



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

State of West Virginia Delivery Order

Order Date: 09-14-2022

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 BMS2300000013 1	Procurement Folder:	1104816
Document Name:	Medicaid Enterprise Data Solutions (EDS) Phase III Project	Reason for Modification:	
Document Description:	Medicaid Enterprise Data Solutions (EDS) Phase III Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

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

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

Total Order Amount: \$2,047,120.00

Purchasing Division's File Copy

ENTERED

PURCHASING DIVISION AUTHORIZATION

DATE: *Tamara 9/30/2022*
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: *Beverly Tole 9-30-22*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

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

Dates of Service 10/01/2022 - 05/31/2023

Total. \$2,047,120.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$10,320.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-10-01	2023-05-31				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 48 Hours @215 = \$10,320

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$23,760.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-10-01	2023-05-31				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 88 hours @ \$270 = \$23,760

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,464,400.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-10-01	2023-05-31				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Peter Alfey 160 hours @ \$175 = \$28,000
 Ryan Wrisley 1,096 @ \$175 = \$191,800
 Meghann Slaven 974 hours @ \$175 = \$170,450
 Julie DuPuis 1,056 hours @ \$175 = \$184,800
 Jim Stassenburgh 880 hours @ \$175 = \$154,000
 Tanveer Khan 1,290 hours @ \$175 = \$225,750
 Cynthia Taylor 1,160 hours @ \$175 = \$203,000
 Dorothy Ball 605 hours @ \$175 = \$105,875
 Chris Davis 677 hours @ \$175 = \$118,475
 Dawn Webb 160 hours @ \$175 = \$28,000
 Maksat Abamov 310 hours @ \$175 = \$54,250

Total 8,368 hours @ \$175 = \$1,464,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$548,640.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-10-01	2023-05-31				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Shelly Schram 800 hours @ \$80 = \$64,000

Matthew Oatlen 1,264 hours @ \$80 = \$101,120

Sarah Vintorini 1,109 hours @ \$80 = \$88,720

AJ Mong 808 hours @ \$80 = \$64,640

Caitlin Poling 830 @ \$80 = \$66,400

Erbolina Bailey 829 hours @ \$80 = \$66,320

Melinda Trail 829 hours @ \$80 = \$66,320

Jordan Ramsey, Molly Hawkinson, Caitlin Cabral, Janine DiLorenzo, Jonathan Williams, Emily Hendrickson 389 hours @ \$80 = \$31,120

Total 6,858 hours @ \$80 = \$548,640.00



August 23, 2022

To Whom It May Concern:

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

The services outlined in the EDS Project Phase III SOW are in accordance with the terms and conditions of the Certified Master Agreement (CMA) Number HHR21*03 Bureau for Medical Services (BMS) Project Management Services contract between BerryDunn and West Virginia Department of Health and Human Resources (DHHR). As stated in the SOW document, the duration of this work is estimated to be eight months. This work is tentatively scheduled to begin on October 1, 2022, through May 31, 2023.

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

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

Best Regards,

Nicole G. Becnel

Nicole Becnel
Principal
681-313-8905

Maine • New Hampshire • Massachusetts • Connecticut • West Virginia • Arizona

berrydunn.com

Agree

Robert Price



Staffing Plan and Scope of Work for
The West Virginia Department of Health and Human Resources and
Bureau for Medical Services
Medicaid Enterprise Data Solution Implementation and the Centers for
Medicare & Medicaid Services Certification Project Phase III
(EDS Project Phase III)
Prepared for CMA #HHR21*03



Submitted by:

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Submitted on:

August 23, 2022

berrydunn.com



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

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

1.0 Key Information

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

1.1 General

Between October 2017 and October 2019, the State engaged BerryDunn to conduct research, visioning, and procurement activities for a new and modernized Medicaid EDS to replace the existing Data Warehouse/Decision Support System (DW/DSS). The EDS will primarily support BMS-administered programs. In addition, the modernized EDS has the potential to support all DHHR bureaus and offices, inclusive of each respective DHHR program and administrative function. Additionally, DHHR intends for the EDS to supply the State with a greater range of analytical capabilities beyond standard reporting of aggregated data currently contained within the existing DW/DSS. DHHR anticipates meeting the vision for the EDS by integrating external data sources (e.g., immunization, eligibility, and public health records) into the Medicaid DW/DSS and by supplying more advanced analytical tools to detect fraud, waste, and abuse and measure health outcomes. The vision for the EDS is to create and maintain a useful, objective, and comprehensive solution that can be used to promote better care, better health, and lower costs for West Virginians. On March 23, 2021, DHHR announced a contract award to IBM® for design, development, implementation (DDI), and operation of the EDS. The contract start date was April 2, 2021.

In December 2021, IBM® announced the 14-month DDI timeline would exceed 14 months due to changes required to incorporate the National Provider Index (NPI) into the EDS design. Due to



the EDS implementation extending beyond the 14-month timeline, the State requested continued PM services support from BerryDunn as outlined within this SOW.

The objective of Phase III of the EDS Project is to continue PM support for six months post the go-live date of November 14, 2022. In addition, this project's scope includes services to support formal CMS certification and federal reviews. This SOW will support the following activities:

- Continue PM support services throughout the implementation of the EDS
- Continue providing data governance framework support, including facilitating meetings with Executive Data Governance Committee (DGC) chairs and the Data Stewards Team, reviewing memoranda of understanding (MOUs), and helping to ensure the EDS Project is in alignment with DHHR data governance expectations
- Continue providing assistance to the State to support requirements management, vendor deliverable management, vendor and vendor contract management, and testing
- Continue providing support to the State to obtain formal CMS certification and facilitation of the federal review process
- Provide DDI validation support to the State post go-live to help ensure full stability of the EDS

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The cost of services and timeline in this SOW assumes services are scoped to occur across eight months. The level of effort defined within this SOW is a point-in-time estimate that may require updates subsequent to the delivery or re-baseline(s) of the vendor-supplied project schedule.
- Schedule delays that result from the action or inaction of federal, State, and vendor stakeholders may impact the overall project schedule and require change requests in order to help ensure BerryDunn's PM services continue for six months post go-live of the EDS.
- The State leadership team will consist of Shaun Charles, Brandon Lewis, and Sarah Young as the project sponsors.



- The State project lead(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.
- Deliverables will be provided in an agreed-upon format.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State SharePoint site and will be brought to the attention of the project sponsor.
- State staff and relevant stakeholders from bureaus and agencies will make themselves available for pertinent EDS implementation activities. If these individuals or others are not available or do not participate in the sessions, the project schedule, scope, and cost may be impacted.
- This SOW assumes that the State project sponsor(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.
- This SOW assumes prompt review and input from the Department of Purchasing. Any delays in review of contract documents may impact the overall timeline for the work that BerryDunn will complete under this contract.
- The BerryDunn leadership team will consist of Ryan Wrisley and Meghann Slaven as the project leads.
- The level of effort defined within this SOW assumes BerryDunn will not be responsible for the development and/or maintenance of documentation to support the DGC, EDS implementation, and/or EDS maintenance and operations outside those documents detailed within this SOW. In the event that DHHR requests assistance developing and/or maintaining documents outside of those within this SOW, those documents will be subject to review and approval by the DHHR project sponsor and BerryDunn.
- The level of effort defined within this SOW is based upon formal certification of the solution under CMS guidelines for Streamlined Modular Certification (SMC) approach. Deviations from the tasks, deliverables, and/or activities defined within CMS' SMC guidelines may result in changes to this SOW.
- The level of effort defined within this SOW assumes that BerryDunn will not serve as "testers" throughout the life of the project.



- The level of effort specific to Vendor Management and Contract Management Services is limited to the solutions implementation and operations period through the close of this SOW.
- The level of effort defined within this SOW may be impacted by any delay and/or project issue that arises as a result of vendor performance.
- The cost of the services described in this SOW is included in the latest EDS Implementation Advance Planning Document Update (IAPD-U) submitted to the federal partners with an estimated cost of \$2,047,120 (\$1,842,408 federal financial participation [FFP]/\$204,712 State share) for PM services through federal fiscal year (FFY) 2023. Any additional services added to this SOW may require an update to the State's current IAPD-U to allocate additional funds for PM services.
- BerryDunn will support DHHR through a future EDS Advance Planning Document (APD) submission over the course of this SOW. For the purposes of this SOW, BerryDunn assumed the need to update the current EDS IAPD for FFY 2023 and FFY 2024.
- This work will begin upon approval of this SOW and a mutually agreed-upon date. This work is tentatively projected to continue for eight months.



