and executed multiple public forum events throughout the State of West Virginia to help bring awareness to the new 1915(c) HCBS waiver program that was under development and would be submitted for review and approval to CMS.

- *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).*  
As the project coordinator, Susan managed all meeting activities, as well as maintained the document repository. She attended weekly BMS procedure code meetings along with Medicaid policy review, and workgroup meetings to help ensure the new International Classification of Diseases (ICD)-10 codes were tested, and integrated into the MMIS to determine financial health and parity in claim operations.

#### **Independent Consultant (08/2010 to 10/2014)**

Susan worked with a select client group organizing events of all sizes, fulfilled shopping requests, maintained personal calendars and contact lists, managed correspondences and service provider relationships, scheduled travel arrangements, and professional and personal appointments. She acted as the property manager on a number of multi-million-dollar properties overseeing regular maintenance and care for each individual property, including motor vehicles and boats.

#### **Columbia Management (09/2012 to 10/2013)**

As a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the United States 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 Services, Inc. (EISI) (06/2004 to 05/2009)**

##### **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 more than 1,600 industry leaders and their families; ~\$1.5 trillion in assets under management was represented in the client base at this event
- Partnered with Training and Development team to coordinate internal training programs (onboarding, sales training, negotiation skills, product training) all around the United States 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 EISI and other members of the executive leadership team

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**Communications Coordinator/Project Manager – Officer**

- Created quarterly newsletters and other publications 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 onboarding 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, booking travel arrangements, processing expense reports, minute taking and distribution, and coordinating 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 more than 50 associates.

## Tonya Roloson

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	Associate of Science in Business Administration, State University of New York Delhi Bachelor of Science in Wellness Management, State University of New York Oswego Youth Police Initiative Certified trainer Youth Mental Health First Aid Certified Trainer Cornell TCI Certified Trainer

### Overview

Tonya is a consultant with experience working on Medicaid initiatives for various agencies and populations. She has more than 17 years' experience working with youth in residential programs as well as more than 5 years of experience as a Medicaid program manager. She is well-versed in claims, eligibility, stakeholder compliance, and federal and state regulations.

### Experience

**BerryDunn (11/2021-Present)** Senior Consultant in the Medicaid Practice group.

West Virginia Department of Health and Human Resources (DHHR)

- Medicaid Subject Matter Expert on the West Virginia Children's Severe Emotional Disturbance Home and Community Based Waiver project.
- Medicaid Subject Matter Expert on the West Virginia Mountain Health Promise (MHP) re-procurement project.
- Medicaid Subject Matter Expert on the West Virginia Mountain Health Trust (MHT) re-procurement project.
- Medicaid Subject Matter Expert for West Virginia Mobile Crisis Services Planning Project working to create a new State Plan Amendment for West Virginia Medicaid to provide Community Based Mobile Crisis Intervention Services.
- Medicaid Subject Matter Expert for the West Virginia Mental Health Parity Compliance Project that works to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and CHIP to ensure compliance with federally mandated mental health parity rules.

**PCG-SSO, New York Department of Health (11/2016 to 11/2021).** Tonya worked as the Medicaid program manager to collaborate with inter-agency State teams creating policy and implementation strategies for Children's Behavioral Health in NYS. She developed multiple Medicaid waivers and State Plan Amendments, including: 1115 demonstration waiver, 1915(c),

1915b.4, acted as a subject matter expert on program pieces relating to internal Requests for Proposals (RFPs). Tonya ensured RFPs were written directly to CMS standards, created work plans, and monitored timelines, working cross functionally with state agencies including: Office of Mental Health, Office of People With Developmental Disabilities, Office of Children and Family Services, Office of Addiction Services and Supports, New York state office of Temporary and Disability assistance, and Dept. of Health. She also reviews fee-for-service and Medicaid managed care claims, denial reports and utilization to develop reports for stakeholders and compliance. She engaged CMS directly, developed Medicaid policy, and reviewed financial/implementation reports for grant funded projects. Tonya also reviewed Medicaid Managed Care Plan readiness as related to model contract and Children's Behavioral/Physical Health Standards and reviewed policy according to department and program needs. She performed readiness and compliance reviews, liaised with stakeholders, and monitored and implemented policy for Medicaid billing and enrollment. She worked with stakeholders to develop or update state regulations and/or Public Health Law.

