



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

State of West Virginia Delivery Order

Order Date: 04-12-2023

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 BMS2300000031 1	Procurement Folder:	1211003
Document Name:	Advanced Planning Document (ADP) Consulting Services	Reason for Modification:	
Document Description:	Advanced Planning Document (ADP) Consulting Services		
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: Lucinda L Carroll Requestor Phone: (304) 352-4235 Requestor Email: lucinda.l.carroll@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: \$1,373,600.00

Purchasing Division's File Copy

ENTERED

PURCHASING DIVISION AUTHORIZATION

DATE: *Tanya* 4/19/2023
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: *Beverly Tolson* 4-19-2023
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Advanced Planning Document (ADP) Consulting Service

Dates of Service: 05/01/2023 - 06/14/2024

Total: \$1,373,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$43,000.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-05-01	2024-06-14				

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Dawn Webb 200 Hours @ \$215 = \$43,000

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$21,600.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-05-01	2024-06-14				

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 80 hours @ \$270 = \$21,600

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,085,000.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-05-01	2024-06-14				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:

General Project Manager: Base Year One

Hourly Rate: \$175.00

Change Order 2. Pricing termed effective 06/14/2023.

Peter Alfrey 200 Hours @ \$175 = \$35,000
Eboney Carter 200 Hours @ \$175 = \$35,000
Susan Chugha 200 Hours @ \$175 = \$35,000
Andrea Clark 120 Hours @ \$175 = \$21,000
Sarah Colburn 200 Hours @ \$175 = \$35,000
Eduardo Daranyi 80 Hours @ \$175 = \$14,000
Amber Davis 200 Hours @ \$175 = \$35,000
Julie DuPuis 200 Hours @ \$175 = \$35,000
Crystal Fox 200 Hours @ \$175 = \$35,000
Sudha Ganapathy 200 Hours @ \$175 = \$35,000
Nora Gilligan 200 Hours @ \$175 = \$35,000
Crystal Gray 200 Hours @ \$175 = \$35,000
Valerie Hamilton 200 Hours @ \$175 = \$35,000
Jason Hargrove 200 Hours @ \$175 = \$35,000
Marnie Hudson 200 Hours @ \$175 = \$35,000
Meghan Luce 200 Hours @ \$175 = \$35,000
Alex Lyubarov 200 Hours @ \$175 = \$35,000
Brody McClellan 200 Hours @ \$175 = \$35,000
Emily McCoy 200 Hours @ \$175 = \$35,000
Hilary Foster Moles 200 Hours @ \$175 = \$35,000
Sarah Ratliff 200 Hours @ \$175 = \$35,000
Lisa Roberts 200 Hours @ \$175 = \$35,000
Tonya Roloson 200 Hours @ \$175 = \$35,000
Shelly Schram 200 Hours @ \$175 = \$35,000
Meghann Slaven 200 Hours @ \$175 = \$35,000
Nicole Spears 200 Hours @ \$175 = \$35,000
Jeff Stoddard 200 Hours @ \$175 = \$35,000
Alex Tannenbaum 200 Hours @ \$175 = \$35,000
Drew Thomas 200 Hours @ \$175 = \$35,000
Liz Vose 200 Hours @ \$175 = \$35,000
Ethan Wiley 200 Hours @ \$175 = \$35,000
Ryan Wisley 200 Hours @ \$175 = \$35,000

Total 6,200 Hours @ 175 = \$1,085,000.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$224,000.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-05-01	2024-06-14				

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

Extended Description:
Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Megan Blount 200 Hours @ \$80 = \$16,000
 Caitlin Cabral 200 Hours @ \$80 = \$16,000
 Janine DeLorenzo 200 Hours @ \$80 = \$16,000
 Alex Glowacky 200 Hours @ \$80 = \$16,000
 Carole Ann Guay 200 Hours @ \$80 = \$16,000
 Megan Hamilton 200 Hours @ \$80 = \$16,000
 Alycia Minshall 200 Hours @ \$80 = \$16,000
 Emily Hendrickson 200 Hours @ \$80 = \$16,000
 Hailey Holden 200 Hours @ \$80 = \$16,000
 Azba Hotelwala 200 Hours @ \$80 = \$16,000
 Jordan Ramsey 200 Hours @ \$80 = \$16,000
 Jay Roudebush 200 Hours @ \$80 = \$16,000
 Jon Watkins 200 Hours @ \$80 = \$16,000
 Jonathan Williams 200 Hours @ \$80 = \$16,000

Total 2,800 Hours @ \$80 = \$224,000



April 3, 2023

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing Advanced Planning Document (APD) Consulting Services under master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 14 months. BerryDunn agrees to a SOW start date effective May 1, 2023.