2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the EDS project leads and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <p>No Project Management Office (PMO) deliverables will be supplied in support of Engagement Oversight.</p> <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	Eduardo Daranyi Nicole Becnel Peter Alfrey	280
2.0	<p>Monthly Project Status Reporting</p> <p><i>Service Approach</i></p> <p>BerryDunn will supply monthly project status reports, Commissioner Briefings, and CMS executive steering committee reports to the DHHR project sponsors, and/or the federal partners in support of providing objective reporting on the health of the project.</p> <p>The project status reports are intended to supply</p>	Eduardo Daranyi Peter Alfrey Ryan Wrisley Meghann Slaven Matthew Oatten Jordan Ramsey Molly Hawkinson	96



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>higher-level executive-level reporting on the status of project deliverables and timeline, as well as associated project issues and risks.</p> <p>The project status reports will be developed, reviewed, and finalized during the first two weeks of each calendar month for the life of the project.</p> <p>The monthly Commissioner Briefing, and monthly CMS executive steering committee report, will include overall project status, key project activities, high-level issue/risk updates, and upcoming target milestones.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D01: Commissioner Briefing• D02: Monthly Status Reports <p><i>Completion Criteria</i></p> <p>Monthly Project Status Reporting will be deemed complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	<p>Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson</p>	
3.0	<p>PM Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management services in alignment with Project Management Institute® (PMI®) standards. The list below contains suggested Project Management Book of Knowledge® (PMBOK®) knowledge areas that will serve as the baseline for project management services:</p> <ul style="list-style-type: none">• Communications Management• Risk and Issue Management• Stakeholder Management• Scope Management• Project Integration Management• Quality Management• Cost Management	<p>Peter Alfrey Ryan Wrisley Meghann Slaven Tanveer Khan Chris Davis Matthew Oatten Caitlin Poling Erblina Bailey Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson</p>	2,265



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• Schedule Management <p>Upon project initiation, BerryDunn will document agreed-upon expectations for the management of the project inclusive of:</p> <ul style="list-style-type: none">• Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn and State-owned meetings (as requested)• Management of project logs (action items, risks, issues, and decisions)• Location of project documentation repository in an agreed-upon SharePoint location• Providing additional resources and Subject Matter Experts (SMEs) to support the project's needs <p>BerryDunn will also facilitate weekly meetings with State project sponsor(s) and project leads to discuss project status across each project area. BerryDunn will use this time to make the State aware of project risks, issues, and/or items that might require its attention. The team will also use this time to plan risk and issue mitigation and responses.</p> <p>PM Support will be provided across all tasks throughout the scope of this implementation.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D03 – Meeting Materials and Notes• D04 – Project Logs (action item, risk, issue, and decision logs) <p><i>Completion Criteria</i></p> <p>PM Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
4.0	<p>Data Governance Activities</p> <p><i>Service Approach</i></p> <p>In support of this effort, BerryDunn will continue providing data governance framework support of the DGC and Data Stewards Team, as well as external</p>	Ryan Wrisley Meghann Slaven Jim Strassenburgh Sarah Vintorini	640



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>departments and agencies involved in data management processes in collaboration with DHHR. BerryDunn will continue facilitating meetings with the Executive DGC chairs the Data Stewards Team, support MOU and inter-agency agreement reviews, and help ensure the EDS Project is in alignment with DHHR data governance expectations.</p> <p>BerryDunn will also develop a repository of data governance policies, procedures, and documentation to support key stakeholders and the DGC. BerryDunn will provide support for the implementation of the committee's planned operational goals and objectives.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none">• D05 – Data Governance Repository <p><i>Completion Criteria</i></p> <p>Data Governance Activities will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>	Erblina Bailey	
5.0	<p>Requirements Management and Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide PM services in support of the requirements analysis, system design, development, and implementation phases of the EDS Project.</p> <p>During the requirements analysis, system design, and implementation phases, BerryDunn will work with the State to review the vendor's proposed solution for all requirements included in the Request for Proposals (RFP) (inclusive of proposed gaps). After requirements review, the project team will work with the vendor to refine and validate the solution for each EDS requirement.</p> <p>Throughout the design, testing, and implementation phases of the EDS project, the State and BerryDunn will work with the vendor to clarify and validate the design for each requirement.</p> <p>To help ensure the requirements are representative of</p>	Ryan Wisley Meghann Slaven Sarah Vintorini Julie DuPuis Maksat Abamov AJ Mong	1,789



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>the State and vendor's agreed-upon solution, BerryDunn may assign a track lead for each group of requirements to assist the State through requirements design, development, and implementation. The groups of requirements will be based on the vendor's proposed approach to requirements validation. The track leads would be the State's primary points of contact for each requirement area and would work with BerryDunn and the vendor to define, clarify, and test each requirement's design.</p> <p>BerryDunn will also be responsible for meeting facilitation and/or note-taking (when requested by the State) during discussions in which requirements might be impacted.</p> <p>Although the vendor is responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability matrix (RTM), BerryDunn will be responsible for helping to ensure the RTM reflects the State and vendor's agreed-upon solution.</p> <p><i>Deliverable(s)</i></p> <p>No PMO deliverables will be supplied in support of Requirements Management and Support.</p> <p><i>Completion Criteria</i></p> <p>Requirements Management and Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
6.0	<p>Deliverable Management and Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will utilize our standardized approach to monitoring and providing management oversight for the quality of project deliverables, artifacts, and other work products submitted by the vendor. BerryDunn will work to establish expectations early in the development process when there is still time to adjust course on a deliverable or task without significant impacts to the project schedule. Our approach will</p>	<p>Ryan Wrisley Meghann Slaven Sarah Vintorini Jim Strassenburgh Caitlin Poling</p>	2,760



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>consist of the following elements:</p> <ul style="list-style-type: none">• BerryDunn will be responsible for the facilitation, tracking, and management of vendor- and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location.• BerryDunn will develop, review, and finalize deliverable acceptance criteria with the vendor and State.• BerryDunn will participate in vendor-facilitated draft reviews of contract deliverables.• BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements.• BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables.• BerryDunn will collaboratively resolve comments on vendor-owned deliverables.• BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable. Please refer to Appendix B for more information.• BerryDunn will review vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn will work with the vendor to help ensure all deliverables have approved acceptance criteria that have been validated by the State. BerryDunn will also work with the State and vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also develop comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments. <p>Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each</p>		



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>PMO- and vendor-owned project deliverable and milestone by means of a deliverable acceptance form (DAF).</p> <p>BerryDunn will also work with the EDS vendor to help ensure both BerryDunn and the EDS vendor's deliverable review processes are aligned.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D06 – Deliverable/Milestone Acceptance Forms <p><i>Completion Criteria</i></p> <p>Deliverable Management and Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
7.0	<p>Federal Review and Certification Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall PM services support for required federal reviews and certification. This includes assisting the State with development of the approach, process, and methodologies used to manage the project and create associated deliverables required for federal reviews and certification. DHHR is currently engaged in discussions with CMS relative to the SMC approach for the EDS.</p> <p>BerryDunn will work with the State and the federal partners to identify the documentation needed to assist the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services with scheduling, facilitating, and managing any federal on-site visits or reviews.</p> <p>Key SMC activities and milestones include:</p> <ul style="list-style-type: none">• Define Outcomes Statements• Define Evaluation Criteria and Required Evidence• Define Key Performance Indicators (KPIs)	<p>Chris Davis Tanveer Khan Jim Strassenburgh Shelly Schram Melinda Trill</p>	1,762



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• Certification Readiness Planning• Operational Readiness Review• Pre-Certification KPI Reporting• Certification Request Letter• Certification Review (DHHR anticipates the certification review to occur six months after go-live)• System Acceptance Letter• Post-Certification KPI Quarterly Reporting <p>BerryDunn will provide support services to the State by leveraging and reusing the State's existing functionality and processes to help prevent unnecessary duplication.</p> <p>The services outlined in support of these certification-related services were modeled after SMC guidance from CMS. Any deviation from CMS guidance might impact the project's scope, timeline, and/or budget.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D07 – State-Completed Certification Checklists• D08 – Completed Certification Evidence Packets and Related Artifacts <p><i>Completion Criteria</i></p> <p>Federal Review and Certification Support will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
8.0	<p>Vendor Management and Contract Management Services</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Vendor Management and Contract Management Services support for the EDS project. This includes, but may not be limited to:</p> <ul style="list-style-type: none">• BerryDunn will monitor and evaluate contractor activities including deliverables and	<p>Ryan Wrisley Meghann Slaven Sarah Vintorini AJ Mong</p>	680



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Service Level Agreements (SLAs) against contract terms.</p> <ul style="list-style-type: none">BerryDunn will evaluate the existing EDS vendor to help ensure continued best value of the existing contract.BerryDunn will monitor contractors' internal risk management controls and financial condition.BerryDunn will assist in maintaining effective relationships with vendors. BerryDunn will also assist in defining, communicating, and implementing ways to improve vendor relationships.BerryDunn will also assist the State in collecting and retaining Vendor Performance Scorecard Data. This data will contain performance review records based on the EDS contract's KPIs and SLAs. <p>The Vendor Management and Contract Management Services outlined within this SOW will be limited to the solutions implementation and initial operation.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">D09 – Vendor Performance Scorecard Data <p><i>Completion Criteria</i></p> <p>Vendor Management and Contract Management Services will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
9.0	<p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of an IAPD-U for the EDS to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners. BerryDunn has included a minimum of two APDs within the budget. BerryDunn also included the number of hours associated with the creation of the APD to support</p>	<p>Peter Alfrey Ryan Wrisley Meghann Slaven Matthew Oatten Dawn Webb Chris Davis Jordan Ramsey Molly Hawkinson</p>	315