**St. Catherine's Center for Children (05/2014 to 11/2016).** Tonya worked as the director of training and staff development to maintain electronic records of staff performance son training compliance, facilitate agency training for employees (including medication management, documentation, crisis intervention, safety in the workplace, motivational interviewing, youth police initiative and youth mental health first aid), and reviewed policy, procedure, and compliance records across all agency programs. She maintained and created platforms for staff to attend and receive training while maintaining training documents and materials. Tonya monitored Medicaid and HIPAA compliance and reviewed policies as needed. She collaborated with the QA Team to ensure quality metrics were met and regularly attended Medicaid trainings to keep the teams and strategies were up to date. She reviewed case file notes, Medicaid eligibility, and monitored Medication Management compliance.

**RTF Parsons child and Family Center (08/2010 to 11/2016).** Tonya worked as a relief residential counselor in charge of caring directly for youth 12-18 in an OMH Residential treatment facility. She ensured accuracy on performance delivery within the program and that documentation standards were met. She also worked as a crisis prevention specialist to create individual crisis plans and practices while ensuring agency policies are maintained. In this role she maintained progress reports around goals and compliance measures and prepared monthly reports of data to show that standards were being met. Her initial positions as assistant residential supervisor and residential counselor had her oversee program operations, perform administrative duties, and maintain accurate documentation.

**"Choices Enhanced" Catholic Charities (08/2008 to 09/2010).** Tonya worked as the project director partnered with Syracuse University to create new policy, review policy of each contract partner and ensure all policy is consistent with program deliverables. She ensured program fidelity, quality assurance, and data collection procedures were strictly adhered to and wrote the RFP that was approved by health and human services, to address teen pregnancy. She developed program plan and implementation of new program under Scientific design (control and treatment groups in a community setting) while maintaining budget and supervising staff and payroll.

**Toomey Residential Program (04/2004 to 08/2009).** Tonya worked as a recreation specialist in direct care of youth 6-15 years old in an OMH Children's residential program. She supervised daily program activities and ensured accurate documentation and regulatory standards were met

Kitty Purington, JD

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	28 years
<b>Certifications and Education:</b>	Bachelor of Arts in History and Spanish, University of Massachusetts Juris Doctor, University of Maine School of Law

#### Overview

Kitty is an experienced Senior Consultant with nearly 30 years of experience with Medicaid. She has served in multiple leadership positions in state agencies, community organizations, and non-profits. She has a strong background in policy research and analysis, vendor and stakeholder management, and development and implementation of programs.

#### Experience

**Berry Dunn (05/2022 to present).** Kitty serves as a Subject Matter Expert (SME) with the Medicaid projects in West Virginia and Puerto Rico. As a SME, she researches policy issues, including State Medicaid Director Letters, proposed regulations and other federal guidance documents and prepares summaries of the relevant information for the client. In addition, she drafts Medicaid state plan amendments and reviews amendments prepared by other team members. Kitty also participates in team meetings and client meetings, including clients meetings with the Centers for Medicare and Medicaid Services, and is able to share information, expertise, and perspective from her previous role in Medicaid policy management.

**National Academy for State Health Policy (NASHP) (04/2015 to 05/2022).** As Senior Program Director, Kitty led the Behavioral Health, Aging, and Disability portfolio for NASHP, a national, non-partisan, mission-driven organization that supports state leaders in their work to improve health policy. She worked with private foundations, federal agencies, and partner organizations to develop and implement multi-year projects that focused on delivery system transformation, payment reform, implementation of best practices, and policy innovation. She designed and oversaw technical assistance and learning opportunities that supported state policy makers on a range of topics including Medicaid, behavioral health, long-term care, and value-based payment. Kitty researched, analyzed, and evaluated emerging state and federal health policy issues, oversaw the development and dissemination of briefs, blogs, webinars and other resources for state Medicaid, behavioral health, and long-term care officials, and facilitated meetings, webinars, and conference sessions to assist state health officials in problem solving and sharing best practices. She supervised team of professionals to manage grant development, contracts, budgets, and staffing.