Assuming a start date of May 1, 2023, the work would then conclude on June 14, 2024, in alignment with the end date of the master contract. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

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

Nicole Y. Becnel
Principal
681-313-8905

Agreed

A handwritten signature in cursive script that reads 'Heather White'.



**Staffing Plan and Scope of Work for the
West Virginia Department of Health and Human Resources and
Bureau for Medical Services
Advanced Planning Document Consulting Services
Prepared for CMA # HHR 21*03**



Submitted by:

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

Submitted on:

April 3, 2023

berrydunn.com



Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources Advanced Planning Document Consulting Services

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health Human Resources (DHHR) to plan, develop, and help manage the Advanced Planning Document (APD) funding process. BerryDunn is currently providing APD support services within each individual SOW. The intent of this SOW is to bring all APD support activities under one project to improve quality, reduce the amount of time required to develop APDs, and to provide a consolidated view of all APD activities and federal support for the program. BerryDunn will provide Subject Matter Experts (SMEs) and other required resources to support the strategic planning of APDs. This SOW is henceforth referred to as the APD Consulting Services SOW.

1.0 Key Information

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide under the APD Consulting Services SOW.

Estimates for this SOW are based on the following assumptions:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State designated site and will be brought to the attention of the State project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The State leadership team will consist of Sarah Young, Deputy Commissioner as project sponsor and Brandon Lewis, Medicaid Enterprise Systems Office Director, as project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Nicole Becnel as Engagement Manager, Dawn Webb as Lead Project Manager, and Crystal Fox as Project Manager.
- The cost estimates include the development, management, and tracking of up to 25 APDs of varying complexity – including planning, implementation, and operations/maintenance – during this SOW.
- The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advanced Planning Document (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on July 15, 2022, for total state and federal funds in the amount of \$100,538,318 under project identifier WV-2022-05-31-MMIS-MITA-IAPDU. The estimated cost of the



services to be delivered under this SOW is \$1,373,600 (included in the approved APD). Therefore, any additional scope that is added to the services to be provided under this SOW may require that the State update its MMIS IAPD to allocate additional funds for project management.

- The work will begin upon approval of this SOW and a mutually agreed-upon start date and is projected to continue for 14 months.



2.0 Project Scope and Staffing Plan

Table 1 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 BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight 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>	Nicole Becnel Eduardo Daranyi Dawn Webb Crystal Fox	340
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>In support of Project Initiation, Project Execution, and Control, BerryDunn's leadership will meet with the project sponsor and lead on a regular basis to discuss project status and issues impacting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Initiation, Execution, and Control will also include:</p> <ul style="list-style-type: none">Developing a Schedule of APDs within 30 days of the kickoff meetingReporting on APD schedulesDeveloping project templates	Peter Alfrey Ebony Carter Susan Chugha Andrea Clark Sarah Colburn Amber Davis Julie DuPuis Crystal Fox Sudha Ganapathy Nora Gilligan Crystal Gray Valerie Hamilton	1,900



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Reporting on monthly activities by task Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Schedule of APDs D04: APD Templates <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control 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>	Jason Hargrove Marnie Hudson Megan Luce Alex Lyubarov Brody McClellan Emily McCoy Hilary Foster Moles Sarah Ratliff Lisa Roberts Tonya Roloson Shelly Schram Meghann Slaven Nicole Spears Jeff Stoddard Alex Tannenbaum Drew Thomas Liz Vose Dawn Webb Ethan Wiley Ryan Wrisley Megan Blount Caitlin Cabral Janine DiLorenzo Alex Glowacky Megan Hamilton Alicia Minshall Carole Ann Guay Emily Hendrickson Hailey Holden Azba Hotelwala Jordan Ramsey Jay Roudebush Jonathan Watkins Jon Williams	
3.0	<p>APD Tracking and Management</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist the State with processes for</p>	Peter Alfrey Susan Chugha	890