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	operations in this SOW. <i>Deliverable(s)</i> <ul style="list-style-type: none">D10 – APD(s) <i>Completion Criteria</i> The APD Support phase of the project will be deemed complete upon signature approval of the Project Closeout Summary.	Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	
10.0	Testing Support <i>Service Approach</i> BerryDunn will provide resources to assist DHHR with the System Integration Testing (SIT), User Acceptance Testing (UAT), Pilot Testing (where applicable), and Operational Readiness Testing (ORT) efforts. Assistance during SIT, UAT, and ORT is outlined as follows: <ul style="list-style-type: none">BerryDunn will provide assistance with relevant expertise to assist DHHR with the review of SIT cases and results. BerryDunn will also assist with the monitoring of SIT defects and the impact to overall project health.BerryDunn will assist DHHR with updates to the UAT Plan as needed, as well as UAT test scenarios. This will require close coordination of both the vendor's and State's UAT Plans.BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes as well as issues and defects identified over the course of this testing phase.BerryDunn will assist DHHR with the facilitation and validation of the vendor's services as they relate to ORT. BerryDunn will also be responsible for those services necessary to assist DHHR in validating that it	Tanveer Khan Jim Strassenburgh Cynthia Taylor Dot Ball Julie DuPuis Maksat Abamov AJ Mong	3,348



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>is operationally ready for system go-live.</p> <p>To help ensure the requirements are representative of the agreed-upon solution between the State and vendor, BerryDunn's assigned track leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the vendor to define, clarify, and test each requirement's design.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">D11 – UAT Plan Updates as needed (<i>the UAT Plan was developed and approved in Phase I of the EDS Project</i>) <p><i>Completion Criteria</i></p> <p>The Testing Support phase will be deemed complete upon signature acceptance of the Project Closeout Summary.</p>		
11.0	<p>DDI Validation</p> <p><i>Service Approach</i></p> <p>In Phase I of the EDS Project, the decision was made to continue the legacy solution operations three months post go-live in order to help ensure full stability of the EDS. Based on this decision, BerryDunn will support the State with the transition from the legacy DW/DSS to the EDS.</p> <p>BerryDunn will support the activities to be completed by the vendor during the implementation/cutover from the existing solution to the new solution at go-live, including the three-month parallel testing of the legacy and EDS solutions, defect triaging, and security and privacy safeguard reviews.</p> <p><i>Deliverable(s)</i></p> <p>No PMO deliverables will be supplied in support of DDI Validation.</p> <p><i>Completion Criteria</i></p> <p>This phase of the project will be deemed complete</p>	<p>Ryan Wrisley Meghann Slaven Chris Davis Jim Strassenburgh Tanveer Khan Cynthia Taylor Dot Ball Julie DuPuis Maksat Abamov Caitlin Poling</p>	1,290



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	upon signature approval of the Project Closeout Summary.		
12.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D12 – Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn Project Closeout services will be considered complete when the DHHR project sponsor or his/her designee formally accepts the complete EDS solution from the vendor and signs the Project Closeout Summary.</p>	<p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Peter Alfrey</p> <p>Ryan Wisley</p> <p>Meghann Slaven</p> <p>AJ Mong</p> <p>Jordan Ramsey</p> <p>Molly Hawkinson</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p> <p>Jonathan Williams</p> <p>Emily Hendrickson</p>	137
Total Hours			15,362
Total Not-To-Exceed Cost Estimate			\$2,047,120



3.0 Project Resources and Hours

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

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

Table 2: Project Resources

CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
7	LPM	\$215	Eduardo Daranyi	48	\$10,320
8	EM	\$270	Nicole Becnel	88	\$23,760
4	GPM	\$175	Peter Alfrey	160	\$28,000
10	GPM	\$175	Ryan Wisley	1,096	\$191,800
10	GPM	\$175	Meghann Slaven	974	\$170,450
10	GPM	\$175	Julie DuPuis	1,056	\$184,800
10	GPM	\$175	Jim Strassenburgh	880	\$154,000
10	GPM	\$175	Tanveer Khan	1,290	\$225,750
10	GPM	\$175	Cynthia Taylor	1,160	\$203,000
10	GPM	\$175	Dorothy Ball	605	\$105,875
10	GPM	\$175	Chris Davis	677	\$118,475
10	GPM	\$175	Dawn Webb	160	\$28,000
10	GPM	\$175	Maksat Abamov	310	\$54,250
11	SS	\$80	Shelly Schram	800	\$64,000
11	SS	\$80	Matthew Oatten	1,264	\$101,120



CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
11	SS	\$80	Sarah Vintorini	1,109	\$88,720
11	SS	\$80	AJ Mong	808	\$64,640
11	SS	\$80	Caitlin Poling	830	\$66,400
11	SS	\$80	Erbline Bailey	829	\$66,320
11	SS	\$80	Melinda Trail	829	\$66,320
11	SS	\$80	Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	389	\$31,120
			Total Hours and Total Costs:	15,362	\$2,047,120



4.0 Project Hours and Costs Per Month

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

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	11	6	1,049	872	1,938	\$257,595
Month 2	11	6	1,049	872	1,938	\$257,595
Month 3	11	6	1,009	867	1,893	\$250,195
Month 4	11	6	1,144	907	2,068	\$277,020
Month 5	11	6	1,095	846	1,958	\$263,565
Month 6	11	6	1,068	905	1,990	\$263,560
Month 7	11	6	1,002	797	1,816	\$243,370
Month 8	11	6	952	792	1,761	\$234,220
Total	88	48	8,368	6,858	15,362	\$2,047,120



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8
1.0 Engagement Oversight								
2.0 Monthly Project Status Reporting								
3.0 PM Support								
4.0 Data Governance Activities								
5.0 Requirements Management and Support								
6.0 Deliverable Management and Support								
7.0 Federal Review and Certification Support								
8.0 Vendor Management and Contract Management Services								



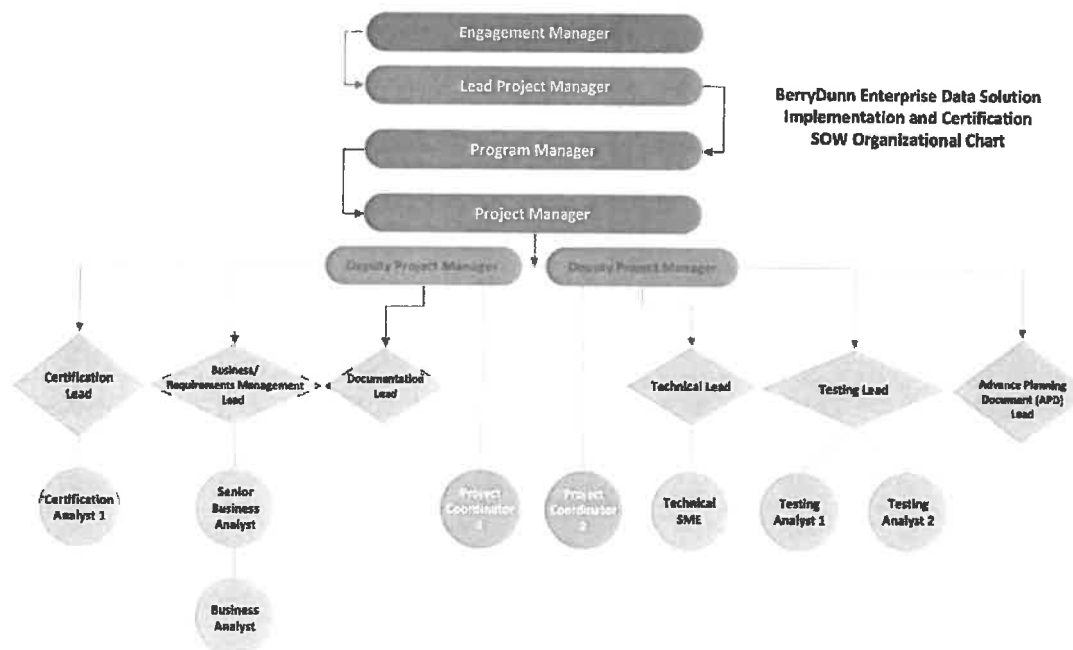
Task	1	2	3	4	5	6	7	8
9.0 APD Support								
10.0 Testing Support								
11.0 DDI Validation								
11.0 Project Closeout								



6.0 Organizational Structure

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

Figure 2: Organizational Structure





BerryDunn Authorized Signature

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

Nicole G. Becnel

Signature

August 23, 2022

Date

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

S. Berwick Jones

Signature

9/12/22

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.

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

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

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

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



Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present).*
Ed has been the Engagement Manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present).*

Over the past eight years Ed has served as the Engagement Manager, the State



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

- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008).*

Ed provided quality assurance services for West Virginia's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA NPI. Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development.

- Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:
 - *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)*
 - *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)*
 - *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*



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



Assistance (04/2017 to 01/2018)

- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*
- **West Virginia Department of Health and Human Resources (DHHR) (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.



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

BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

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

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

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

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

Goold Health Systems (1999 to 2005).

- **Iowa Department of Human Services (06/2004 to 08/2005).** Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project. In this role, Ed coordinated implementation activities; prepared



reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects and operational procedures.