**Office of MaineCare Services (OMS) (06/2012 to 04/2015).** Kitty worked as Program and Policy Manager of Value-Based Purchasing to with Maine HHS Commissioner's Office and agency leadership, to oversee the development, implementation, and ongoing growth and

improvement of OMS practice transformation and value-based purchasing initiatives. She developed and implemented state's Health Home regulatory framework (state plan amendments, Medicaid regulation, provider contracts, licensing and certification related to payment and provider requirements) in collaboration with OMS Office of Policy and State Attorney General's Office. She also developed and implemented comprehensive quality and compliance strategies. Kitty worked with OMS Operations team and external vendors to implement online portal and set of tools for primary care and behavioral health providers to support population-based care coordination, physical and behavioral health integration, panel assignment and management, and quality improvement. She collaborated with internal and external stakeholders (related state agencies, providers, peer leaders, family and advocacy organizations) on program development and implementation; oversaw communications, including production of member materials, provider communications and technical assistance, webinars, and public forums; and developed the State Innovation Plan and behavioral health-related initiatives for successful \$30 million CMS State Innovation Model grant; served as liaison post-award on projects such as HIE connectivity for Behavioral Health Home providers, learning collaboratives, and work force development. She also developed concept paper for Maine's Accountable Communities initiative; worked with internal and external stakeholders on total cost of care methodology and quality strategy.

**National Academy for State Health Policy (1/2009 to 06/2012).** Kitty worked as a Policy Specialist to Managed NASHP activities and deliverables under a 5-year project funded by the Substance Abuse and Mental Health Services Administration focused on promoting evidence-based practices for adults, older adults, and children with behavioral health needs in state Medicaid programs. Collected and analyzed comprehensive state policy data related to Assertive Community Treatment, Supportive Housing, Medication Assisted Treatment, and other evidence-based services. She provided technical expertise and analysis on Medicaid and other state policies topics, including behavioral health, value-based purchasing, health information technology and exchange, data analytics, behavioral health privacy and confidentiality issues, and quality measurement. She also developed materials and facilitated activities to promote state learning objectives

**Community Counseling Center (01/2007 to 01/2009).** Kitty served as the Director of Government and Business Affairs to develop and direct legislative strategy for a large community mental health center. She identified new business opportunities and strategic initiatives for the organization resulting in programs and partnerships on physical and behavioral health care integration, school-based health centers, and pre-trial behavioral health supports for correction-involved women. Kitty provided ongoing analysis and information regarding regulatory, reimbursement, and policy changes at federal, state, and local level.

**Maine Associations of Mental Health Services (11/2001 to 01/2007).** Kitty served as Interim Executive Director and Policy Analyst to provide leadership and strategic planning to board of directors on a variety of issues for statewide provider trade association of mental health and substance use disorder provider organizations, including development of new governance structure and bylaw changes, planning and implementation of legislative agenda. She worked with state and federal agencies in advocacy, interpretation, and development of rules, legislation, and standards pertinent to reimbursement and delivery of behavioral health services.

She represented the Association in a variety of forums, including as chair of the Governor's Medicare Part D Implementation Task Force, chair of the state Medicaid Advisory Committee, and member of the Policy Committee of the National Council for Community Behavioral Health. **Legal Services for the Elderly (12/1998 to 11/2001).** Kitty worked as a Staff Attorney to provide legal counsel to low-income seniors on a variety of elder law topics such as public benefits, estate planning, health care coverage, and disability matters.

**National Alliance for the Mentally III (10/1993 to 05/1996).** Kitty worked as a Managed Care Policy Analyst to analyst Medicaid managed care policies for the state chapter of a national advocacy organization.

**Brody J. McClellan, MPA**

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	<p>Bachelor of Arts in Political Science, Michigan State University</p> <p>Master of Public Administration, focus in Health &amp; Human Services Administration, University of Arizona</p> <p>CPA Exam Prep, Accounting AB</p>

**Overview**

Brody is an innovative consultant with 14 years of experience in Medicaid, including as a state administrator and program officer with Michigan's Medicaid Actuarial Division, Outreach and finance specialist at an academic medical center, and work as a consulting project lead for California's Medicaid Directed Payments. Subject matter expert in Medicaid finance with experience in program operations, Intergovernmental Transfers, Directed Payments, Pass-Through Payments, UPL programs, charity donation leveraging, Graduate Medical Education programs, and encounter data management. Collaborative communicator continually focused on building relationships and promoting synergy across business lines and global units to drive positive change, cohesive, comprehensive business approaches, and enhanced profitability