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>renewal and tracking progress in the development and submission of APD documents to CMS. Key tasks will include:</p> <ul style="list-style-type: none"> Managing the APD workflow and schedule for the State Tracking of APDs Conduct applicable APD research <p>BerryDunn will maintain a comprehensive budget and expense history for each project/APD to support the data provided to federal partners and assist in future budget projections.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Tracking and Management 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>Crystal Fox Jason Hargrove Brody McClellan Sarah Ratliff Dawn Webb Ethan Wiley Ryan Wisley Alex Glowacky Hailey Holden Azba Hotelwala</p>	
4.0	<p>APD Deliverables</p> <p><i>Service Approach</i></p> <p>BerryDunn will supplement State resources to assist with the increasingly complex work to develop, update, and manage multiple APD's in support of funding for new DHHR systems projects.</p> <ul style="list-style-type: none"> Develop and update APDs, drafting and finalizing new APDs annually, and the relevant work associated with APDs. Assist in the updating of APD project budget tables and MDBT tables <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D05: APD Submission Packages (per APD up to 25) <ul style="list-style-type: none"> Supporting Email Summary Transmittal Letter APD Narrative Medicaid Detailed Budget Tables (MDBT) Consolidated MDBT Incorporation of any changes requested by the State or CMS Resubmission of the APD Package, as 	<p>Peter Alfrey Ebony Carter Susan Chugha Andrea Clark Sarah Colburn Amber Davis Julie DuPuis Crystal Fox Sudha Ganapathy Nora Gilligan Crystal Gray Valerie Hamilton Jason Hargrove Megan Luce Alex Lyubarov Brody McClellan Emily McCoy Hilary Foster Moles Sarah Ratliff Lisa Roberts</p>	5,500



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>needed</p> <ul style="list-style-type: none">o Current Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Report <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Deliverables 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>Tonya Roloson Shelly Schram Meghann Slaven Nicole Spears Jeff Stoddard Alex Tannenbaum Drew Thomas Liz Vose Dawn Webb Ethan Wiley Ryan Wrisley Megan Blount Caitlin Cabral Janine DiLorenzo Alex Glowacky Carole Ann Guay Megan Hamilton Alicia Minshall Emily Hendrickson Hailey Holden Azba Hotelwala Jordan Ramsey Jonathan Watkins Jon Williams</p>	
5.0	<p>APD Strategic Planning Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will work with project stakeholders to update the State's APD process workflow and help facilitate strategic planning of APD submissions.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none">• D06 Updated APD Process <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Strategic Planning Support complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or</p>	<p>Peter Alfrey Susan Chugha Crystal Fox Jason Hargrove Brody McClellan Sarah Ratliff Dawn Webb Ethan Wiley Ryan Wrisley Alex Glowacky Hailey Holden</p>	595



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	his/her designee.	Azba Hotelwala	
6.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to the State 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>Deliverable(s)</p> <ul style="list-style-type: none">D07: Project Closeout Summary <p>Completion Criteria</p> <p>All parties will deem the Project Closeout 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>	Nicole Becnel Eduardo Daranyi Crystal Fox Dawn Webb	55
Total Hours			9,280
Total Not-To-Exceed Cost Estimate			\$1,373,600



3.0 Project Resources and Hours

Table 2 displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 2 in Central Master Agreement (CMA) # HHR 21*03.