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

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

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

Presentations

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

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

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on www.berrydunn.com 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.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).*

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

- *APD Assistance (07/2010 to present)*

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

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*

Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system,



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

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

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

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

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

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

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



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

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



- federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*

Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
 - *Provider Enrollment (PEA) Project (07/2011 to 12/2012).*

Nicole supported the Bureau with her project, program and portfolio management and subject matter expertise as they implemented health care reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the state.
 - *5010 Refresh Project (10/2011 to 08/2013).*

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.
 - *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.
 - Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
 - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*



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



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

- **New Jersey Division of Medical Assistance and Health Services – MMIS**
Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).
As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.



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

Presentations

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

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



Peter Alfrey, PMP®, Prosci® CCP

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

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



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

Peter served as project manager for the AVS project that supported the State's objective of procuring AVS-related services for the State's Medicaid program. Under Peter's leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.
- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and user acceptance testing (UAT) support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.
- **West Virginia Children's Health Insurance Program (WVCHIP)**
 - *Operational Readiness Review (09/2020 to 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



Ryan Wrisley, MHCDS, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in Business Administration, University of Maine at Orono Master of Health Care Delivery Science, Dartmouth College Project Management Professional, Project Management Institute

Overview

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

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

- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).**

Ryan served as a quality assurance analyst for a project valued at approximately \$200 million dollars. He worked closely with the project manager and the project team who performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the Executive Leadership of the project.

- **West Virginia Offices of the Insurance Commissioner (OIC) – Health Insurance Exchange Planning (06/2011 to 03/2013).**

Ryan served as Project Manager for the development of a Strategic Technology Plan to guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition,



he has provided program and portfolio management of the OIC's various planned initiatives that must take place in order for the HIX to become fully operational and comply with Federal healthcare reform requirements.

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

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

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

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

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

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

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

Ryan served as project manager for a systems planning and RFP development project for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse



Inventory Management System, Liquor Inventory and Distribution System, and supporting back office systems.

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

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

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

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



Meghann Slaven

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
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 manager 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)**
 - *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.

- *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.

- *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.

- *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.

- *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 (IAPD-U); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories,



including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed Visio process flows to document client data sharing practices.

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

- **Puerto Rico Medicaid Program (PRMP)**
 - **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.



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 & Medicaid Specialist to 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 ensured 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, 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. 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 also 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 Strassenburgh

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

Experience

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

- **West Virginia Department of Health and Human Resources (10/2019 to present)**
 - *Enterprise Data Services and Data Source Program (01/2020 to present).*
Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
 - *PATH/IES Program (10/2019 to present).*
Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.
- **Massachusetts HIX/IES Entities – IV&V Services (05/2014 to 09/2019).**
Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.
- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation**



(02/2013 to 04/2014).

As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

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

Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

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

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

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

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



and management of multiple generations of data center technology change, including three data center migrations.



Tanveer Khan, MBA

Proposed Project Role:	General Project manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	35 years
Certifications and Education:	Bachelor of Arts, Mathematics & Computer Science, Macalester College Master of Business Administration, University of Southern California Certificate of completion and assessment ISC (2).org for CISSP training 2004 Certificate of completion as Certified UNIX Instructor, 1994

Overview

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

Experience**BerryDunn (07/2021 to present).**

- **West Virginia DHHR (Department of Health & Human Resources) - EDS**
(Enterprise Data Solution) (07/2021 to present)
Tanveer serves as a named resource as Testing Lead, focused on UAT delivery. His keen eye on both functional and non-functional business and technical requirements for Medicaid Enterprise System platform by focusing on SDLC, requirements from contract and platform functionalities for testing and validation. These business requirements include decomposition for functional solutions and regulatory compliance guidance, as well as nonfunctional surrounding EDS technical stack, security and compliance required for CMS and IRS. He provides SME level support to the program under security and privacy. The result of effective testing is expected to support CMS mandates



and Outcomes-based Certification for the program. Tanveer provides solutions on technical, functional and schedule advice to IBM team on-behalf of PMO to support the program.

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

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

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

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



exchange-to-exchange (E2E) testing for both functional and non-functional (security and performance) testing.

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

Hyundai Capital America (10/2012 to 10/2014). Tanveer was the enterprise solution architect and integration/TQM lead for the Next Generation Business System (NGBS) platform retool. He worked directly with the stakeholders, executives within the business systems, key COTS development teams (local/multi-shores), integration partners, database conversion team, infrastructure division, external TPS, and more. He also mapped business process management requirements to IT strategy & solutions, and led economic impact payments (EIP) validation alongside integration services development. Tanveer mentored teams in Agile software delivery, software quality assurance, TQM and performance engineering for company's multimillion-dollar NGBS enterprise platform with 22 systems with over 1,250+ interfaces transacted internally and externally. He provided 24x7 support of product development, QA, TQM validation in support of go-live objectives, to mitigate any potential issues. Tanveer provided scientific validation of metrics for company service-level agreement (SLA) that lead to production readiness, sizing, dress rehearsal, and go-live enterprise platform objectives for E2E business operations.

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



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

State of Vermont, Department of Health & Human Services (9/2010 to 12/2010). Tanveer was the solution architect that led the effort to develop EA and building of multi-state HIX EDI hub gateway for Medicare/Medicaid payer transactions, coordination of benefits, and EDI integration with mainframe, resulting validation of 2,600+ API across the State & Government EIP systems. Tanveer was the lead in developing multiple streams of ICD-10 conversion, testing & validation in compliance with MITA 2.x framework. He extended over 1000 API to interconnect AS400 to ORACLE ESB via web-services and data services for handling X12 EDI transaction and data warehouse reporting for regional health information organization and State of Vermont Medicare & Medicaid Systems. He also conducted joint application development sessions with BSA and Stakeholders to refine 79 MITA processes into the State Business Processes to develop TA and evaluated existing state posture on IT.

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

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



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- University of Southern California – (1/1987 to 3/1998)



Cynthia Taylor, LPN, CHP, CHS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
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 a consultant specializing in the areas of healthcare compliance, Medicaid, and HIPAA privacy and security. A retired 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.

Experience

BerryDunn (12/2012 to present). Cynthia has worked on several projects for including:

- **West Virginia Bureau for Medical Services**
 - *Medicaid Enterprise Data Solution (EDS) Procurement Assistance, Implementation, and the Centers for Medicare and Medicaid Services (CMS) Certification Project (09/2018 to present)*
As business analyst/subject matter expert, Cynthia assists BMS with management of the scope of EDS requirements throughout the requirements' design, development, and implementation, testing, and training. Previously supported the Data Visioning & Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development for the Procurement Assistance Project.



- *MITA SS-A (08/2012 to present)*
Cynthia serves as MITA Subject Matter Expert/Analyst for West Virginia's MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects.
- *WV Children's Health Insurance Program (WVCHIP) (09/2020 to 03/2021):*
Cynthia served as a business analyst, assisting WVCHIP with transitioning from fee-for-service delivery to managed care model. She assisted in the operational and system readiness reviews and the development of the Operational and Monitoring Plan.
- *ICD-10 Implementation (03/2013 to 04/2016):* Cynthia worked on the ICD-10 Implementation Project and provided support to the Project Manager as a SME on healthcare policy. She assisted in the remediation of the BMS Provider Policy Manual for ICD-10 implementation, facilitated Policy Workgroup Sessions with program areas, and assisted in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.
- *Adult Quality Measures Grant Project (03/2013 to 10/2016)*
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 focused 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 ensure best practices related to data collection and analysis.
- *Affordable Care Act (ACA) Project (12/2012 to 08/2013):* Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.

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

- *MMIS Coordinator's Office (06/2006 to 12/2011):* Cynthia provided business analysis and project support for the MMIS implementation and certification; assisted with the development of an APD and Invitation to Bid for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a Recipient Web Portal, Provider Web Portal for enrollment and re-enrollment, National Correct Coding



Initiative (NCCI) edits, and 5010 compliance; and assisted with the development of APDs for NCCI and ICD-10.

- *IV&V and Technical Assistance of the FA MMIS Implementation (04/2006 to 10/2008):* Cynthia provided project management support; monitored and tracked correspondence between the Agency, FA, and IV&V vendor; reviewed and compiled Agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the Project Manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the Agency and FA delivery schedule.
- *Managed Care External Quality Review (EQR) (06/2006 to 05/2011):* Cynthia served as Project Lead for the EQR of the Maternity Care Program and Partnership Hospital Program (PHP). Her responsibilities included scheduling, conducting, and documenting assessments of the primary contractors; generating reports to CMS; and providing recommendations to the Agency to ensure compliance with the Managed Care federal regulations.
- *HIPAA Security Implementation (07/2004 to 12/2004):* Cynthia scheduled Privacy/Security Advisory Group (PSAG) meetings; scheduled, conducted, and documented security risk assessments; produced and distributed HIPAA Security Manuals to Senior Management; produced and distributed the Security Officer's Manual to the Security Officer; and assisted Agency General Counsel in execution of HIPAA Security Business Associate Agreements.
- *HIPAA Privacy Implementation (07/2002 to 06/2004):* Cynthia worked with the Agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing Agency Notice of Privacy Practices; developing Agency privacy policies, procedures, and forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

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

Children's Health System (1981 to 2000). As the Medical Practice Manager for Children's Health System (formerly Physicians to Children/Central Alabama Children's Specialists),



Cynthia worked closely with nursing and medical staff, including preparation and execution of regulatory guidelines and documentation required for CLIA, OSHA, and JCAHO accreditation.

