State of West Virginia
Delivery Order

Order Date: 09-08-2022

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 BMS2300000012 1	**Procurement Folder:**	1097602
Document Name:	Medicaid Information Technology Architecture(MITA) 3.0	**Reason for Modification:**	
Document Description:	Medicaid Information Technology Architecture(MITA) 3.0		
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

Vendor Customer Code: 000000100150
BERRY DUNN MCNEIL & PARKER LLC
2211 CONGRESS ST

PORTLAND   ME   04102
US

Vendor Contact Phone: 6813138905   **Extension:**

Discount Details:

	Discount Allowed	Discount Percentage	Discount Days
#1	No	0.0000	0
#2	No		
#3	No		
#4	No		

DEPARTMENT CONTACT

Requestor Name:	James W Atkins
Requestor Phone:	(304) 352-4319
Requestor Email:	james.w.atkins@wv.gov

23

FILE LOCATION _____

INVOICE TO

PROCUREMENT OFFICER: 304-352-4286
HEALTH AND HUMAN RESOURCES

BUREAU FOR MEDICAL SERVICES

350 CAPITOL ST, RM 251

CHARLESTON   WV 25301-3709

US

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

Purchasing Division's File Copy

Total Order Amount:	$1,224,250.00

ENTERED

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

ENCUMBRANCE CERTIFICATION
DATE: Beverly Tolen 9-27-22
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Annual Update 2021 Project

Dates of Service: 09/19/2022 - 02/29/2024

Total: $1,224,250.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$34,830.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-09-19	2024-02-29				

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:
Lead Project Manager: Base Year One

Hourly Rate: $215.00

Ed Daranyi 162 Hours @ $215 = $34,830.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$38,880.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-09-19	2024-02-29				

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:
Engagement Manager: Base Year One

Hourly Rate: $270.00

Nicole Becnel 144 hours @ $270 = $38,880.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$997,500.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-09-19	2024-02-29				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:
General Project Manager: Base Year One

Hourly Rate: $175.00

Peter Alfey 100 hours @ $175 = $17,500
Meghann Slaven 271 hours @ $175 = $47,425
Susan Chugha 603 hours @ $175 = $105,525
Tom Hunter 370 hours @ $175 = $64,750
Dot Ball 720 hours @ $175 = $126,000
Ed Crawford 900 hours @ $175 = $157,500
Cynthia Taylor 720 hours @ $175 = $126,000
Dawn Webb 180 hours @ $175 = $31,500
Julie DuPuis 900 hours @ $175 = $157,500
Jim Strasenburgh 468 hours @ $175 = $81,900
Jeff Stoddard 468 hours @ $175 = $81,900

Total: 5,700 hours @ $175 = $997,500

Line		Commodity Code	Quantity	Unit	Unit Price	Total Price
4		80101600	0.00000		$0.0000	$153,040.00
Service From		Service To	Manufacturer		Model No	Delivery Date
2022-09-19		2024-02-29				

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

Extended Description:
Project Management Support Staff: Base Year One

Hourly Rate: $80.00

Melinda Trail 720 hours @ $80 = $57,600
Amie Maynard 450 hours@ $80 = $36,000
Jordan Ramsey 124 hours @ $80 = $9,920
Karla Fossett 123 hours @ $80 = $9,840
Carol Ann Guay 124 hours @ $80 = $9,920
Molly Hawkinson 124 hours @ $80 = $9,920
Emily Hendrickson: 124 hours @ $80 = $9,920
Jon Williams 124 hours @ $80 = $9,920

Total: 1,913 hours @ $80 = $153,040

STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES
Office of Procurement Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301-3712
Telephone: (304) 558-1700   Fax: (304) 558-4398

Bill J. Crouch
Cabinet Secretary

Cynthia E. Beane
Commissioner

DATE: August 30, 2022

TO: DHHR Finance

FROM: James Atkins II
           BMS Procurement Services

RE: Funding Memo for PF1097602 CDO BMS23*12

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 9-18 in SFY24. Contract service period: 09/19/22-02/29/24. Funding allocation table below:

CDO BMS23*12
MITA Project

	09/19/2022-02/29/2024 18 Months PR05 SFY23 Months 1-8	PR07 SFY24 Months 09-18	Total:
EM	64 Hours@ $270=$17,280	80 Hours@ $270=$21,600	$38,880.00
LPM	72 Hours @ $215=$15,480	90 Hours @ $215=$19,350	$34,830.00
GPM	2,500 Hours @ $175=$437,500	3,200 Hours @ $175=$560,000	$997,500.00
SS	850 Hours @ $80=$68,000	1,063 Hours @ $80=$85,040	$153,040.00
	538,260.00	685,990.00	1,224,250.00

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

b BerryDunn

August 23, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Bureau for Medical Services (BMS) in implementing the Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Annual Update 2021 project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 18 months. BerryDunn agrees to a SOW start date effective when the SOW is approved, which may be on or after September 19, 2022.

Assuming a start date of September 19, 2022, the work would then conclude on February 29, 2024. BerryDunn will honor the current, pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

Nicole Y. Becnel

Nicole Becnel
Principal
681-313-8905

Robert Price
Agree

b, BerryDunn

Staffing Plan and Scope of Work for the
West Virginia Department of Health and Human Resources (DHHR) and
Bureau for Medical Services (BMS)
Medicaid Information Technology Architecture (MITA) 3.0 State Self-
Assessment (SS-A) Annual Update 2021 Project
Prepared for CMA #HHR21*03—Final

Submitted by:

Eduardo Daranyi, PMP®, Principal
Nicole Becnel, PMP®, Principal
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207-541-2244
edaranyi@berrydunn.com
nbecnel@berrydunn.com

Submitted on:

August 23, 2022

berrydunn.com

Staffing Plan and Scope of Work (SOW) for the West Virginia (State) Department of Health and Human Resources (DHHR), Bureau for Medical Services (BMS) Medicaid Information Technical Architecture (MITA) 3.0 State Self-Assessment (SS-A) Annual Update 2021 Project

This SOW describes the tasks BerryDunn will perform to assist DHHR and BMS with the MITA 3.0 SS-A Annual Update 2022 Project. This SOW is henceforth referred to as the MITA 3.0 SS-A Annual Update 2021 SOW.

1.0 Key Information

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the MITA 3.0 SS-A Annual Update 2021 Project.

Estimates for this SOW are based on the following assumptions:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the project Microsoft SharePoint site and will be brought to the attention of the BMS project sponsor.

- Deliverables will be provided in an agreed-upon format.

- The State leadership team will consist of Cynthia Beane (Commissioner, BMS) as the Project Sponsor, and Sarah Young (Deputy Commissioner, BMS) as the BMS Project Lead.

- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.

- The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA Advance Planning Document [APD]) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) 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 $1,224,250 (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.

- The BerryDunn leadership team will consist of Nicole Becnel providing engagement management, Ed Daranyi as the lead project manager, Meghann Slaven providing program oversight, and Susan Chugha serving as project lead.

- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 18 months.