Table 2: Project Resources

CL Year 2	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	80	\$21,600
1	LPM	\$215	Dawn Webb	200	\$43,000
4	GPM	\$175	Peter Alfrey	200	\$35,000
4	GPM	\$175	Ebony Carter	200	\$35,000
4	GPM	\$175	Susan Chugha	200	\$35,000
4	GPM	\$175	Andrea Clark	120	\$21,000
4	GPM	\$175	Sarah Colburn	200	\$35,000
4	GPM	\$175	Eduardo Daranyi	80	\$14,000
4	GPM	\$175	Amber Davis	200	\$35,000
4	GPM	\$175	Julie DuPuis	200	\$35,000
4	GPM	\$175	Crystal Fox	200	\$35,000
4	GPM	\$175	Sudha Ganapathy	200	\$35,000
4	GPM	\$175	Nora Gilligan	200	\$35,000
4	GPM	\$175	Crystal Gray	200	\$35,000
4	GPM	\$175	Valerie Hamilton	200	\$35,000
4	GPM	\$175	Jason Hargrove	200	\$35,000
4	GPM	\$175	Marnie Hudson	200	\$35,000
4	GPM	\$175	Meghan Luce	200	\$35,000
4	GPM	\$175	Alex Lyubarov	200	\$35,000
4	GPM	\$175	Brody McClellan	200	\$35,000
4	GPM	\$175	Emily McCoy	200	\$35,000
4	GPM	\$175	Hilary Foster Moles	200	\$35,000
4	GPM	\$175	Sarah Ratliff	200	\$35,000
4	GPM	\$175	Lisa Roberts	200	\$35,000
4	GPM	\$175	Tonya Roloson	200	\$35,000
4	GPM	\$175	Shelly Schram	200	\$35,000
4	GPM	\$175	Meghann Slaven	200	\$35,000
4	GPM	\$175	Nicole Spears	200	\$35,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Year 2					
4	GPM	\$175	Jeff Stoddard	200	\$35,000
4	GPM	\$175	Alex Tannenbaum	200	\$35,000
4	GPM	\$175	Drew Thomas	200	\$35,000
4	GPM	\$175	Liz Vose	200	\$35,000
4	GPM	\$175	Ethan Wiley	200	\$35,000
4	GPM	\$175	Ryan Wisley	200	\$35,000
5	SS	\$80	Megan Blount	200	\$16,000
5	SS	\$80	Caitlin Cabral	200	\$16,000
5	SS	\$80	Janine DiLorenzo	200	\$16,000
5	SS	\$80	Alex Glowacky	200	\$16,000
5	SS	\$80	Carole Ann Guay	200	\$16,000
5	SS	\$80	Megan Hamilton	200	\$16,000
5	SS	\$80	Alycia Minshall	200	\$16,000
5	SS	\$80	Emily Hendrickson	200	\$16,000
5	SS	\$80	Hailey Holden	200	\$16,000
5	SS	\$80	Azba Hotelwala	200	\$16,000
5	SS	\$80	Jordan Ramsey	200	\$16,000
5	SS	\$80	Jay Roudebush	200	\$16,000
5	SS	\$80	Jon Watkins	200	\$16,000
5	SS	\$80	Jonathan Williams	200	\$16,000
Totals				9,280	\$1,373,600



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



4.0 Project Hours and Costs per Month

Table 3 displays an overview of the project hours and estimated costs per month over the lifetime of the project:

Table 3: Project Costs by Month

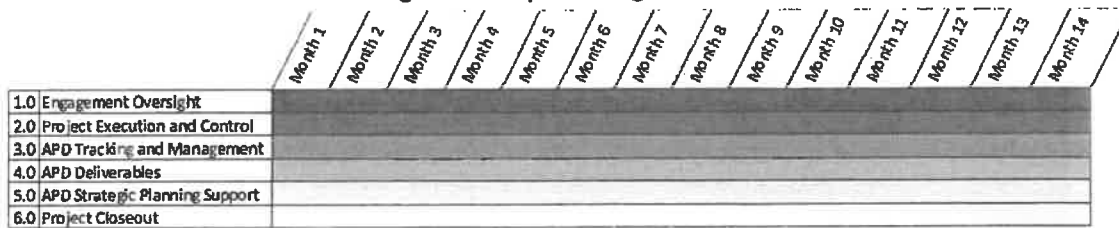
Month #	EM	LPM	GPM	SS	Estimated Hours Per Month	Estimated Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	9	14	443	200	666	\$98,965
Month 2	6	14	443	200	663	\$98,155
Month 3	5	14	443	200	662	\$97,885
Month 4	5	14	443	200	662	\$97,885
Month 5	5	14	443	200	662	\$97,885
Month 6	5	14	443	200	662	\$97,885
Month 7	5	15	443	200	663	\$98,100
Month 8	5	15	443	200	663	\$98,100
Month 9	5	15	443	200	663	\$98,100
Month 10	5	15	443	200	663	\$98,100
Month 11	5	14	443	200	662	\$97,885
Month 12	5	14	443	200	662	\$97,885
Month 13	6	14	443	200	663	\$98,155
Month 14	9	14	441	200	664	\$98,615
Total	80	200	6,200	2,800	9,280	\$1,373,600



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





6.0 MITA Alignment

The MITA alignment is important to the State's funding as well as overall program improvements. For assistance with MITA Alignment for a potential project, contact the PM for the WV MITA project. The MITA Alignment in the SOW should match the MITA Alignment used to request funding.

- MITA Road Map Transformation Goals
 - Gen 3.0 – Leverage technology to enhance performance and decision-making
- MITA Business Areas
 - CM, CO, OM, PE, PL
- Conditions & Standards (C&S)
 - Industry Standards Condition, Interoperability Condition, Leverage Condition

**BerryDunn Authorized Signature**

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



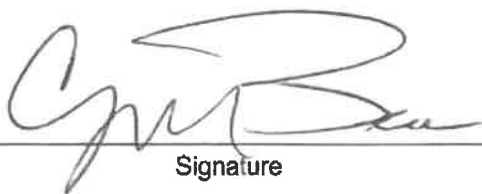
Signature

April 3, 2023

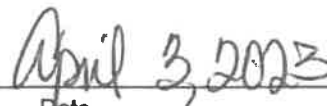
Date

DHHR Approval and Authorization

Approval of Scope of Work, Approach, Schedule, Staffing, Completion Criteria, and Not-to-Exceed Cost



Signature



Date



Appendix A: Resumes

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 Advanced 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 MTA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that participate monthly.