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



Dorothy Ball, BA

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

Overview

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



healthcare transformation initiatives including health reform, Health Level 7 (HL7), Medicaid Information Technology Architecture (MITA), National Health Information Network (NHIN), Electronic Health Records Adoption (EHR), and Health Information Exchange (HIE) projects and workgroups.

Experience

POGIS Consulting LLC/Dorothy A Ball Consulting (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.

- **BerryDunn (06/2009 to present)**
 - **West Virginia DHHR**
 - *Electronic Data System (EDS) Project (09/2018 to present)*
Dot serves as Business Analyst/Subject Matter Expert currently serving as the Project Training Lead and supporting the Testing and Certification teams. She previously supported the Data Visioning & Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development, and the Certification team for the Procurement Assistance Project.
 - *West Virginia Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 to present)*
Dot serves as Business Analyst / Subject Matter Expert supporting the Deliverables Review team for the West Virginia Project Management Services
 - *MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 to present)*
Dot serves as MITA Subject Matter Expert/Analyst.
 - *Affordable Care Act Compliance and Implementation Project (05/2010 to 12/2013)*
Dot served as Lead Policy Analyst
 - *State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 to 10/2010)*
Dot served as Business Analyst
 - **Puerto Rico Medicaid Program – Puerto Rico Medicaid Management Information Systems (MMIS) Enterprise Objective Monitoring and Control Services (08/2020 to 09/2021)**



Dot served as MITA Subject Matter Expert/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise Key Performance Indicators (KPI) Set/Guide.

- **West Virginia Bureau for Medical Services – Medicaid Enterprise Gap Analysis and Project Management Services (GAPMS) Project (11/2016 to 03/2018)**
Dot served as Policy Analyst and Affordable Care Act subject matter expert.
- **Arizona Health Care Cost Containment System (AHCCCS) – Testing Experience and Functional Tools in Community-Based Long-Term Services and Supports (TEFT) Grant PHR Assessment project (07/2014 to 09/2014)**
Dot served as Business Analyst/Subject Matter Expert
- **Massachusetts State Medicaid - Health IT Plan and EHR Incentive Payment Program (10/2010 to 01/2011).**
Dot served as Business Analyst.

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

Consulting roles and projects include:

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



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

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



Management workgroup. Familiar with most aspects of the framework and technical specifications.

- Business Analyst/Subject Matter Expert for Washington State Medicaid MMIS procurement project.

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

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

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

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

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



Chris Davis, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	15+ years
Certifications and Education:	Associate of Arts in General Studies, Lakeland Community College Bachelor of Arts in Political Science, The Ohio State University Master of Arts in Public Management, Johns Hopkins University Prosci® Certified Change Practitioner Certified Blockchain and Healthcare Professional, Blockchain Council

Overview

Chris is a highly-skilled manager with BerryDunn's Medicaid Practice Group, with a focus on policy, IV&V, and CMS certification. Chris currently serves as a project manager providing IV&V services for an integrated eligibility system. He has provided federal regulatory and certification subject matter expertise for six state Medicaid agencies—Iowa, Missouri, New Hampshire, Ohio, Puerto Rico, and West Virginia. Additionally, he has led MECT, OBC, and SMC pilot efforts for multiple modules including Claims Processing, EVV, EDW, Encounters Processing, Financial Management, Pharmacy Benefits Manager, PI, Provider Management, and Eligibility and Enrollment.

Experience

BerryDunn (08/2017 to present). As a manager in BerryDunn's Medicaid practice, Chris works on the following projects.

- **Ohio Department of Administrative Services (DAS) – Ohio Benefits IV&V Services (04/2021 to present).**
As project manager, Chris leads BerryDunn's IV&V team that is supporting Ohio's integrated eligibility application—Ohio Benefits. BerryDunn's team supports Ohio in implementing an eligibility application that is consumer-centric and easy to navigate,



promotes care coordination, improves administrative efficiencies, and enhances the delivery of healthcare services that are specific to an individual's needs. Chris provides an independent observations and actionable recommendations on program management and decision-making processes and procedures, business, functional, and technical problem management, system integration, and key challenges, risks, and issues to Ohio Benefits Program leadership and stakeholders.

- **Missouri Department of Social Services (DSS) – Medicaid Eligibility Determination and Enrollment System (MEDES) IV&V Services (02/2022 to present).**

Chris serves as engagement manager for the MEDES IV&V project, performing oversight of BerryDunn's project team, reinforcing the highest quality of services, and collaborating with MEDES leadership to help ensure it is fully satisfied with BerryDunn's services and deliverables.

- **Iowa Department of Human Services (DHS) – Medicaid Enterprise Systems Modernization (MEME) Acquisition Support Services (04/2022 to present).**

Chris provides federal regulatory, certification, and outcomes management subject matter expertise on the project. Chris leads the review of certification-related deliverables and leads and participates in material review and research relating to federal regulatory and sub-regulatory guidance.

- **West Virginia Bureau of Medical Services (BMS) – Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (07/2021 to present).**

Chris provides federal regulatory, certification, and outcomes management subject matter expertise on the project. Chris leads the team that is reviewing and determining state-proposed outcomes that are included in the functionality of the EDS. Chris is working with CMS and the vendor in developing evidence for Certification Review.

- **Ohio Department of Medicaid (ODM) – Ohio Medicaid Enterprise System (OMES) IV&V Services (08/2017 to 04/2021).**

ODM is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn is providing IV&V support. Chris serves as a senior consultant on the project, helping to provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole.

- **Puerto Rico PRMP – EOMC Services (07/2019 to 08/2019).**

PRMP requested that BerryDunn provide EOMC services in support of the certification and maintenance and operations for the Puerto Rico Medicaid Management Information



System. Chris provides certification subject matter expertise, including OBC efforts. For this project, Chris served as part of the team that is supporting the MMIS Certification Final Review (R3) for four modules, including Data Warehouse, Encounter Processing, Enterprise, and PI.

- **Missouri DSS – Missouri Medicaid Enterprise (MME) PMO Engagement (05/2018 to 06/2018).**

Chris provided federal certification and IV&V services subject matter expertise on the MMIS Procurement and Replacement Program Project Management Services project. For this project, Chris served as part of the team that is providing project management services for the MO HealthNet Division (MHD) Business Intelligence Solution/Enterprise Data Warehouse Solution and Program Integrity Solution implementations.

- **New Hampshire Department of Health and Human Services (DHHS) – MMIS and Fiscal Agent Services Assessment and Strategy Project (05/2018 to 06/2018).**

Chris provided federal regulatory and certification subject matter expertise on the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, Chris served as part of the team that is assessing the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards, and developing potential MMIS re-procurement options for the State to consider for the future.

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

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



Dawn Webb, BSHL, CPC, COC

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

Overview

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

Experience

BerryDunn (08/2017 to present). Dawn works with state Medicaid agency clients, currently



serving on the project team based in Charleston, West Virginia.

- **West Virginia Bureau for Medical Services (BMS).**
 - *Enterprise Project Management Office (EPMO) (05/2019 to present).*
As quality improvement initiatives program manager, Dawn is providing project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, Payment Error Rate Measurement (PERM), and Third-Party Liability Procurement projects.
 - *TPL Procurement (05/2019 to present)*
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
 - *Advanced Planning Document Assistance (05/2018 to present).*
Dawn currently manages the BerryDunn team for the West Virginia engagement with facilitating the development and approval of APDs for the West Virginia Department of Health and Human Resources' (DHHR's) Medicaid enterprise. This involves coordinating the appropriate staff to gather needed information for the development of APDs, write APD narratives, and establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as annual and as-needed updates to ten established APDs.
 - *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 help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for West Virginia. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to present).*
Dawn served first as project subject matter expert (SME) and then as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and



to provide analysis of cost savings opportunities for BMS.

- **State of Alaska, Division of Legislative Audit (DLA) – National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 to 09/2019)**
Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

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

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

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

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

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

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.

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



Maksat Abamov

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Arts in Education, Institute of World Languages Bachelor of Arts in International Studies, Texas State University Master of Arts in International Studies, Texas State University

Overview

Maksat is a consultant with diverse experience in Information Technology with emphasis on Business Analysis. He has more than 5 years of hands on experience in Healthcare domain and is proficient in translating user requirements into System Specifications, and mapping the process design and workflows for SDLC with documenting and managing business requirements. He has a background in conducting Gap Analysis and facilitating Joint Application Development (JAD) sessions to expedite and streamline the requirement gathering process. Maksat has strong business analysis skills and thorough understanding of different SDLC methodologies like Scrum, Kanban, and Waterfall.