**Experience**
**BerryDunn (09/2021 to present)**
**West Virginia Department of Health and Human Resources (DHHR) (09/2021 to Present)**

- ✓ *Mobile Crisis Services Planning Project (09/2021 to present)*  
Brody serves as Project Lead to create a new State Plan Amendment for West Virginia Medicaid to provide Community Based Mobile Crisis Intervention Services.
- ✓ *Mental Health Parity Compliance Project (09/2021 to present)*  
Brody serves as Project Lead to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and CHIP to ensure compliance with federally mandated mental health parity rules.
- ✓ *Mountain Health Promise (MHP) re-procurement project (09/2021 to present)*  
Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.
- ✓ *Mountain Health Trust (MHT) re-procurement project (09/2021 to present)*  
Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.
- ✓ *Medicaid Enterprise Systems (MES) re-procurement project (09/2021 to present)*  
Brody serves as Medicaid Finance and Actuarial Subject Matter Expert

**Puerto Rico Department of Health Medicaid Program (12/2021 to present).** Brody serves as Medicaid Finance and Actuarial Subject Matter Expert on the Puerto Rico finance and policy support team.

**Mercer GHSC (10/2019 to 07/2020).** Brody worked as a senior consultant with roles as project manager and project lead for two actuarial rates team for California Medicaid. Both teams combined were responsible for rate development with impact amounts of over \$9 Billion annually. He also served as Subject Matter Expert on various national Medicaid Financing advising projects. As project manager and lead, he improved business operations on actuarial rates teams focused on Directed Payments and Medicaid Eligibility. His work included managing credentialed actuaries throughout rate setting cycles to produce certified rates, formal project planning creations, analysis of project process, rate setting modeling process review, documentation process review, and process engineering analysis to correct problematic projects in line with management directives. Brody was also responsible for the creation of consulting communication training to assist staff and enhance effectiveness on external debriefing and client interaction and corporate intellectual capital including CMS pre-print responses and program design language, financial modeling templates and writing external articles. Brody was recognized as a technical and policy specialist for Medicaid Rates and Managed Care structure; Medicaid Upper Payment Limit (UPL) rules, and methodologies such as hospital UPL and physician UPL programs

**Independent Consultant (10/2019 to 06/2020).** Brody served as an independent consultant with broad subject matter specialty in Health Insurance and Public Safety Programs including Medicaid. He partnered with clients to establish, sustain, and fortify business relationships while leveraging business development opportunities. He offered expertise in program implementation and bridging communication between senior decision makers and technical stakeholders.

**Sellers Dorsey & Associates, LLC (10/2017 to 10/2019).** Brody worked as a senior consultant with scopes of work experience in 16 states. He advised clients including hospital systems, physician practice groups, associations, and state Medicaid agencies on a variety of Medicaid subject areas, focusing on Medicaid special financing programs. He also functioned as a Health Policy Specialist, General Medicaid financial and budget specialist, and General advisor on Medicaid Waiver programs (115 waivers). He created policy documents adopted and used by state governments and developed rate analytics accepted by federal government as methodologically sound.

**Michigan State University (04/2015 to 10/2017).** Brody worked as the Medicaid Federal Leveraging Specialist & Access to Care Program Manager (Medicaid Special Financing Project) as well as Data Science & Analytics/Business Intelligence Cell lead for the University. He delivered high-level program financial management and control including invoicing, payments and encumbrances processing, intergovernmental transfer processing, and revenue control functions. He provided oversight of two subordinates responsible for program management and support and also directed cross-functional teams across the organization. He administered over 100 contracts, consulted with contracted affiliate Hospital and Provider Clinics regarding Medicaid compliance, program structure, and access to care issues and financial maximization strategies allowed within compliance standards, and liaised with the State of Michigan Medicaid Office.

**State of Michigan (12/2007 to 04/2015)** Brody worked as a department specialist to extract and analyze data from diverse sources including the MSA data warehouse using all available software and tools. He created and managed—what was at the time—the largest Medicaid physician "special financing" program in the country, and designed and implemented ACA mandated primary care rate increase program. Brody served as senior analyst with program management functions for multiple special financing projects, assisted rate specialists, and executed quarterly database analysis and calculations needed to reprice public physician entity (PE) fee-for-service claims pursuant to the Physician Adjuster Payment policy. He also performed annual database analysis to determine the amount of SNAF load to include in the upcoming year's managed care capitation rates and executed reconciliations and other support procedures as needed to insure the proper flow of SNAF funds between MSA, the health plans and the public entities.