- *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) Advanced 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

**Dawn Webb, BSHL, CPC, COC, Prosci® CCP, LSSGB**

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	10 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 Prosci® Certified Change Practitioner LEAN Six Sigma Green Belt Certification Certified Project Management Professional

Overview

Dawn is a manager in BerryDunn's Medicaid practice, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has over 25 years of experience in medical claims processing and revenue cycle management – including over eight years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advanced Planning Documents (APDs).

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).**
 - *Quality Improvement Initiatives Portfolio Management (05/2019 to present).*
As quality improvement initiatives portfolio 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. Dawn also provides support to other engagement projects including:
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 to present).*



- *Data Improvement Project (09/2019 to present).*
 - *Public Health Emergency (PHE) Support (12/2021 to present)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to present).*
 - *Provider Management Support (11/2019 to present)*
 - *State Plan Review and Support (SPRS) (02/2020 to present)*
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022).*
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 to Present).*
- *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.
 - *TPL Procurement (05/2019 to 03/2022)*

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.

- **Hawai'i Department of Human Services Med-QUEST Division (MQD) – Medicaid Organizational and Business Process Redesign (11/2021 to June 2022).**

Dawn supported the MDQ in PERM corrective action planning and response.

- **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 the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including West Virginia, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

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. Dawn was a liaison for the MMIS configuration team and the WV BMS leadership.

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.

Garrnet 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.

Peter Alfrey, PMP, Prosci® CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	15 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. EPMO projects and programs include:
 - *Organization Development Services (06/2022 to present)*
 - *Public Health Emergency (PHE) Support (12/2021 to present)*
 - *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I, II and III (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 09/2022)*
- *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 08/2022)*
- *Contact Tracing (04/2020 to 09/2022).*
- *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 09/2022)*
- *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).*
Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 02/2018).
Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).

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).*
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).

- **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



Ebony Carter, MS

Proposed Project Role	General Project Manager
Role at BerryDunn	Senior Consultant
Years of Experience Related to Proposed Role	14 years
Education and Training	Bachelor of Science in Health Science, focus on Community Health, Towson University Master of Science in Health Science, focus on Community Health, Towson University Technical Institute of America-Project Management Certification Training Course

Overview

Ebony is a highly qualified Healthcare Analyst and Program Administrator professional with 10 years of experience in Healthcare Policy, Medicaid-CHIP program, Eligibility, MMIS, Customer satisfaction, and program management. She has demonstrated analytic, Medicaid audit, and problem-solving skills. Her expertise is in program monitoring, contracts management, finance/budgetary maintenance, communication, and program evaluation

Experience

BerryDunn (03/2022 to present). Ebony serves as a senior consultant with BerryDunn's Medicaid Practice Group, assisting the West Virginia BMS program

- **West Virginia Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement Project (PERM) (04/2022 to present)*
Ebony is serving as a project SME for the PERM Project. In this project, Ebony is responsible for reviewing Data Processing (DP) request for more information, and validating DP errors.
 - *Fee Schedule Edit Quality Review Phase V (04/2022 to present)*
Ebony is serving as a project SME for the Fee and Edit project. In this project, Ebony is responsible for researching and validating fee schedules and/or edits and delivering outcomes to the state of WV. While researching, she also reviews federal policy and state regulation to ensure that the fee schedule and edits are in line with existing and current policies.
 - *Public Health Emergency (PHE) Support Project (03/2022 to 06/2022)*
Ebony assists with tasks related to the PHE project.



- *PERM Advanced Planning Document (APD) (08/2022 to 10/2022)*
Ebony assists with tasks related to updating the APD document.

General Dynamic Information Technology (10/2021 to 03/2022). Ebony worked as a Senior Business Analyst with North Carolina State Medicaid MMIS to monitor and understand business functions, gather business requirements for enhancement or modification using Waterfall or Agile methodologies, and create system estimates to present to technical team and implementation director for approval. She conducted face-off meetings with state to understand, explain, and address business needs, and led design efforts and document system design. Ebony collaborated with project managers and technical staff to ensure successful implementation of system enhancements.