2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	**Engagement Oversight** *Service Approach* BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables. BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables. *Deliverable(s)* • Deliverable 01: Monthly Commissioner Briefing *Completion Criteria* Engagement Oversight will be deemed complete upon signature acceptance of the D12: Project Closeout Summary by the DHHR project sponsor or his/her designee.	Nicole Becnel Ed Daranyi Peter Alfrey Meghann Slaven Susan Chugha	98
2.0	**Project Execution and Control** *Service Approach* Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues impacting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include: • Conducting a kickoff meeting with key stakeholders to validate business process	Peter Alfrey Meghan Slaven Susan Chugha Melinda Trail Amie Maynard Jordan Ramsey Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Jon Williams	180

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	owners and State goals and objectives, as needed • Developing a project timeline • Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings • Preparing monthly project status updates, risks, issues, and briefings for the State leadership team • Managing project logs (action item, decision, issue, and risk tracking) • Storing project documentation repository in an agreed-upon SharePoint location *Deliverable(s)* • Deliverable 02: Monthly Status Report • Deliverable 03: Action Items, Decisions, Issues, and Risks Project Log *Completion Criteria* Project Execution and Control will be deemed complete upon successful completion of the project and signature acceptance of D12: Project Closeout Summary by the DHHR project sponsor or his/her designee.		
3.0	**MITA 3.0 SS-A Annual Update Assistance** *Service Approach* BerryDunn will perform the following tasks to assist with activities that will prepare for the submission of the MITA 3.0 SS-A Annual Update 2022. Research and Assessment • Update MITA templates for the annual update documentation via the MITA database • Collect information on ongoing projects, including evidence of system and process improvements for the business processes • Assess and document the business processes that have been identified • Conduct internal and external stakeholder fact-finding sessions, as needed, for each business process to understand:	Meghann Slaven Susan Chugha Tom Hunter Dot Ball Ed Crawford Cynthia Taylor Dawn Webb Julie DuPuis Jim Strasenburgh Jeff Stoddard Melinda Trail Amie Maynard Jordan Ramsey Karla Fossett	7,611

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	o Current business process environment o Data flows o Desk-level procedures (DLPs) o Systems access o Staff expectations o Updates to be made, if applicable • Identify changes from the TO-BE environment in the 2020 SS-A AU report to the As-Is environment in the new 2022 SS-A AU report • Update business process forms and capability matrices • Complete and analyze scorecards, business profile reports, and performance measures to determine process improvements for each architecture and the Seven Conditions and Standards within each business process • Revise the MITA SS-A AU report, roadmap, gap analysis, business process summary documents, and the concept of operations documents, including subject matter expert (SME) review of all documents • Update the Data Management Strategy (DMS) and Technical Management Strategy (TMS) reports; recording all updates to gaps, activities, and solutions identified • Update the Health Information Technology (HIT) Assessment Report • Validate findings with BMS leadership, capture changes, follow up on action items, revise assessment for final version, and obtain approval • Provide enterprise-wide MITA support for ongoing system and business process improvement projects, including APD assistance • Deliver training and MITA-related materials for BMS new hires upon request. *Deliverable(s)* • Deliverable 04: MITA SS-A AU Report • Deliverable 05: MITA Roadmap • Deliverable 06: Scorecards	Carole Ann Guay Molly Hawkinson Emily Hendrickson Jon Williams	

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	• Deliverable 07: DMS		
	• Deliverable 08: TMS		
	• Deliverable 09: HIT Assessment Report		
	• Deliverable 10: Copies of all database files, in an agreeable format		
	• Deliverable 11: Tentative – Enterprise-wide MITA support and APD assistance, if determined required by the State		
	The MITA 3.0 SS-A Annual Update Assistance phase of the project will be deemed complete upon D12: Project Closeout Summary.		
4.0	**Project Closeout** BerryDunn will prepare the Deliverable 12: Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. *Deliverable(s)* • Deliverable 12: Project Closeout Summary *Completion Criteria* BerryDunn services will be considered complete when the State project sponsor or his/her designee formally accepts and signs the Project Closeout Summary.	Peter Alfrey Meghann Slaven Susan Chugha Melinda Trail Amie Maynard Jordan Ramsey Karla Fossett Carole Ann Guay Molly Hawkinson Emily Hendrickson Jon Williams	30
Total Hours			7,919
Total Not-To-Exceed Cost Estimate			**$ 1,224,250**

3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 1 in CMA #HHR21*03.

Table 2: Project Resources

CL Year 2	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
7	LPM	$215	Ed Daranyi	162	$ 34,830
8	EM	$270	Nicole Becnel	144	$ 38,880
10	GPM	$175	Peter Alfrey	100	$ 17,500
10	GPM	$175	Meghann Slaven	271	$ 47,425
10	GPM	$175	Susan Chugha	603	$ 105,525
10	GPM	$175	Tom Hunter	370	$ 64,750
10	GPM	$175	Dot Ball	720	$ 126,000
10	GPM	$175	Ed Crawford	900	$ 157,500
10	GPM	$175	Cynthia Taylor	720	$ 126,000
10	GPM	$175	Dawn Webb	180	$ 31,500
10	GPM	$175	Julie DuPuis	900	$ 157,500
10	GPM	$175	Jim Strasenburgh	468	$ 81,900
10	GPM	$175	Jeff Stoddard	468	$ 81,900
11	SS	$80	Melinda Trail	720	$ 57,600
11	SS	$80	Amie Maynard	450	$ 36,000
11	SS	$80	Jordan Ramsey	124	$ 9,920
11	SS	$80	Karla Fossett	123	$ 9,840
11	SS	$80	Carol Ann Guay	124	$ 9,920
11	SS	$80	Molly Hawkinson	124	$ 9,920
11	SS	$80	Emily Hendrickson	124	$ 9,920
11	SS	$80	Jon Williams	124	$ 9,920
			Total Hours	**7,919**	**$ 1,224,250**

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

4.0 Project Hours and Costs per Month

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

- 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 Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	8	9	300	107	424	$ 65,155
Month 2	8	9	300	107	424	$ 65,155
Month 3	8	9	300	106	423	$ 65,075
Month 4	8	9	300	106	423	$ 65,075
Month 5	8	9	325	106	448	$ 69,450
Month 6	8	9	325	106	448	$ 69,450
Month 7	8	9	325	106	448	$ 69,450
Month 8	8	9	325	106	448	$ 69,450
Month 9	8	9	325	106	448	$ 69,450
Month 10	8	9	325	106	448	$ 69,450
Month 11	8	9	325	106	448	$ 69,450
Month 12	8	9	325	106	448	$ 69,450
Month 13	8	9	325	106	448	$ 69,450
Month 14	8	9	325	106	448	$ 69,450
Month 15	8	9	325	106	448	$ 69,450
Month 16	8	9	315	107	439	$ 67,780
Month 17	8	9	305	107	429	$ 66,030
Month 18	8	9	305	107	429	$ 66,030
Total	**144**	**162**	**5,700**	**1,913**	**7,919**	**$ 1,224,250**