Dawn Webb, BSHL, CPC, COC

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	9 years
<b>Certifications and Education:</b>	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.

#### Experience

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

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

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

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

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

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

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

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

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

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

#### **Professional Affiliations**

American Academy of Professional Coders, Local Chapter Secretary, 1999

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

## Kirsten Siebenga, MPH

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	2.5 years
<b>Certifications and Education:</b>	Bachelor of Science in Community Health Education and Political Science, Minnesota State University Master of Public Health, University of North Carolina Chapel Hill

### Overview

Kirsten is a consultant with BerryDunn's Medicaid Practice Group with a background in public health. She is an experienced health policy specialist with background working with various Medicaid topics. She has built strong technical skills developing and conducting policy analysis, leading stakeholder engagement, and meeting coordination.

### Experience

#### BerryDunn (06/2022 to present)

- **West Virginia Bureau for Medical Services**
  - *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (06/2022 to present)*  
As a CSED Phase IV project team member, Kirsten assists BMS with the development and submission of the application for the upcoming CSED Waiver renewal, providing research and other technical assistance.
  - *ARPA Section 9817: HCBS Implementation Project (06/2022 to present).*  
As a policy analyst and project coordinator, Kirsten assists with the ongoing implementation of programs and policy changes resulting from the 2021 ARPA HCBS FMAP increase. Her work has included CMS reporting, policy research, analysis of LTSS programs, as well as vendor procurement.

**North Carolina Institute of Medicine (01/2022 to 06/2022).** As a research assistant, Kirsten assisted with coordination of task force meetings for the Oral Health Transformation Initiative, a collaboration with state partners to advocate for the inclusion of oral health in NC Medicaid Managed Care. She supported task force coordination by researching potential members, issuing and tracking invitations, and developing participant lists. Kirsten contributed to task force materials and reports by writing and editing materials while independently developing content for the North Carolina Medical Journal blog.

**UNC Lineberger Comprehensive Cancer Center (06/2022 to 08/2022).** As the youth engagement developer, Kirsten independently conceptualized activities to engage youth across the country that highlighted the tactics used by the vaping industry to target youth on social

media platforms and to further support the vaping prevention resource's (VPR's) vision of a world where vaping is no longer a threat to the health of young people. She surveyed VPR's literature review on tactics used by the vaping industry to target youth to inform an evidence-based youth engagement curriculum and conducted a review of other prominent youth vaping resources to help ensure VPR was putting out a novel activity. Kirsten gathered feedback from the VPR team to align with the organization's mission and also recruited and conducted focus sessions with teens from across the country to gather feedback on the curriculum.

**North Carolina Institute of Public Health (12/2020 to 06/2021).** Kirsten worked as a training developer and devised and implemented the oral health section of the North Carolina Healthy Schools curriculum, which assisted educators through education, resources, and strategies for combatting common student health challenges during the COVID-19 pandemic. She reviewed literature to identify the most common oral health issues facing K-12 students in North Carolina to inform the training and communicated with dental health and public health experts in the state to gather feedback on the oral health trainings to confirm the trainings were accurate, effective, and efficacious. Kirsten designed and developed the visual slides and audio recordings for the training modules to familiarize adult learners using the North Carolina Healthy Schools website of oral health issues facing their students.

**Mayo Clinic (01/2020 to 03/2020).** As the employee well-being intern, Kirsten identified common workplace health concerns from the employee wellness survey of the over 60,000 employees in order to develop impactful and effective employee well-being resources. She spearheaded a panel discussion for employees on finding joy in the workplace featuring experts on stress and workplace wellness from around the Mayo Clinic. Kirsten also created a section for a column in the Employee Well-being newsletter about strategies for practicing gratitude to support employees struggling with burnout.