NCI, Information Systems (11/2018 to 10/2021). Ebony worked as a Data Processing Subject Matter Expert with CMS to provide technical direction and guidance to the data processing team and to CMS stakeholders. She created training material in line with CMS guidelines and federal regulation requirements, updated standard operating procedure guidelines for team, and monitored data processing workflow. Ebony performed quality assurance reviews of completed audits, conducted queries, and communicated data findings in written reports, oral reports, and presentations. She analyzed data to determine appropriate actions and was responsible for determining knowledge gaps, work process improvements, and technical system updates to assist with creating streamlined audit process. She created a review schedule to ensure milestones were met on time and reviewed all state MMIS systems to ensure claims adjudicated correctly, beneficiaries were eligible for services, and providers were enrolled and screened appropriately.

A+ Government Solutions, LLC/CNI Advantage LLC (08/2015 to 11/2018). Ebony worked as a Program Operations Manager with CMS to manage a team of 31 Health Insurance Payments Analysts responsible for conducting audits to determine if reimbursements to medical providers were compliant. She analyzed federal CFR and state regulations/policies for Medicaid and CHIP reimbursements, interacted with Medicaid state personnel to schedule audits and explain audit findings, and conducted queries and communicated findings. Ebony created reports to share with CMS stakeholders and state personnel, collaborated with Data Processing (DP) state leads and state personnel to determine readiness for the initiation of DP reviews, and assisted with development of review workflow processes. Ebony conducted detailed audits of MMIS to determine if states paid Fee-for-Service and Managed Care claims according to Medicaid CFR and state regulations under the Payment Error Rate Measurement Project. She researched, analyzed, interpreted, and applied provider Medicaid enrollment, recipient eligibility (CHIP and Medicaid), risk-based screening, and claims processing, CFR and state regulations when conducting audits of state claims. Ebony created operating procedures for navigating state MMIS systems, managed workflow through State Medicaid Error Rate Findings (SMERF) system and used the SMERF system, State MMIS, and eligibility systems to conduct audits. Ebony communicated with CMS about impediments that impede the team's ability to complete audits accurately and on time.

Maryland Department of Health and Mental Hygiene (DHMH) (07/2008 to 08/2015). Ebony



worked as an Agency Grant Specialist to monitor the life cycle of all grants and the budget and expenditures for DHMH Office of Preparedness and Response (OPR) cooperative agreements for the Department of Health and Human Services, Center for Disease Control and (CDC) and Prevention and Assistant Secretary for financial Resources (ASPR). She supported senior management in maintaining fiscal records of preparedness activities such as syndromic surveillance, plan implementation, incident reports, and after-action reports. She designed, developed, implemented, and interpreted grants/ assistance management policies, procedures, and best practices for monitoring cooperative agreements for CDC and ASPR. Ebony monitored a budget over \$30 million and was responsible for accounts payable paid by invoices used pay blocks according to the state of Maryland General Accounting principles. She developed standard operating procedures that adhere to CFR and Code of Maryland Regulations (COMAR) regulations, developed information packages for employees and awardees, and served as liaison to represent senior fiscal officer at staff meetings and conferences. Ebony monitored 23 counties and 1 city in the Medicaid Transportation Grant program for budget requirements and to ensure grantees and providers followed program goals, objectives, and regulations in accordance with CFR and COMAR). She analyzed and evaluated the program for efficiency and effectiveness of health care delivery and health initiatives by participating in routine audits (onsite reviews) of each jurisdiction ensuring compliance with COMAR regulations, Medicare and Medicaid regulations, and Maryland State Transmittals. She analyzed data for recipient Medicaid transportation needs, supported senior analyst in providing leadership and Medical Assistance Transportation guidance to state legislatures during conferences and workshops, and provided guidance on Managed care or Medicaid fee-for-service appeals. She managed, developed, implemented, and evaluated training curricula on Medicaid Managed Care, and Medicaid Transportation program. She developed standard operating procedures in drafting COMAR regulations to improve compliance with state and federal Medicaid and Medicare regulations.



Susan Chugha, Prosci® CCP

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

Overview

Susan is a manager for the Government Consulting Group (GCG) who brings over 16 years of project management experience. During the past seven years, Susan has honed her expertise on policy and Medicaid program efforts in various roles, including project manager, business analyst, and project coordinator. She focuses her time and experience on 1115 waiver demonstrations, years of experience with the Medicaid Information Technology Architecture (MITA) State –Self Assessment (SS-A) report and roadmap activities, business process improvement, project and program management.