High-Level Timeline

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

Figure 1: Proposed High-Level Timeline
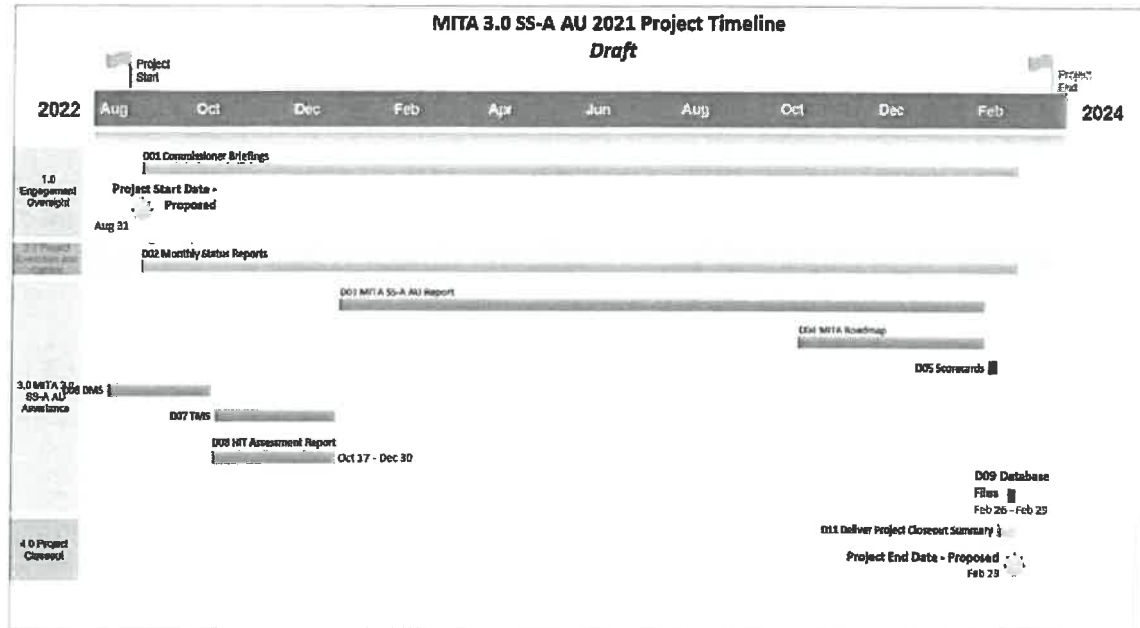
BerryDunn Authorized Signature

As a principal of this firm in our 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 _____   August 23, 2022 _____
Signature   Date

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

Sarah Young, Deputy Commissioner

Digitally signed by: Sarah Young, Deputy Commissioner
DN: CN = Sarah Young, Deputy Commissioner email = sarah.k.young@wv.gov C = US O = Medical Services OU = WV DHHR
Date: 2022.08.29 14:36:48 -05'00'

08/29/2022 _____

Signature   Date

Appendix A: Resumes

Eduardo Daranyi, MEd, PMP

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	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)*
    - *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 www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together towards the future and MESC 2020: Where we are today and where we will be tomorrow.

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	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.

o *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).* Nicole is the Lead Project Manager for West Virginia's largest information technology transformation project, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.

o *APD Assistance (07/2010 to present)* Nicole is the Lead Project Manager overseeing the development and approval of Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.

o *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).* Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of $37 million in federal relief funding for public health initiatives related to COVID-19.

o *Mountain Health Promise (MHP) Implementation Project Management Support*

(03/2020 to 06/2020)
Nicole was the Lead Project Manager overseeing the team, assisting the State help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

o *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

o *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 to 09/2020)*
Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add the Children's Health Insurance Program (CHIP) to the program. BerryDunn assisted the State with developing a Request for Proposal (RFP) to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over $5 billion and promoted the increased quality of care, health outcomes, and data quality and efficiency for the State's managed care populations.

o *Provider Management Support (7/2019 to 1/2021)*
Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the 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.

- o *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:
  - o *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
  - o *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
  - o *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
  - o *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
  - o *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
  - o *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
  - o *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
  - o *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
  - o *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
  - o *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
  - o *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
  - o *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
  - o *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*
  - o *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*

- o *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- o *Technical Assistance and Program Support (TAPS) (11/2018 to 10/2019)*
- o *Electronic Visit Verification Solution Implementation (06/2018 to 12/2019)*
- o *Provider Enrollment (PEA) Year 2 (05/2018 to 05/2019)*
- o *Contract Edit Fee Schedule Review (09/2017 to 09/2018)*
- o *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- o *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 to 08/2018)*
- o *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- o *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- o *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- o *Provider Re-enrollment (PEA) (03/2017 to 02/2018)*
- o *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- o *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- o *Income Maintenance Manual (IMM) Update (09/2016 to 09/2017)*
- o *Access to Care Project (Access Monitoring Plan Phase) (04/2016 to 10/2016)*
- o *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)*
- o *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- o *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- o *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- o *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- o *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- o *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- o *PPACA Workgroup Oversight (2012 to 2015)*
- o *5010 System Refresh (2012 to 2015)*
- o *HIT Statewide Strategic Plan development (2012 to 2014)*
- o *Provider Enrollment (2012 to 2015)*
- o *MITA 3.0 Organizational Redesign (2013)*
- o *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

Peter Alfrey, PMP, Prosci° CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in Journalism and Communication, Spanish Minor, University of Oregon
	Master of Arts in History, Providence College
	Certified Project Management Professional
	LEAN Six Sigma Green Belt Certification
	Prosci® Certified Change Practitioner

Overview

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

Experience
BerryDunn (03/2014 to present).
- **West Virginia Bureau for Medical Services (BMS)**
  - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).* Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and advance planning document (APD) development; and research and tracking of industry trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's Medicaid enterprise system, managed care organization (MCO) and data/analytics programs providing program oversight. EPMO projects and programs include:
    - *Organization Development Services (Scheduled to start 06/2022)*
    - *Public Health Emergency (PHE) Support (12/2021 to present)*
    - *Access to Care (09/2021 to present)*
    - *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I and II (10/2020 to present)*

- MCO Encounter Data Quality—Phases I and II (06/2020 to 02/2022).
- Mental Health Parity and Behavioral Health Services Support (05/2020 to present)
- Data Improvement Project—Phases I, II and III (09/2019 to present).
- Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present).
- Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to 06/2021), and MHT Re-Procurement (03/2020 to present)
- Contact Tracing (04/2020 to 09/2020).
- Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise (MHP) Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to present)

o MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).
o Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019).

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

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

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

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

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and user acceptance testing (UAT) support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables

across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

- **West Virginia Children's Health Insurance Program (WVCHIP)**
    - *Operational Readiness Review (09/2020 to 01/2021)*
    - *MCO Transition Planning Project Phases I and II (03/2019 to present).* Peter provides project oversight to help the State integrate the WVCHIP member population with the State's Medicaid population to the MHT managed care program by January 1, 2021.
    - *Out of Pocket Maximum (05/2021 to present)*
- **West Virginia Department of Health and Human Resources (DHHR).**

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

training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

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

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

Presentations

Facilitator, "Workshop: Outcomes Based Certification", Medicaid Enterprise Systems Conference (MESC), Boston, MA, August 2021.

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

Podcast, "Medicaid and Children's Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools", 11/2020.

Podcast, "Resumption of Normal Operations: PHE Considerations for States", 09/2020.

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

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

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

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

Meghann Slaven

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	Bachelor of Science in Journalism, Ohio University
	Bachelor of Fine Arts in Performance & Choreography, Ohio University

Overview

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

Experience

BerryDunn (10/2017 to present)

- **West Virginia Department of Health and Human Resources (DHHR)** – *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 to present).*
  As a deputy project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, proposal evaluation processes, and solution implementation activities. Meghann is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Meghann assisted the project team in developing a Data Governance Roadmap.