Experience

Caravan Logistics LLC (08/2021 to 07/2022). Maksat served as Chief Financial Officer to rendering operational and programmatic support to the financial team of the company. While supervising the financial unit, he assisted and trained the finance unit, cultivated relationship with stakeholders, assessed the benefits of the contracts, monitored banking activities, and oversaw accounts payable, accounts receivables and business insurance plans of the company. He prepared, analyzed, and presented weekly and monthly financial statements to the Chief Executive Officer, and worked with the Chief Executive Officer in developing financial strategic plan and capital plan. Maksat prepared and supervised the preparation of financial and operating reports from statistical data, assisted human resources with benefits, compensation and other decisions as required, and monitored cash flow on an on-going basis and useful information for managing expenditures. Maksat facilitated meetings and trainings with the finance team and assisted as needed in conducting background check for new employees.

DXC Technology (Gainwell Technology) (05/2017 to 08/2021). Maksat served as Business



Analyst to implement different change orders to make daily activities more efficient and effective for Managed Care Unit. He acted as a technical person for Managed Care Unit in order to assist team members in creating and quality checking SQL queries and data, and analyzed and mapped the state requirements with business requirements. He also analyzed and mapped different data sets from AIM system with the CoreMMIS system, coordinated with the Release Management Team in order to complete the overall release plan, and gathered requirements from business to determine the functionality that should be provided to users. Maksat created business requirement documents as well as system requirement specification, tracked and updated project related issues in JIRA Confluence and prepared report to the Management, and prepared business as well as functional requirement documents, flow diagrams and wireframes which helped technology team to understand exact client needs. He participated and organized requirement gathering sessions with the stakeholders to elicit and analyze requirements. He also validated the different data sets such as enrollment, member data from CoreMMIS system, and conducted different session with business owners from Claim, eligibility, enrollment. Maksat performed BA validation process for all the reports before dispatching to QA environment, created Use case and test case for the UAT/Smoke testing at the end of the testing phase, and worked with the Project Manager on various Project Management activities like keeping track of Project Status, Deadlines, Environment Request, and Compliance Issues.

ANTHEM BCBS (11/2015 to 05/2017). Maksat served as a Business Analyst with Anthem BCBS to implement the Migration of IN Medicaid products from Anthem Legacy WGS and Central Facets platforms to single GBD Facets platform and associated surround systems. He gathered business requirements, reviewed design requirements to meet all the requirements, and elicited functional and non-functional requirements, conducting and facilitating requirement sessions. He worked on Configuration Management, Requirement management and analysis, and actively participated in JAD planning sessions to identify the features and functionalities that should be achieved by the new application where as a team prioritized and determined level of work in line with Agile Scrum and Waterfall methodology. He created Business Requirement Documents, maintained the Traceability Matrix Table to uniquely trace the identified business requirements, and implemented Change Control Process for changes submitted for the BRD once the document was submitted to IT department. He documented the UAT Plan, participated in client discussions of a standard Medicare Advantage plan, and wrote business case scenarios for HIPAA EDI Transactions.



Shelly Schram, CAPM®

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Business Administration in Computer Technology, University of Nebraska at Omaha PMI Certified Associate in Project Management (CAPM®) #3237018 Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II)

Overview

Shelly is a consultant in BerryDunn's Medicaid Practice Area with excellent organizational, problem-solving, and analytical skills. She brings over 10 years of working in the non-profit field providing project, analytical, and administrative skills.

Experience

BerryDunn (01/2019 to present). Shelly serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia Bureau for Medical Services (BMS) on project management initiatives.

- *Enterprise Project Management Office (EPMO) (01/2019 to 10/2021).*
Shelly supports the WV EPMO project with business analysis, project coordination, and management tasks. She worked with the State to maximize productivity and developed State-approved templates used across the engagement. Shelly also works as a subject matter expert (SME) for Advance Planning Document (APD) in development and updates to project narratives and timelines.
- *Third Party Liability Options Analysis and Procurement Assistance Project (04/2019 to 03/2022).*
Shelly serves as the project SME for the TPL project. She focuses on business analysis, project coordination, and management tasks. As a SME, Shelly supports deliverable development, requirements definition, conducts research on federal and state guidance, and performs gap analysis between the Request for Proposal (RFP) and State identified requirements.
- *Payment Error Rate Measurement (PERM) Project Phase II (11/2019 to present).* Shelly serves as a SME for the project. She focuses on identified error life cycles, tracking requests,



data analysis, corrective actions, and Corrective Action Plans (CAPs).

- ***West Virginia People's Access to Help (PATH) (06/2020 to present).***
Shelly supports the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise.
- ***Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2021 to present).***

Shelly provides federal regulatory and certification subject matter expertise on the project. Shelly serves as part of the team that is reviewing and determining state-proposed outcomes that are included in the functionality of the EDS. Shelly is working with CMS and the vendor in developing evidence for Certification Review.

CHI Health Foundation (08/2018 to 01/2019). As the foundation coordinator, Shelly led the coordination and management of projects, campaigns, and events from inception to successful completion. She analyzed gifts to determine appropriate campaigns, funds, and appeals for each processed gift, as well as processed daily gift batches and produced gift receipts and acknowledgement letters. Additional responsibilities included working with the National Office to research local high-profile donors who align with the Foundation's core values, and directing aspects of the fund development database (Raiser's Edge).

Father Flanagan's Boys Home (04/2008 to 08/2018).

- ***Development Project Specialist (01/2016 to 08/2018).*** In this role, Shelly developed, maintained, and monitored detailed project schedules, including timelines, workflow, budgets, personnel, and resources. She researched high-profile donors via online data sources for the executive director and SVP of Development, and coordinated events hosted by National Development. During this time, Shelly also began integration of the Blackbaud Luminate Online system. For this project, she coordinated and took lead on ensuring timely completion. In addition to integration, she began the process of building online campaigns with matching appeals.
- ***Training and Evaluation Data Specialist (05/2013 to 01/2016).*** Shelly managed data files to help ensure accuracy and security. She summarized the results of training and evaluation activities; organized and prepared high-quality reports, graphs, and charts of departmental activities; and constructed and maintained staff evaluation and program fidelity instruments.
- ***Project Support Specialist (12/2011 to 05/2013).*** Shelly assisted with the migration of three databases into one newly created CRM, assisting with accurately mapping data fields and migrating 7.3 million donor records. She researched foundations, organizations, and individuals using several online databases to compile into a constituent report.



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- *Data Analyst (04/2008 to 12/2011).* Shelly evaluated data collected through research, task analysis, business processes, surveys, and workshops. She updated and maintained consumer contact and other data through web-based portals and other databases; updated and maintained lists of materials, contracts, and departmental data in a central location; and utilized online systems to send and track marketing campaigns.



Matthew Oatten

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Communications, Michigan State University

Overview

Matthew is a problem-solving, results-oriented Project Manager with three years of experience managing multiple projects simultaneously while following guidelines, deadlines, project budgets, and providing consistent communication to clients. His strengths include time management, building and maintaining client relationships, and organizational skills. He is dedicated to providing outstanding service to clients through effective interpersonal communication and continuously exceeding expectations, and committed to continually developing and improving professionally.

Experience

Concentra Health Services (01/2019 to 07/2022). Matthew served as Facilities Coordinator to analyze, prioritize, dispatch, resolve, and follow up on 80-120 service requests daily. He delegated workload to a team of 5 project coordinators, designed and maintained a security database for over 500 company locations across 41 states, and collaborated with multiple vendors to resolve time-sensitive, large-scale projects. He researched, evaluated, and bid quotes to proceed with the most cost-effective option while meeting timelines. Matthew established quick mutually beneficial interpersonal relationships with clients and vendors to enhance company productivity, initiated and developed a training manual to assist center managers in effectively working with the Facilities department, and served as interim Facilities Manager in addition to other role to achieve company strategic goal for 3 months of Manager vacancy.

Michigan State University (08/2018 to present). Matthew works as Assistant Cheer & Dance Coach to co-manage operations of a D1 athletic team of 80 co-ed athletes. He assesses athlete performance while providing training to develop skill sets in compliance with NCAA and MSU Athletic Department safety protocols. He facilitates travel sporting, marketing, and community events to engage athletes, donors, and fans nationwide.

Michigan State University (03/2014 to 05/2017). Matthew served as Resident Assistant to



mentor and support a floor of over 90 on-campus residents. He enforced high standards of safety protocol, policy, and accountability while managing interpersonal relationships. He created, facilitated, and assessed programs to support residents' growth and development both academically and socially.



Sarah Vintorini

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Degree in Business Administration/Marketing, West Virginia State University

Overview

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

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

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

- *Medicaid Enterprise System (MES) (3/2021 to present).*

Sarah provides business analyst support and deliverable review and development for MES. Sarah developed the as-is environment deliverable as well as supported the development of the to-be environment deliverable. In addition, she developed graphics and presentations to support the project.

- *Enterprise Data Solution (EDS) (12/2021 to present).*

Sarah provides business analyst support, deliverable review and creation, and monitors the project schedule and action items. Sarah is working on internal and client deliverables to maintain and strengthen the project's reporting processes. Sarah helps to provide strategic direction on the best approach for monitoring vendor performance and strengthening vendor relationships.