## Jordan Ramsey, MA

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Senior Editor
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	<p>Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign</p> <p>Master of Arts in English: Professional Writing, Southeastern Missouri State University</p>

### 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.

### 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

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Senior Content Administrator
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	<p>Bachelor of Science in Film, Boston University College of Communication</p> <p>Master of Fine Arts in Creative Writing, Stonecoast MFA Program, University of Southern Maine</p> <p>Prosci® Certified Change Practitioner</p>

### 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.

### 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 copywriter and research master. Her position entailed writing product advertisements, conducting extensive product research, and assisting with product handling and maintenance.

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**Carole Ann Guay**


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<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	Currently working towards Bachelor of Science 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.

**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.

## Caitlin Cabral

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

### Overview

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

### Experience

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

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

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

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

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

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

## Emily Hendrickson

<b>Proposed Project Role:</b>	Project Management Support Services
<b>Role at BerryDunn:</b>	Paraprofessional
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Arts in English Literature and Language, Gordon College Bachelor of Arts in 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.

### 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 workflow. She performed quality review of documents after scanning to ensure accuracy and completeness of the electronic file; assembled, collated, and logged tax returns for accountants; and reviewed returns to ensure figures tied, return was in order, and any attachments were included.

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

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

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

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

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

## Janine DiLorenzo

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

### Overview

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

### Experience

**BerryDunn (01/2022 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.

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**Molly Hawkinson**


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<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Senior Writer/Editor
<b>Years of Experience Relevant to Proposed Role:</b>	3 years
<b>Certifications and Education:</b>	Certificate, Editing, University of Washington BS, Media and Communication, New York University Poynter ACES Certified Editor Lean Six Sigma Green Belt Certification

**Overview**

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

**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.

## Jonathan Williams

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Editor
<b>Years of Experience Relevant to Proposed Role:</b>	15 years
<b>Certifications and Education:</b>	BA, English, Bowling Green State University Member of Golden Key National Honor Society Member of Alpha Lambda Delta Honors Society

### Overview

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

### Experience

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

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

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

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

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

## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
2	Monthly Status Report	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
3	Risks, Issues, Action Items and Decisions Log	BerryDunn will develop and maintain project action item, risk, issue, and decisions logs for the life of the project.
4	Project Timeline	BerryDunn will create a visual list document that will provide an overview of the project's tasks, deliverables, and milestones.
5	Completed SPA	BerryDunn will produce a formal document called the SPA that will describe how the state will administer its CCBHC program. The SPA will authorize the CCBHC services once approved by CMS.
6	SPA Public Notice Materials, as needed	BerryDunn will develop any necessary documents needed to support the SPA Public Notice period, such as a draft SPA, public announcement and/or fliers for public awareness, and any other document as requested by BMS.
7	Project Closeout Summary	The Project Closeout Summary will be an inventory of all project documentation and deliverables and documentation of the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



STATE OF WEST VIRGINIA  
DEPARTMENT OF HEALTH AND HUMAN RESOURCES  
BUREAU FOR MEDICAL SERVICES  
Office of Procurement Services

Bill J. Crouch  
Cabinet Secretary

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

Cynthia E. Beane  
Commissioner

DATE: August 29, 2022  
TO: DHHR Finance  
FROM: James Atkins II *JAT*  
BMS Procurement Services  
RE: Funding Memo for PF1096926 CDO BMS23\*11

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

BMS anticipates making payments for months 1-8 in SFY23 and months 9-12 in SFY24.  
Contract service period: 09/19/22-08/31/23. Funding allocation table below:

CDO BMS23\*11  
SPA Project

	09/19/2022-08/31/2023 12 Months		Total:
	PRO5 SFY23 Months 1-8	PRO7 SFY24 Months 09-12	
EM	25 Hours @ \$270=\$6,750	12 Hours @ \$270=\$3,240	\$9,990.00
LPM	25 Hours @ \$215=\$5,375	12 Hours @ \$215=\$2,580	\$7,955.00
GPM	1,379 Hours @ \$175=\$241,325	688 Hours @ \$175=\$120,400	\$361,725.00
SS	572 Hours @ \$80=\$45,760	284 Hours @ \$80=\$22,720	\$68,480.00
	299,210.00	148,940.00	448,150.00

Thank you for your consideration. If you have any questions or need additional information, please do not hesitate to contact me at 304-352-4319 or at [James.w.Atkins@wv.gov](mailto:James.w.Atkins@wv.gov)