- **West Virginia Bureau for Medical Services (BMS)**

  o *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 to present).*
  As project lead, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, quality, and is a primary point of contact for project constraints that require escalation. West

Virginia was selected by the Centers for Medicare & Medicaid Services (CMS) and MITRE as a pilot state to test the Outcomes-Based Planning (OBP) process. Meghann led this key initiative for West Virginia by supporting the facilitation of the OBP Pilot, including monthly workgroup meeting facilitation, assessment of the current MES environment, identification of challenges and opportunities, and development of MES goals, outcomes, and metrics. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives.

o   *West Virginia Managed Care Organization (MCO) Encounter Data Quality (EDQ) Assistance Project (09/2020 to 02/2021).*
As a business analyst, Meghann provided guidance and assistance to the project management team with research developing deliverable templates and content, including a Best Practices Research Summary and Data Strategy Roadmap.

o   *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance (08/2020 to 04/2021).*
As a business analyst, Meghann provided guidance and assistance to the project management team to update the West Virginia's MITA 2018 Health Information Technology (HIT) Companion Guide Report.

o   *Enterprise Program Management Office (EPMO) Project (07/2019 to present).*
As a business analyst, Meghann assists West Virginia in developing and updating its annual HIT and HIE APD, to help the client gain over $9 million in federal funding for HIT activities and initiatives.

o   *Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 to 09/2019).*
Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to West Virginia in an effort to assist with the integration of data sources, systems, and databases within BMS. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of project deliverables. As project coordinator Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed Visio process flows to document client data sharing practices.

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

- Puerto Rico Medicaid Program (PRMP)
  - o *Puerto Rico Medicaid Management Information System (PRMMIS) Project (11/2020 to 12/2020).*
    As a subject matter expert (SME), Meghann provided guidance and assistance to the project management team to update PRMP's MMIS Advance Planning Document (APD) and corresponding federal funding documentation.

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

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

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

- **Assistant Director of Admissions (08/2008 to 03/2011).** Meghann assisted the Admissions Director in development of enrollment plan, developed geographical recruitment plan for admissions representatives, and trained and managed admissions representatives.

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

Clay Center for the Arts and Sciences (08/2005 to 09/2006). As a group reservations coordinator, Meghann scheduled group visits to Avampato Discovery Museum, Clay Center, and

West Virginia Symphony Orchestra. She was responsible for maintaining and analyzing the database regarding group attendance, and assisted with museum programs and special events.

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

Susan Chugha

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

Overview

Susan has over 10 years of administrative management experience, as well as five years' experience in consulting work. She has excellent organizational skills, experience with research and project coordination, and experience with various scheduling programs.

Relevant Experience

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

- **West Virginia BMS.**

  - *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).* As project manager for phase 3 of the SUD waiver initiative, Susan is responsible for providing oversight to the project team. She is responsible for the day-to-day activities, meeting facilitation, monitoring progress against the agreed-upon project summary and schedule, as well as deliverable review. She performs research on SUD services, CMS requirements, and State policies and procedures to support the waiver activities. Before becoming the project manager, Susan was project coordinator for phases 1 and 2. As project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, research, and business analysis. During phase 2 she managed the development of a peer recovery support specialist webinar and has been involved in policy development.

  - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to present).*
    Susan moved into the project manager role in November 2019 for the MITA 3.0 2018 SS-A maintenance and annual update project. She is responsible for providing oversight to the project team, managing budgets and project deliverables, as well as working closely with the client to help ensure requirements and expectations are fully met. Prior to this role, Susan was the

lead project coordinator for daily project activities, responsible for project communication, quality checks on files and templates, and meeting management. She also assisted with the maintenance and management of the MMP site which included uploading files, updating relevant information as needed, ensuring that the appropriate individuals are granted access, and contributing to the design of dashboards and all other aspects.

o *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to 12/2018).*
As the project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.

o *ICD-10 Transition Planning and Implementation (10/2015 to 02/2016).*
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

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

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

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

- **Project Specialist – Assistant Vice President**

    o Lead Project Specialist for semi-annual Global Distribution Summits.

    o Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.

    o Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~$1.5 trillion dollars in assets under management represented in our client base at this event.

    o Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the U.S. and assisted with follow-up after each program to track our successes and determine where improvement was needed.

- o Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.

- o Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.

- o Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.

- **Communications Coordinator/Project Manager – Officer**

  - o Created quarterly newsletters and other publications that were distributed internally.

  - o Coordinated the Mutual Funds, Sales, and Operations (MFSO) program for wholesalers.

  - o Managed the valued-add and continuing education curriculums that were available to field wholesalers.

  - o 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, book travel arrangements, process expense reports, minute taking and distribution, coordination of meetings and conferences for office professionals. In addition, she created PowerPoint presentations, monthly reports, territory maps, emergency contact lists, etc.; organized and scheduled internal trainings and maintained relationships with business partners; and maintained office and office equipment that supported over 50 associates.

Charles T. (Tom) Hunter, ITIL

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 07/2011)
Years of Experience Relevant to Proposed Role:	30+ years
Certifications and Education:	ITIL Foundation Certification Microsoft SharePoint 2010 Tom has attended Morris Harvey College and West Virginia University, earning 80 credit hours in Pascal programming language, C++ programming language, and accounting. In addition, he has taken various IBM® classes on telecommunications, programming, and NT administration and taken technical classes through Computer Associates and New Horizons Computer Learning Center.

Overview

Tom is a senior consultant in BerryDunn's Government Consulting Group. He has 30+ years of experience as a DBA, system designer, computer programmer, analyst, project manager, and trainer in the healthcare and natural gas industries. Tom has strong analytical skills combined with experience in object-oriented programming techniques, database design, and legacy programming languages. He is a team leader competent in complete project cycles, testing, final implementation, and documentation with excellent communication skills.

Relevant Experience

BerryDunn (07/2011 to present). Tom serves as a consultant as part of BerryDunn's Medicaid consulting practice area.

- **West Virginia BMS.**

  o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2016 to present).*
  Tom joined the MITA project in June 2016 as a business analyst providing database experience and expertise to complete an Access database to store and report business process capability maturity levels for the 2016 SS-A. The project involved restructuring and importing several Excel spreadsheets from the 2014 assessment into the database along with validating the results of the imports. "Scorecard" reports to submit the data to CMS were designed and created along with data entry forms to also record the information through a graphical user interface.

o *Project Management of MMIS Procurement, DDI, and Certification (05/2014 to 05/2016).*
Tom joined the MMIS project in May 2014 as a subject matter expert for the provider enrollment sub-system leading the deliverable review effort of several provider documents for the new system. He also was the lead UAT tester of the Provider's Online Portal for Provider Enrollment, providing valuable input to the vendor for defect resolution and enhancements.

o *Provider Enrollment (PEA) Project (08/2013 to 05/2014).*
Tom was the lead project manager for this project assisting BMS with weekly status meeting facilitation and reporting. He was the lead UAT tester for BerryDunn, coordinating BMS resources to provide accurate and prompt testing results on the PEA project. In addition, Tom has critiqued several desk level procedures from BMS' fiscal agent and offered many updates resulting in improvements to their documentation.

o *5010 Refresh Project (10/2011 to 08/2013).*
Tom participated on the Medicaid 5010 Refresh Project as a lead tester and support analyst assisting BMS in several ways. He wrote user documentation for the BMS testers, created Excel spreadsheets and SharePoint lists to facilitate defect reporting, and managed the day-to-day UAT efforts at the fiscal agent's office for BMS. He participated in daily triage meetings during UAT and provided valuable assistance with his background in medical claims billing and processing.

o *Data Warehouse / Decision Support System (DW/DSS) Project Management (07/2011 to 10/2011).*
Tom worked on the DW/DSS project after joining BerryDunn in July 2011. His initial duties were meeting facilitation and deliverable reviews. His background provided much-needed expertise with the numerous technical documents that were presented as part of the early stages of the project.