Experience

BerryDunn (10/2015 to present). Susan works within BerryDunn's Medicaid Practice Group (MPG) and project highlights include the following:

- **West Virginia Bureau for Medical Services (BMS).**
 - *Substance Use Disorder (SUD) Waiver Initiative Project Phase V (10/2016 to present).*

Susan manages the current ongoing phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducts deliverable review on all documents. She performs research on SUD services, CMS requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on time for federal submission. During this most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development, negotiation, and approval phases of the project. She performed client outreach, managed communications with federal partners, scheduled meetings, captured



meeting notes, tracked action items and decisions, conducted research, and business analysis. Also, during the waiver implementation phase, Susan managed the development of a peer recovery support specialist webinar and was involved in policy development, public comment tracking, and policy approval. Under the waiver development phase, Susan assisted the client with developing a continuum of care for Medicaid enrollees with SUD by overseeing waiver negotiations with the Centers for Medicare & Medicaid (CMS). She facilitated meetings, performed research analysis, assisted in draft policy development, assisted with writing the waiver application, and created and maintained a work plan to track required tasks. Susan also scheduled and organized public hearings to promote the waiver application.

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

As project manager for the MITA 3.0 SS-A Maintenance and Annual Update Assistance project Susan assists with MITA lifecycle maintenance activities including developing new business process improvement flows and updating MITA related reports. Susan manages nine consultants and two sub-contractors. Her responsibilities include oversight of the team, budget, and time management, and peer review and delivery of required deliverables. She assists with the development of the update of the health information technology (HIT) report, data management strategy (DMS) report, and the technical management strategy (TMS) report. Additionally, during 2021 Susan monitored a team of subject matter experts to draft and deliver an organizational development (OD) plan and roadmap. She facilitated meetings and oversaw the development of the revised aged and disabled waiver (ADW) business process flow workgroups.

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

- *Data Improvement Project Phase 3 (12/2019 to present).*
Susan is the project manager for the DIP Phase 3 project. Susan is responsible for providing oversight to the project team on the day-to-day activities, handles meeting facilitation, peer review and monitors progress with all deliverables tracked against the agreed-upon schedule that will address data quality and usability issues identified within the Medicaid program.
- *State Plan Review and Support (SPRS) Project (03/2020 to present).*
As program manager, Susan oversees the project and BerryDunn team that handles updates to State Plan sections, attachments, supplements, and develops amendments.
Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and



documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages comply, compared service descriptions to federal and state guidance, and analyzed pages for overall accuracy.

- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Project (07/2021 to present).*
Serving as program manager, Susan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the West Virginia Medicaid Program. As part of this, Susan participated in writing and planning assistance for the “State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services” planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services.
- *American Rescue Plan Act of 2021, Section 9817 Home and Community Based Services (HCBS) Implementation Plan (05/2022 to present).*
As project lead, Susan oversees the day-to-day operations for this project, conducts research, and monitors the successful completion and submission of project and federal deliverables.
- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 to present).*
Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.
- *Organization Development (OD) Services Project (05/2022 to present).*
As a business analyst (BA) on the OD project, Susan assists with client relations, retreat planning and coordination, research, and writing assignments that help to inform strategic planning documents, in addition to other identified deliverables per the agreed upon SOW.
- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) Phase IV (09/2018 to present).*
As program manager for the CSEDW Phase IV project, Susan oversees the project team through oversight, project management, technical assistance, and monitoring risks and issues. Prior to Phase IV of the project, Susan helped monitor progress on the preparation of the CSEDW waiver renewal application. In 2018 Susan served as the project coordinator for the CSEDW project. Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.



- ***Provider Enrollment Application (PEA) Project (02/2017 to 11/2017).***
Susan provided project coordination assistance by maintaining all the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV provider enrollment application process.
- ***ICD-10 Transition Planning and Implementation (10/2015 to 02/2016).***
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

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

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

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

- **Project Specialist – Assistant Vice President**

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the US and assisted with follow-up after each program to track our successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.



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

- Created quarterly newsletters and other publications that were distributed internally.
- Coordinated the Mutual Funds, Sales and Operations (MFSO) program for wholesalers.
- Managed the valued-add and continuing education curriculums that were available to field wholesalers.
- Partnered with Learning and Development Managers to assist in coordination of training programs and on-boarding for new internal and external Wholesalers.

Bank of America Capital Management (formerly Nations Funds) (04/2001 to 05/2004).