- *Electronic Visit Verification (EVV) (11/2019 to present).*

Sarah provides project coordination, deliverable review and creation, and monitors project risks and issues. Sarah helped BMS with the release of their EVV Request for Proposal (RFP), coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of West Virginia's EVV solution.



- *Provider Management Support (PMS) (11/2019 to present).*
Sarah provides project coordination, deliverable development and review, and monitors risks and issues related to all sub-projects within PMS. Sarah is involved in the facilitation of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse. She assisted in developing a comprehensive outreach plan to educate and engage direct care workers and enroll each worker in the State's Medicaid Management Information System (MMIS).
- *Mental Health (MH) Parity Compliance Report (04/2020 to 08/2020).*
Sarah provided project coordination, monitored project risks and issues, and assisted with deliverable development of West Virginia's MH Parity Compliance Report. She coordinated meetings with Managed Care Organizations (MCOs), and helped to gather documentation for accuracy related to Fee-for-Service (FFS) and pharmacy claims.
- *Mountain Health Promise (MHP) Implementation Project Management Support (01/2020 to 06/2020).*
Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.
- **Alaska Division of Health Care Services (HCS) – Medicaid Management Information System (MMIS) Solicitation Consultant Services (09/2020 to present).**
Sarah helped develop and distribute a fact-finding survey to gain input from stakeholders and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Sarah assists with the development of deliverables, project presentations, and monitors project action items.
- **West Virginia Department of Health & Human Services (DHHR) – People's Access to Help (PATH) DDI Project Management (12/2019 to present).**
Sarah provides project coordination, tracks action items, and monitors project risks and issues. Sarah assisted the cross-functional team including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.

West Virginia Governor's Highway Safety Program (2013 to present). Sarah currently serves as a corporate event planner for the West Virginia Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities have included securing over \$150,000 annual sponsorships, a



tradeshow of over 30 vendors from across the country, securing nationally acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event. Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She has utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

KISRA (2012 to 2018). Sarah oversaw all marketing, communications, and special events for one of the state's largest non-profit organizations. Her responsibilities included internal and external communications, sponsor requests, reports to funders, and meetings with funders and stakeholders. In addition, facilitated various program level strategic planning sessions and carried out the implementation of each plan, creative implementation of grant funds, and more. She held numerous committee and program meetings that required planning, organizing, capturing meeting minutes, and timely follow-up after each.

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

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



AJ Mong

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Bachelor of Science, Master of Education, Lancaster Bible College & Graduate School Devereux Safe and Positive Approaches Trainer Certification

Overview

AJ is a flexible and forward-thinking professional with 18 years combined experience in the mental health, education, and customer service fields. He has developed expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership.

Experience**BerryDunn (07/2022 to Present)****West Virginia Department of Health and Human Resources (DHHR) (07/2022 to Present)**

- ***Mountain Health Promise (MHP) Re-procurement project (07/2022 to present)***
AJ serves as project coordinator for the project.
- ***Mountain Health Trust (MHT) Re-procurement project (09/2022 to present)***
AJ serves as project coordinator for the project.

Lingle Avenue Elementary School (08/2021 to 07/2022). AJ served as an Elementary School Counselor to provide character education curriculum to students while serving as the School Assessment Coordinator for statewide standardized testing. He delivered staff training for security compliances and worked with stakeholders to remove barriers to student learning.

Frederick Douglass Elementary School (09/2013 to 06/2020). AJ served as an Elementary School Counselor with the School Leadership Team and Focus School Improvement Team to



take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that would lead to measurable system-wide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

Elizabethtown Area School District (12/2012 to 06/2013). AJ served as Long-Term Substitute for an Elementary School Counselor to provide individual & small group counseling, conducted gifted academic screening, and partnered with other counselors to implement a holiday giving program to provide families with meals during the holiday seasons.

Union School District (02/2012 to 05/2012). AJ served as a Long-Term Substitute for an Elementary School Counselor to conduct classroom guidance lessons and facilitated a peer partnership program for elementary students.

Hershey Entertainment Complex (05/2005 to 08/2013). AJ served as Supervisor to lead over 200 employees, including other supervisors, to help operate and maintain the daily procedures and staffing for over a dozen facilities in the Hersheypark Food and Beverage Department. He provided staff training and evaluation, maintained daily inventory and ordering, and tracked labor to help offset cost deficits. AJ also developed individual inspection manuals for all locations, addressed customer service issues and complaints, and resolved them in a manner consistent with the company's values.



Caitlin Poling

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Associate in Arts Degree, emphasis in English, West Virginia University Parkersburg IJCAPHO Ophthalmic Assistant Certification 08/2017

Overview

Caitlin has extensive knowledge of insurance billing, coding, prior authorizations, step therapies and claims submission requirements for Medicaid, commercial, and numerous MCO plans. She has proficiency with Microsoft office systems such as PowerPoint, Excel, Outlook, and Word. She has heavy documentation and note taking experience. Caitlin has 7 years' experience documenting detailed and concise information both in the insurance and clinical practice settings, including updating appropriate HIPAA compliant scripts, forms, and correspondence. She has the ability to remain focused and organized, even under pressure and in regard to meeting deadlines. She is an exceptional multi-tasker, able to handle multiple phone lines, computer navigation, and discussion simultaneously.

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

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (06/2021 to present).** Caitlin is a project coordinator for the People's Access to Help (PATH) and Enterprise Data Solution (EDS) projects. She has a variety of responsibilities, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

Mountain State Eye Associates (04/2017 to 06/2021). Caitlin was a Certified



Ophthalmic Assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide minor in-office surgical procedures, and prepare patients for cataract surgery. She performed extensive, thorough patient histories. This position involved heavy documentation/note taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure and administering ophthalmic medications to patients.

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

PacificSource Health Plans (09/2015 to 11/2015). As a provider support technician, Caitlin assisted provider support representatives in accurately entering and maintaining all provider data in the PacificSource database, including performing heavy documentation, note taking, and frequent client facing duties. Caitlin investigated issues by obtaining and/or coordinating information from other PacificSource departments or external sources. She maintained provider updates received from returned provider mail, provider OnBase queues, and Provider Network Support e-mail queue daily; recorded, maintain, and changed provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

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

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

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



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

This position included heavy documentation/note taking. She processed premium payment transactions; worked with providers and claims processors to help ensure claims processed correctly according to member benefits for direct pay and dedicated employer group members; and helped identify issues with benefit tools/resources. She appropriately handled or transferred members in need of assistance outside her area or to file complaints and handled general correspondence and internet inquiries in a timely, efficient manner.

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

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

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

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

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



Erbolina Bailey

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Economics, West Virginia State University

Overview

Erbolina is an experienced economist and Human Resources professional with a track record of solving complex strategic and operational HR challenges at corporate level. She has strong business acumen and specializes in project management, onboarding training, HRIS compliance, regulatory compliance, accountability monitoring and change management.

Experience

BerryDunn (04/2022 to Present).

- **West Virginia Department of Health and Human Resources - *People's Access to Help (PATH) and Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Projects***. Erbolina is a project coordinator for the project. She has a variety of responsibilities, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

Stonerise (12/2018 to 04/2022). Erbolina worked as a Corporate HR Coordinator to assist in steering HR regulatory compliance and onboarding programs across the enterprise (corporate division, 17 transitional care centers, and 9 home health agencies) comprised of 3,000+ employees. She led HR in the shift from paper-based documentation to 100% electronic. She was responsible for heavy scheduling, coordinating, and documentation. Erbolina advised leadership on federal/state regulations, assisted in developing company policies and procedure, trained HR representatives, and collaborated closely with them on multi-HR functions driving success of care center. She accelerated time to hire 25% by identifying redundancies and streamlining onboarding processes. Additionally, she introduced and facilitated two academic-practice partnerships between Stonerise and nursing schools.



N3 (01/2018 to 12/2018). Erblina worked as a Customer Success Manager with Microsoft Azure to manage more than 80 client relationships. She facilitated meetings and engaged with client stakeholders to identify and support their business needs by leveraging Azure solutions. Erblina performed assessments and analyses to optimize value realization by engaging partnerships and ensuring progress reporting and delivery of services. She also influenced client strategy and future growth of Microsoft by cultivating client preference for solutions that drove impact for them and establishing Microsoft as a leader through new reference cases.

TQL (06/2017 to 01/2018). Erblina worked as an Account Executive to coordinate third-party transportation services, research transportation costs, and negotiate freight rates on inbound/outbound deliveries for multimillion-dollar companies. She achieved 99% average delivery rate on all assignments with no loss of materials or assets and increased overall profit margins by 20% over a year.