R.L. Laughlin & Co., Inc. (12/2002 to 07/2011). As an IT DBA, analyst, and programmer for this West Virginia-based natural gas measurement and field services company, Tom provided programming, database design/administration, and system design functions on a variety of platforms and programming languages. He administered MS SQL databases, including transactional replication of production database to offsite backup server; wrote, tested, and debugged ad hoc queries, user-defined functions, and stored procedures; created and maintained tables, including indexes and triggers; developed program specifications and documentation; developed and maintained operational procedures. He has written programs to provide custom file formats and reports; migrated software to a client-server platform; provided new software development and support; and managed teams of software development subcontractors.

Charleston Area Medical Center (CAMC) (09/1992 to 12/2002). As director of IT from 1992 to 2002, Tom managed the 200+ server data center at CAMC, which had 15 staff and operated 24/7. He also managed the Network and PBX departments (staff of 25) and help desk (staff of 12) during various periods. He participated in IT project management at the department level, attended Six Sigma training sessions, and facilitated management development classes. He was a member of a focus group comprised of hospital managers/employees, physicians, and community members tasked with creating an HMO chartered by CAMC, which became Carelink.

Strategic Ventures, Inc. (SVI) (08/1987 to 09/1992). As Director of Information Technology, Tom planned and implemented the consolidation of the SVI data center into the CAMC's data center; managed a medical billing department of 15 employees and an IT staff of four, providing IT services to seven corporate entities. In addition, he migrated an IBM® System 36 computer to an IBM® AS/400 system; wrote and maintained RPG programs on AS/400; and planned and implemented the installation of an HP computer to provide computer services to Carelink HMO.

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

Overview

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

She participates in state and national healthcare transformation initiatives including health reform, Health Level 7 (HL7), MITA, National Health Information Network (NHIN), Electronic Health Records Adoption (EHR), and HIE projects and workgroups.

Relevant Experience

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

- Business analyst / subject matter expert (SME) supporting the certification team for the West Virginia DHHR Data Visioning & Warehouse RFP Development and Procurement Assistance Project (09/2018 to present)

- Business analyst/SME supporting the deliverables review team for the West Virginia Project Management Services on the West Virginia Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 to present)

- MITA SME/analyst for West Virginia's MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 to present)

- Policy analyst and Affordable Care Act SME for West Virginia Bureau for Medical Services State of West Virginia Medicaid Enterprise Gap Analysis and Project Management Services (GAPMS) Project (11/2016 to 03/2018)

- Business analyst/SME supporting the AHCCCS Testing Experience and Functional Tools in Community-Based Long Term Services and Supports (TEFT) Grant PHR Assessment project (7/2014 to 09/2014)

- Business analyst for the development of West Virginia's State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 to 10/2010)

- Business analyst for the development of Massachusetts State Medicaid Health IT Plan and EHR Incentive Payment Program (10/2010 to 01/2011)

- Lead policy analyst for the West Virginia DHHR Affordable Care Act Compliance and Implementation Project (05/2010 to 12/2013)

- SME providing eLearning content development for the West Virginia ePrescribing training program for physicians (06/2009 to 12/2009)

In addition, she has served as lead policy analyst for Alabama's Medicaid Managed Care External Quality Review (EQR) project; MITA SME for AHCCCS and State of New Mexico Human Services Department (HSD) MITA 3.0 State Self-Assessment (SS-A); State of New Mexico HSD National Human Services Interoperability Architecture (NHSIA) assessment; policy manager as part of an IV&V team for Arizona's Health Insurance Exchange (HIX) implementation; and policy analyst for business intelligence projects in various states, including Arizona, Utah, New Mexico, Illinois, New Hampshire, Florida, Arkansas, and Texas.

Consulting projects include:

- Lead analyst for New Mexico MMIS Replacement Project – Medical Assistance Division MITA SS-A and Child Support Enforcement NHSIA assessment prepared for the State of New Mexico HSD.
- Policy manager for Arizona HIX IV&V.
- MITA SME/business analyst for AHCCCS MITA 2.0 and 3.0 SS-A.
- Policy analyst for Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application.
- Lead policy analyst for West Virginia BMS ACA Compliance and Implementation Project.
- Lead policy analyst for Alabama Medicaid Managed Care EQR project.

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

- Business analyst for the AHCCCS MITA Analysis Project. Performed business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, developed As-Is and To-Be Assessments, data collection surveys, documentation review, planned and facilitated validation sessions, performed quantitative and qualitative gap analysis and documentation, and developed solutions transition and sequencing plan MITA strategic roadmap.
- Lead business analyst for AHCCCS Fee-for-Service Management Division MITA Assessment. Managed MITA business analysis team.
- Lead business analyst for AHCCCS and Department of Economic Security to initiate Phase I of the State of Arizona Technology Interface Project System.
- Lead business analyst managing functional requirements engineering for Maricopa County Integrated Health Systems, Third-Party Administrator Transition, and System Implementation project managed requirements development team.
- Policy consultant/business AHCCCS and Hawaii Department of Human Services (DHS), member of HIPAA privacy policy compliance team assessments.
- Lead business analyst for Indiana MITA analysis project. Performed business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, developed As-Is and To-Be Assessments, web enabled documentation request surveys using Survey Monkey, planned and facilitated validation sessions and documentation review, developed solutions transition and sequencing plan MITA strategic roadmap.
- Pharmacy/Provider relations SME for Mississippi Data Warehouse/Decision Support System Design, Development, and Implementation project.

- Senior policy analyst for South Dakota HIPAA Security Policy and Procedures compliance project. Performed policy and procedures gap analysis of existing Department and State Information Technology authority documentation.

- Business analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the Centers for Medicare & Medicaid Services (CMS) MITA Framework. This was among the first MITA assessments performed.

- Policy analyst providing support to the CMS MITA Initiative Team. Provided policy guidance for the development of MITA Business Model and MITA Assessment tools. Participated in MITA Framework development workgroups and MITA Medicaid Management Information System (MMIS) reshaping efforts, including HL7 Financial Management workgroup. Familiar with most aspects of the framework and technical specifications.

- Business analyst/SME for Washington State Medicaid MMIS procurement project.

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

- Managing task force activities and studies, including Medicaid cost containment, prescription drug access, provider retention issues, workforce shortages, health professional regulation, and rural and immigrant access to healthcare

- Managing population survey and data analysis projects that resulted in significant legislative changes

- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues, managed care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues

- Analyzing and interpreting state and federal laws and regulations

- Analyzing healthcare legislation and providing technical support to the state legislature, governor, and the New Mexico delegation to the U.S. Congress

- Developing data collection tools and survey instruments

- Conducting comparative health data analysis

- Responding to legislative requests and mandates

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

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

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

Marvin (Ed) Crawford

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Regents Bachelor of Arts, West Virginia State University (*in progress*) Certified HIPAA Professional, ECFirst Certified Security Compliance Specialist, ECFirst

Overview

Ed brings demonstrated experience in all aspects of Health Information Technology; security, policy, research, analysis and interpretation of laws, rules and regulations. His experience includes project management services in support of both operations and DDI for the WV Medicaid Management Information Systems (MMIS) and Eligibility & Enrollment (E&E) projects.

Experience

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

- **West Virginia Department of Health and Human Resources (DHHR)** – *People's Access to Help (PATH) DDI Project Management (04/2019 to present).*
  Ed coordinates numerous reviews for 92 separate deliverables, managing intake of all documents from contract vendor, disseminating to internal reviewers, and compiling comments for posting back to Optum. He also administers accurate documentation and tracking of all deliverables to and from the vendor. He is responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation industry best practice processes and methodologies for consistency and traceability.

- **West Virginia Bureau for Medical Services (BMS)** – *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (04/2019 to present).*
  Ed maintains an Access database for the MITA project used for gathering and compiling data during the annual State Self-Assessment, ensuring that BMS consistently maintains compliance with its federal partners.

West Virginia Bureau for Medical Services (06/2010 to 04/2019). As the HIPAA security officer, Ed provided management and operational support services to the State Medicaid Agency which included, but was not limited to, Information Technology security controls, system performance monitoring, project management, report administration and stakeholder engagement. Particular areas of focus included research, analysis and management of comprehensive IT security policies and procedures for the Medicaid Enterprise (MMIS, DW/DSS

and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

West Virginia Office of Technology (02/2009 to 06/2010). Ed served as an IT client technician, providing project management, coordination, reporting and operational support services for new, and existing, IT implementation activities for the WV Executive Domain. He provided senior level technical support services for designated Agencies within the Executive Branch.

West Virginia Office of the Insurance Commissioner (09/2005 to 02/2009). As primary HIPAA Security Officer, Ed was responsible for the creation, promulgation, implementation, management and reporting of projects, initiatives, policies and procedures related to accessing the WCIS (Workers Compensation Insurance System) and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Workers Compensation Commission (12/1999 to 09/2005). Ed was the primary information security officer responsible for the creation, promulgation and implementation and management of the processes, policies and procedures related to the access to WCIS (Workers Compensation Insurance System) and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Division of Corrections (12/1995 to 12/1999). As Communications Officer, Ed was also the primary designated Information Security Officer responsible for the creation, promulgation and implementation and management of the processes, policies and procedures for IT environment at the Mount Olive Correctional Complex.

Cynthia Taylor, LPN, CHP, CHS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert (SME)
Years of Experience Relevant to Proposed Role:	30 years
Certifications and Education:	Licensed Practical Nurse, Trenholm State Technical College
	Alabama Board of Nursing License
	Certification in Healthcare Privacy
	Certification in Healthcare Security

Overview

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

Relevant Experience

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

- *ICD-10 Implementation (03/2013 to 02/2016):* Cynthia worked as a consultant on the ICD-10 Implementation Project and provides support to the project manager as a SME on healthcare policy. She assisted in the remediation of the current BMS Provider Policy Manual for ICD-10 implementation, facilitates Policy Workgroup Sessions with program areas, and assists in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.

- *Adult Quality Measures Grant Project (03/2013 to 12/2017):* Cynthia supported the collection and reporting of the Adult Core Quality Measures and the implementation of the BMS Quality Unit. She assisted with the development of training materials; coordinated training workshops, provided training to staff and to providers; served as a resource for providers, stakeholders, and partners requesting assistance; provided expertise in the development of trainings that focus on educating providers in collecting and reporting on the Adult Core Measures, as well as in development of staff training that included the use of tools for collecting and analyzing the data from claims, surveys, medical records, and encounter records; and worked with the data manager and data analyst to help ensure best practices related to data collection and analysis.

- *Affordable Care Act (ACA) Project (12/2012 to 08/2013):* For the ACA project, Cynthia functioned as a consultant and participated in writing impact assessments of the ACA provisions on WV Medicaid, including policy and procedure impacts, system impacts, MITA business process impacts, and weekly What's New on ACA.

Alabama Medicaid Agency (07/2002 to 12/2011). As a senior healthcare compliance consultant for a consulting firm, Cynthia worked on the following projects for the Alabama Medicaid Agency:

- *MMIS Coordinator's Office (06/2006 to 12/2011):* Cynthia provided business analysis and project support for the MMIS implementation and certification; assisted with the development of an APD and Invitation to Bid for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a recipient web portal, provider web portal for enrollment and re-enrollment, National Correct Coding Initiative (NCCI) edits, and 5010 compliance; and assisted with the development of APDs for NCCI and ICD-10.

- *IV&V and Technical Assistance of the FA MMIS Implementation (04/2006 to 10/2008):* Cynthia provided project management support; monitored and tracked correspondence between the agency, FA, and IV&V vendor; reviewed and compiled agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the project manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the agency and FA delivery schedule.

- *Managed Care External Quality Review (EQR) (06/2006 to 05/2011):* Cynthia served as project lead for the EQR of the Maternity Care Program and Partnership Hospital Program. Her responsibilities included scheduling, conducting, and documenting assessments of the primary contractors; generating reports to CMS; and providing recommendations to the agency to help ensure compliance with the Managed Care federal regulations.

- *HIPAA Security Implementation (07/2004 to 12/2004):* Cynthia scheduled Privacy/Security Advisory Group (PSAG) meetings; scheduled, conducted, and documented security risk assessments; produced and distributed HIPAA Security Manuals to senior management; produced and distributed the Security Officer's Manual to the Security Officer; and assisted Agency General Counsel in execution of HIPAA Security Business Associate Agreements.

- *HIPAA Privacy Implementation (07/2002 to 06/2004):* Cynthia worked with the agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing agency Notice of Privacy Practices; developing agency privacy policies, procedures, and

forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

Baptist Health System (2002). As the senior healthcare data analyst, Cynthia was responsible for maintaining the database used for timely submissions to JCAHO for the four hospitals that were part of the Baptist Health System.

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

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

b) BerryDunn

Dawn Webb, BSHL, CPC, COC

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

Overview

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

Relevant Experience

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

- **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.

- o *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).

- o *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.

- o *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.

Garrnet 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

Julie DuPuis, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Arts in General University Studies, Western Michigan University
	Master of Public Administration with concentration in Health Care Administration, Western Michigan University
	Fundamentals in Project Management (in progress)

Overview

Julie is an outcome-driven and analytical leader with 30 years of state government experience providing comprehensive health coverage to a broad range of individuals, leading and executing Medicaid and related programs, and improving various reporting processes. She has a strong foundation in managed care health delivery systems, including network assessments, financial oversight, compliance, dispute resolution, rate setting, program integrity controls, and automated systems development. Julie is adept at migrating MMIS systems from Legacy to an Enterprise environment and has developed remarkable efficiency in calculating Medicaid Managed Care Accruals as well as schedules for the Health Insurance Provider Fee for Medicaid Health Plans.

Experience

BerryDunn (07/2022 to present).

- **West Virginia Department of Health and Human Resources** – *Medicaid Enterprise System and Enterprise Data Solution projects (07/2022 to present).*
  Julie serves the Medicaid Enterprise System and Enterprise Data Solution projects as a subject matter expert supporting data profiling, testing, and requirements gathering support.