Melinda Trail

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

Experience

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

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

Melinda brings experience with project management, supporting the EDS Procurement Assistance, Implementation, and Certification project with business analysis, project coordination, and project management tasks. She is responsible for overseeing the meeting management duties, capturing detailed meeting notes, tracking action items, and maintaining the information in the data repository to help provide an organized project layout. Melinda also supports the EDS project as a business analyst for the BerryDunn Outcomes-Based Certification (OBC) team through activities such as strategic planning and peer reviewing OBC Worksheets to help ensure the mapping of the OBC evaluation criteria is in scope with the Request for Proposal (RFP) requirements.
- **West Virginia Bureau for Medical Services (BMS)**
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (07/2018 to present).*

Melinda provides experience with project management, supporting the MITA 3.0



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

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

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

- *Substance Use Disorder (SUD) Waiver Initiative Project (04/2020 to present)*

Melinda provides experience with project management supporting the SUD Waiver initiative project as a project coordinator. She is responsible for overseeing the meeting management duties, updating monthly status reports, capturing detailed meeting notes, tracking action items and decisions, and maintaining the information in the data repository resulting in an organized project layout. Melinda



provides data analytic support for the SUD Waiver project by conducting research for deliverable reports. As part of the BerryDunn team, she also assisted BMS to update the Peer Recovery Support Specialist (PRSS) section of the SUD Policy Manual, which included the State certification criteria and allowed for an Ethics and Appeal Board through BMS.

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

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

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

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

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

Melinda provided experience with project management as she supported the Data Visioning and Warehouse Development and Procurement Assistance Project as a business analyst for the BerryDunn Certification team. The Certification team was focused on the strategic planning and procurement related services needed to assist DHHR in the development of an RFP for a DHHR EDS. As part of the Certification team, Melinda assisted the State by facilitating and gathering RFP specifications, and mapping the CMS MECT Checklist to the RFP requirements, requirements traceability, and requirement descriptions. The mapping led to a



development of a Requirement Traceability Matrix (RTM) inventory of over 1,400 specification and 65 mandatory requirements, which were mapped to 8 CMS MECT Checklist, 10 MITA Business Areas, 80 MITA Business Processes, and 3 MITA Architectures, to determine if the RFP requirements were in scope with the certification criteria in the CMS checklist.

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

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

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

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

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



principles and applications of law, evidence, and pleadings as well as state, federal, and local laws.

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



Jordan Ramsey

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

Overview

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

Experience

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

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

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

Pearson Smarthinking Writing Lab (2017). Jordan revised and edited a variety of essays, working under strict deadlines and providing personalized feedback to help students strengthen



their technical writing, creative writing, career writing, and English-as-a-Second Language skills.

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

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

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

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

Other Teaching Experience (2006 to 2010).

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



Molly Hawkinson

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Writer/Editor
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Certificate, Editing, University of Washington Bachelor of Science in Media and Communication, New York University

Overview

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

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.



Caitlin Cabral

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

Overview

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

Experience

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

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

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

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



best represent True Colors' current mission and achievements.

University of Hartford's Department of Communication (09/2018 to 05/2020). Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.



Janine DiLorenzo

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

Overview

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

Experience

BerryDunn (01/2022 to present). Janine is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes.

Breakwater School (08/2019 to 08/2021). Janine worked as a Preschool Teacher to collaborate with co-teachers to write and implement culturally-responsive and developmentally-appropriate curriculum and assessments, emergent to children's individual interests, strengths, and needs. She wrote weekly curricular updates and quarterly developmental reports to relay children's growth and learning, and to foster home-school connections. Janine also led teaching team in developing centralized communication channels and organizational systems for unit explorations, documentation of learning, and family communications.

Community Connections of Brockton (06/2011 to 06/2018).

- **Program Coordinator (06/2014 to 06/2018)**
Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program



operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.

- ***AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 to 08/2013)***
Janine coordinated communications and logistics among five committees in a crosssector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and also wrote copy for website and social media outreach channels.
- ***AmeriCorps*VISTA, Brockton Parents Magazine (06/2011 to 08/2011)***
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000 copy distribution via businesses, schools, municipal buildings, and social service agencies.

Stonehill College (08/2010 to 05/2011). Janine worked as the Student Co-Director of Volunteerism to maintain relationships with over 30 community partners & 600 student volunteers. She designed and led trainings and reflections for the Student Service Leadership team, recruited volunteers, met community partner service needs, arranged logistics, and organized events to promote awareness of local justice issues and service opportunities. Additionally, she tracked volunteerism data for college and national Carnegie reporting.



Jonathan Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Editor
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in English, Bowling Green State University

Overview

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

Experience

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

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

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



Emily Hendrickson

Proposed Project Role:	Project Management Support Services
Role at BerryDunn:	Paraprofessional
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in English Literature and Language, Gordon College Bachelor of Arts in Biblical and Theological Studies, Gordon College

Overview

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

Experience

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

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

Youngclaus & Company (01/2016 to 04/2017). As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and ensured accurate electronic filing of both client and account documents in company database per standard 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.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, the State PMO will develop and deliver a status report to the WV DHHR BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
2	Monthly Status Report	On a monthly basis, the State PMO will develop and deliver a status report to the DHHR Executive Steering Committee. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
3	Meeting Materials and Notes	In support of project-related meetings, BerryDunn will supply meeting facilitation, materials, and notes in all BerryDunn-owned meetings. Assistance with meeting facilitation, materials, and notes outside of meetings that BerryDunn did not schedule will require approval by the DHHR project sponsor and the BerryDunn project manager.
4	Project Logs (action item, risk, issue, and decision logs)	BerryDunn will develop and maintain project action item, risk, issue, and decision logs for the life of the project. The format, location, and approach to maintaining these logs will be further defined within the Project Management Plan.
5	Data Governance Repository	BerryDunn will develop a repository of data governance policies, procedures, and documentation to support key stakeholders and the DGC.
6	Deliverable/Milestone Acceptance Forms	In support of obtaining State approval of finalized deliverables and milestones, BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable and milestone.
7	State-Completed Certification Checklists	BerryDunn will complete the State portion of the Certification Checklists. This includes in-scope/out-of-scope alignment and evidence mapping for SMC.



Deliverable #	Deliverable Name	Deliverable Description
8	Completed Certification Evidence Packets and Related Artifacts	BerryDunn will populate Evidence Packets for CMS certification. Evidence Packets will provide justification for each mapped criterion.
9	Vendor Performance Scorecard Data	BerryDunn will develop Vendor Performance Scorecard Data to identify gaps, as well as to define, communicate, and implement ways to improve relationships with vendors.
10	APD(s)	An IAPD-U will be developed prior to the close of the FFY and will contain information necessary for DHHR to request continued federal buy-in and financial backing. BerryDunn will also assist DHHR in the development of the IAPD-U; however, the State will maintain responsibility for submission of the document.
11 (Phase I and Phase II Project Deliverable)	UAT Plan Updates (as needed)	The UAT Plan was developed in Phase I of the EDS Project. The UAT Plan documents the State's approach to UAT of the EDS, including the approach to tracking UAT outcomes, issues, and defects. Updates to the UAT Plan will be developed during Phase II as needed.
12	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/ Abbreviation	Definition
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Certified Master Agreement
CMS	Centers for Medicare & Medicaid Services
DAF	Deliverable Acceptance Form
DDI	Design, Development, Implementation
DGC	Data Governance Committee
DHHR	Department of Health and Human Resources
DW/DSS	Data Warehouse/Decision Support System
EDS	Enterprise Data Solution
FFP	Federal Financial Participation
FFY	Federal Fiscal Year
IAPD-U	Implementation Advance Planning Document Update
KPI	Key Performance Indicator
MITA	Medicaid Information Technology Architecture
MOU	Memorandum of Understanding
OBC	Outcomes-Based Certification
NPI	National Provider Index
OMIS	Office of Management Information Services
ORT	Operational Readiness Testing
PM	Project Management
PMBOK®	Project Management Book of Knowledge®



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

Bill J. Crouch
Cabinet Secretary

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

Cynthia E. Beane
Commissioner

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

FROM: James Atkins II *JAT*
BMS Procurement Services

DATE: September 13, 2022

RE: PF1104816, CDO BMS23*13

The West Virginia Bureau for Medical Services (BMS) respectfully requests approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker, LLC under PF785940 CMA HHR21*03.

The purpose of this delivery order is for the vendor to assist BMS by providing support for the Medicaid Enterprise Data Solution (EDS) Phase III project. The total not-to-exceed cost is \$2,047,120.00 The service period of this project is 10/01/2022-05/31/2023.

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

Robert Price
Agree



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

Bill J. Crouch
Cabinet Secretary

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

Cynthia E. Beane
Commissioner

DATE: September 13, 2022
TO: DHHR Finance
FROM: James Atkins II *JAI*
BMS Procurement Services
RE: Funding Memo for PF1104816 CDO BMS 23*13

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

BMS anticipates making payments for months 1-7 in SFY23 and month 8 in SFY24.
Contract service period: 10/01/22-05/31/23. Funding allocation table below:

CDO BMS23*13

EDS Phase III Project

10/01/2022-5/31/2023

8 Months

	PR05 SFY23 10/01/22-4/30/23	PRO7 SFY24 5/01/23-5/31/23	Total:
EM	77 Hours @ \$270=\$20,790	11 Hours @ \$270=\$2,970	\$23,760.00
LPM	42 Hours @ \$215=\$9,030	6 Hours @ \$215=\$1,290	\$10,320.00
GPM	7,416 Hours @ \$175=\$1,297,800	952 Hours @ \$175=\$166,600	\$1,464,400.00
SS	6,066 Hours @ \$80=\$485,280	792 Hours @ \$80=\$63,360	\$548,640.00
	1,812,900.00	234,220.00	2,047,120.00

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