Michigan State University (12/2016 to 07/2022). Julie served as data resource analyst and Medicaid specialist to help ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and evaluation activities, as well as Medicaid-affiliated health programs, from start to finish. She cultivated collaborative relationships with program officials, demonstrated exceptional programmatic expertise to spark and initiate new projects and topics important to Medicaid officials, and worked to ensure effective and smooth communication among Michigan's Medicaid programs, health care organizations, and MSU researchers. She acquired and analyzed Medicaid data from the Michigan Department of Health and Human Services, Health Services Data warehouse, CHAMPS, Michigan's MMIS system, and other related systems. She was responsible for structuring data flows, documentation and

instruction relating to Medicaid claims, and creating data pulls relating to Early Hearing Detection and Intervention. This project involved multiple systems assimilating data from each separate data warehouse subsystem. She provided high-level assistance to MSU research faculty and staff in planning and carrying out health service research, including resource identification, data management, structured data pulls, and analysis. Julie contributed to proposal/manuscript development with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audience in various presentations.

Michigan Department of Health and Human Services (09/2012 to 12/2016). Julie served as section manager for the Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section. She delivered exceptional services to department executives, Medicaid Managed Care Plan organizations, and interested stakeholders, while leading and inspiring a multi-skilled team. She delegated tasks to personnel based upon expertise and recommended best approaches to health plan rate setting and financial analysis for Medicaid and related health care programs; defined and enforced SOPs related to budget change concepts and proposals, and bill analysis; and monitored state budget development to accomplish set financial goals. Julie led stakeholder engagement meetings and maintained and enhanced extensive collaboration with internal and external entities. She consulted and coordinated with federal and state agencies, health plans, provider, and stakeholders, county health departments and health professional associations, and initiated the use of Encounter Data for Explanation of Benefits relating to Healthy Michigan members. Julie implemented the algorithm for calculating member premiums for those over 135% FPL. She interacted with the actuary and other consultants to define rates for Medicaid health plans as well as for other special projects, and crafted appealing and interactive presentations for the 13 Medicaid Health Plans, stakeholders, advocacy groups, and upper management that covered a multitude of topics, such as data findings, payment and encounter data system issues, and rates.

Jim Strasenburgh

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Bachelor of Arts in Philosophy, St. Lawrence University

Overview

Jim is a skilled senior consultant with BerryDunn's Consulting Team. He has over 30 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. Over the past five years, Jim has focused on healthcare systems, working with BerryDunn on several state Medicaid IV&V projects.

Experience

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

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

- **Massachusetts HIX/IES Entities** – *IV&V Services (05/2014 to 09/2019).*
  Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.

- **Maryland Health Benefit Exchange** – *IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).*
  As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional

IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

- **Missouri Department of Social Services** – *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services.*
  Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

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

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

Xerox (05/2008 to 06/2009). As data center infrastructure architect for the Oracle Competency Center, Jim developed enterprise Service Oriented Architecture (SOA) platform using an Oracle SOA stack; assisted in deploying new enterprise provisioning, alarming, and ticketing services; and conducted a company-wide assessment of VMware infrastructure of Europe and North American data centers.

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

Jeff Stoddard

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consulting Manager
Years of Experience Relevant to Proposed Role:	15 Years
Certifications and Education:	Bachelor of Science in Management of Information Systems, University of Vermont Health Leadership Development Program, Daniel Hanley Center for Health Leadership

Overview

Jeff is a proven strategic healthcare technology and analytics leader with dynamic data processes, and system development efforts involving Medicaid, Medicare, and commercial data. He excels in interacting with diverse stakeholders, building consensus, and developing successful working relationships while achieving project objectives. In all his projects, Jeff maintains a keen focus on successfully meeting project goals on time and within budget to help clients achieve operational efficiencies, improve quality of care, and reduce costs.

Experience

BerryDunn (12/2019 to present)

As a data management and strategy manager, Jeff works with state healthcare agencies and nonprofit and commercial healthcare organizations to assist in system, data, and analytic projects to achieve program objectives related to improving healthcare outcomes and reducing costs.

- **West Virginia Bureau for Medical Services (BMS)**

    o *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to present).*
    Jeff provides technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

    o *Data Improvement Project (12/2019 to present).*
    Jeff provides technical leadership and analytic support for the project that assists the state in understanding and addressing data quality and usability issues affecting its Medicaid program.

    o *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
    Jeff provided technical leadership and business analysis support to the Department of Health and Human Resources (DHHR) for the implementation of

the state's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

Onpoint Health Data (08/2013 to 07/2019). As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including systems development, infrastructure, and data security.

- **Data System Development**
  Jeff led a diverse team of more than 10 system developers and contractors responsible for building and maintaining the systems used for ingesting, processing, and warehousing all payer claims data. Under Jeff's leadership, the Onpoint system was enhanced to manage healthcare data for over 50 million members and calculate more than 150 healthcare cost, utilization, and quality measures, including Centers for Medicare and Medicaid Services (CMS), Accountable Care Organization (ACO), and National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS) measures.

- **Analytic Enclave Implementation**
  Jeff was the primary architect and responsible for the successful implementation of the Onpoint Analytic Enclave, a new service offering that enables users to log in to a secure, performant, cloud-based analytic environment where they can directly access and work with all payer claims data using the tools of their choice. Through the Analytic Enclave, users were empowered to generate analytics and reports to inform healthcare policy, measure program efficacy, and report on state healthcare costs and utilization.

- **Development and Implementation of a More Robust Information Security Program**
  Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.

Arcadia Solutions (04/2012 to 07/2013). As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and business intelligence capabilities for a community health network in the State of Washington, building an integrated claims and clinical data warehouse with a user interface to be used for population health management. The project was delivered on schedule and within budget.

Health Dialog (09/2004 to 04/2012). As senior director of Operations for Health Dialog, Jeff led a large team of developers, quality assurance analysts, and business analysts responsible for the acquisition, transformation, and quality of healthcare data from many of the largest health plans in the United States. These data were used to drive the disease management function of the business, which resulted in better management of the highest-risk populations, which in turn lead to better health outcomes and a reduction in health plan costs.

Melinda Trail

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

Overview

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

Relevant Experience

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

- **West Virginia BMS** – *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2018 to present).*
  Melinda supports West Virginia's annual State Self-Assessment project work, serving as a business analyst.

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

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

West Virginia Office of Judges (09/2002 to 07/2007). As an administrative assistant, Melinda was responsible for retrieving electronically imaged documents to verify claim information, image quality, and data completeness. She linked electronically imaged documents to the designated issues that were in litigation, maintained daily logs and reports, and developed

operational procedures and manuals. This position required her to keep informed of the principles and applications of law, evidence, and pleadings as well as state, federal, and local laws.

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

Amie Maynard

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	22 years
Certifications and Education:	Regents Bachelor of Arts, Marshall University
	Associate of Arts in Applied Science computer Technology, Marshall University
	Licensed Practical Nursing Program, Cabell County Career Technology Center
	Lean Six Sigma Green Belt Certification, Amazon.com
	A+ Certification in Computer Upgrade and Repair, CompTIA

Overview

Amie is a coordinator and consultant with a strong background in customer service, communications, and training. She is skilled in communicating with stakeholders across departments, maintaining and organizing resources and schedules, and leading new and veteran staff members through processes.

Experience

BerryDunn (05/2022 to present).

- **West Virginia Bureau for Medicaid Services (BMS)** – *Payment Error Rate Measurement Reporting Year 2023 Review Project (05/2022 to present)*
  Amie provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Amie supports the project by assisting in the creation of multiple project trackers on SharePoint Online.

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

  - *MMIS Fee Schedule and Edit Quality Review Project (05/2022 to present)*
    Amie provides project coordination and is responsible for taking detailed meeting minutes, scheduling meetings, tracking action items, and monitoring project risks and issues.

  - *Public Health Emergency Support Project (05/2022 to present)*
    Amie supports the COVID-19 project by tracking federal waivers and state updates, reviewing updates to the Centers for Medicare & Medicaid Services (CMS) blanket waivers, and creating a biweekly document to assist West Virginia in development of procedural and policy changes required during the public

health emergency.

Marshall University (12/2017 to 10/2021). Amie worked as an administrative associate and travel coordinator to organize university-wide events such as the spring and fall general faculty meetings and coordinate with multiple colleges to prepare related presentation materials. She maintained the Faculty Senate office budget, records, supplies, and equipment, and designed and updated the Faculty Senate website, while maintaining related forms for applications for grant awards and travel. Amie managed and communicated reservations for all Faculty Senate meetings, supervised student employees assigned to the office, and coordinated travel for interview candidates visiting campus, including managing related travel expenses and preparing documentation, and coordinating with hosting departments to prepare settlements for reimbursement.

West Oakland Studio (06/2016 to 12/2017). Amie was the business owner of a small art studio with local artist Annette Boston. She offered guided instruction for people of various skill levels to create original artwork and led instruction, design development, and advertising creation.

Amazon (10/2000 to 06/2016). Amie worked as a customer service (CS) manager to supervise veteran and newly onboarded associates to set expectations for performance and workflow changes. She supported newly onboarded CS managers, explaining processes, setting expectations, and sharing resources; addressed issues as needed; and coordinated with supporting teams to address service level issues and improve internal processes. She supported direct client needs with email, documentation, and coordinating needs. Her job required heavy customer service, documentation, and scheduling.

She also served as an executive customer relations specialist to respond to escalated customer concerns routed from executive assistants to then CEO Jeff Bezos, Legal, Public Relations, Investor Relations, and members of Senior Leadership. She answered inquiries communicated through phone, fax, or email from the Better Business Bureau, Attorneys General Offices, and other agencies, and engaged in regular communication with business teams and other departments throughout the company to address immediate issues and drive process improvements. Amie maintained team queues to respond to customer needs in a timely fashion while serving as a resource to all areas of CS. She managed projects to improve processes in various operational units, and was responsible for heavy documentation and customer service.

Amie also served as CS specialist to compose shared customer-facing messaging, create and deliver training, and support new team members to develop the skills needed to perform duties effectively. She developed reference material, maintained internal web pages, identified trends, and established a process for addressing internally. Additionally, Amie assisted customers through email by providing instruction, replicating customer issues for troubleshooting and offering technical support, or escalating to technical teams when necessary.

Jordan Ramsey

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

Overview

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

Relevant Experience

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

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

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

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

Southeast Missouri State University (2015 to 2017). As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

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

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

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

Other Teaching Experience (2006 to 2010).

- **Lanier Technical College:** As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

- **Hardin County, IL:** Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

- **NOVA Group of Japan:** Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.

Karla Fossett, MFA, Prosci® CCP

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

Overview

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

Relevant Experience

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

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

EZAuctioNet (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.

Carole Ann Guay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator (employed with BerryDunn since 10/2014)
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Currently working towards BS in Accounting, University of Southern Maine

Overview

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

Relevant Experience

BerryDunn (10/2014 to present). Carole Ann serves as a project coordinator for BerryDunn's government consulting group, with additional administrative duties. Selected project work includes:

- **Oregon Enterprise Technology Services (OR ETS)** – *Integrated IT Service Management (ITSM) (03/2018 to present).*
  Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.

- **Colorado Office of the State Auditor** – *IT Evaluation (09/2017 to present).*
  Carole Ann coordinates document request items, status reports, meeting requests, and data management.

- **New Mexico Corrections Department (NMCD)** – *COTS Offender Management System (OMS) Replacement (11/2016 to present).*
  Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN** – *Information Security Program Development (05/2016 to present).*
  For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

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

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

- **Minnesota Health Benefit Exchange (MNsure)** – *Programmatic Audit (10/2015 to present)*.
  BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements.

- **Sacramento Municipal Utility District (SMUD)** – *Information Security Audit (08/2016 to 12/2017)*.
  Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

- **West Virginia Department of Health and Human Resources (DHHR)** – *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)*.
  Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

- **Massachusetts State Ethics Commission** – *CMS Planning and Implementation Services (04/2017 to 06/2017)*.
  Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

- **Washington State Auditor's Office (SAO)** – *Local Government IT Security Audits (11/2014 to 06/2017)*.
  Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

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

Molly Hawkinson

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

Overview

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

Relevant Experience

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

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

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

Emily Hendrickson

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

Overview

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

Relevant Experience

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

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

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

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

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

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

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

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

Jonathan Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff (employed part-time with BerryDunn since 02/2019)
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	BA, English, Bowling Green State University
	Member of Golden Key National Honor Society
	Member of Alpha Lambda Delta Honors Society

Overview

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

Relevant Experience

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

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

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

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

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

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
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	MITA SS-A AU Report	BerryDunn will update a report that is a structured method for documenting and analyzing the AS-IS operations and TO-BE environment of Business, Information, and Technical capabilities of the State Medicaid Enterprise. The SS-A facilitates alignment of the State Medicaid Enterprise to MITA Business, Information, and Technical Architectures, as well as the Seven Standards and Conditions.
5	MITA Roadmap	BerryDunn will produce a report that addresses State goals and objectives, as well as key activities and milestones covering a five-year outlook for proposed Medicaid enterprise system solutions.
6	Scorecards	A tool for the State Medicaid Agency (SMA) to conduct its SS-A. The SS-A scorecards assist with data collection and maturity evaluation.
7	Data Management Strategy (DMS)	BerryDunn will create a document that provides the approach to integrating and organizing data through references to data governance, data standards, data processes and procedures, data integration, and metadata repository.
8	Technical Management Strategy (TMS)	BerryDunn will create a document that describes the technical strategy, services, and systems throughout the West Virginia Medicaid Enterprise (WVME). All of the strategies, services, and systems currently, or soon

Deliverable #	Deliverable Name	Deliverable Description
		to be implemented, are critical elements that support the overall TA.
9	HIT Assessment Report	BerryDunn will produce a report that examines how the State is continuing its MITA efforts to assess and increase HIT maturity.
10	Database files	Database that collects all of the assessment data and generates reports.
11	Tentative – Enterprise-wide MITA support and APD assistance	BerryDunn MITA team members will provide assistance when needed to assist with APD needs.
12	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.

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/ Abbreviation	Definition
APD	Advance Planning Document
AU	Annual Update
AS-IS	Term created by CMS to describe maturity levels of business processes
BA	Business Analyst
BMS	Bureau for Medical Services
Bureau	Bureau for Medical Services
Business Process	A collection of related structured activities (a chain of events) that produce a specific service or product for a particular customer or customers. An activity that begins with a unique trigger event and produces a specific result.
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
CMA	Certified Master Agreement
DAF	Deliverable Acceptance Form
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EDS	Enterprise Data Solution
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
IAPD	Implementation Advance Planning Document
IAPDU	Implementation Advance Planning Document Update
IES	Integrated Eligibility Solution
IT	Information Technology
MES	Medicaid Enterprise System
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
PMP	Project Management Professional
QA	Quality Assurance

Acronym/ Abbreviation	Definition
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
SME	Subject Matter Expert
TO-BE	Term created by CMS to describe maturity levels of business processes the State selects to achieve over a span of 3 to 10 years and may involve a phased approach for completion.