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

**Andrea L. Clark, MS, Prosci® CCP**

Proposed Project Role	General Project Manager
Current BerryDunn Role	Senior Manager
Years of Experience Relevant to Proposed Role	20 years
Education and Credentials	Bachelor of Science in Foreign Service, The Edmund A. Walsh School of Foreign Service, Georgetown University Master of Science in Economics, The University of Wisconsin Prosci® Certified Change Practitioner (CCP) Member, American Economic Association Fluent in Spanish

Overview

Andrea is a senior economist and data scientist with a primary focus in healthcare systems and finance. Her expertise includes designing, managing, and analyzing large, complex healthcare databases; training state Medicaid agency clients in data quality and analytics; acting as a Health Insurance Portability and Accountability Act (HIPAA) privacy rule de-identification expert; preparing Medicaid managed care capitation rate bids; and assessing health insurance benefit mandates for state legislatures. She is heavily involved in healthcare reform initiatives, including, but not limited to, modeling projected financial impacts of Medicaid expansion and public health crises for health maintenance organization (HMO) clients.

Prior to joining BerryDunn and its Health Analytics Practice Group (HAPG), Andrea was a consulting economist for a Big Four consulting firm, conducting projects ranging from litigation support for a pharmaceutical firm to assessing treatment effectiveness for the federal Substance Abuse and Mental Health Services Administration.

Relevant Experience

BerryDunn (formerly Compass Health Analytics) (01/2002 to present). Andrea conducts quantitative research on various healthcare topics, with a primary focus on public-sector behavioral health and topics in healthcare reform. She acts as a HIPAA privacy rule de-identification expert; prepares Medicaid managed care capitation rate bids; advises Medicaid HMOs on market impacts of major policy and economic shifts; assesses health insurance benefit mandates for state legislatures; and advises state Medicaid agency clients on data quality and analytics.

- **West Virginia Department of Health and Human Resources (DHHR) – Child Welfare Initiatives Project Management Services (06/2020 to present).**
Andrea leads the HAPA team supporting the DHHR's Bureau for Children and



Families (BCF) in implementing its May 2019 Americans with Disabilities Act (ACA) agreement with the United States Department of Justice (DOJ). She designs and implements analyses and coordinates efforts to design and build a data reporting system and dashboard to enable the State to reach critical milestones in the agreement.

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

- *Technical Assistance and Project Support (TAPS) Phase IV (05/2022 to present). As SME, Andrea has contributed knowledge and analysis to task requests. Andrea also coordinates and leads research and tasks that fall under the scope of TAPS, such as the review and impact analyses of CMS rules that requires data knowledge.*
- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to present).*
Andrea provides oversight and Medicaid encounter data subject matter expertise to support the State's ongoing initiative to optimize MCO encounter data processes for its risk-based managed care programs.
- *Data Improvement Project (10/2019 to present).*
Andrea spearheaded the development of this project and provides strategic oversight and Medicaid data subject matter expertise to this effort. The Data Improvement Project empowers the State to identify, assess, and address data quality and usability issues across the State's Medicaid enterprise data systems by bringing together disparate Medicaid data users and consumers for training and feedback, deep analytical research, and development of process improvement recommendations.
- *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).*
Andrea provides claims and encounter data analysis and Medicaid SUD program expertise supporting the State's expansion of evidence-based care for Medicaid members with opioid use disorder (OUD) and other SUDs.
- *MMIS Contract Edit Review – Outpatient Surgery (04/2019 to 11/2019).*
Andrea led a team that analyzed BMS claims data to assess outpatient hospital surgery provider compliance with the BMS outpatient hospital surgery fee schedule, identifying potential cost savings opportunities for the State.
- *Adult Quality Measures Grant Project (10/2017 to 12/2017).*
Under a federal grant, the State requested BerryDunn to develop, teach, and record an original continuing education curriculum on quality



improvement to supplement training and continuing education resources for the BMS Quality Unit team. Andrea developed and presented an original curriculum on data quality, statistics, and healthcare analytics.

- **New Hampshire Insurance Department (NHID)**

- *Mental Health Parity Compliance Assurance Plan (CAP) Monitoring (05/2020 to present).*

Andrea is the data analytics lead for this effort overseeing examinations of commercial health insurer mental health provider network adequacy and reimbursement under the federal Mental Health Parity and Addiction Equity Act (MHPAEA) and state parity laws. To test for parity, New Hampshire utilizes innovative, nationally recognized quantitative methodologies developed in collaboration with HAPA using the New Hampshire Comprehensive Health Care Information System (NH CHIS), New Hampshire's APCD.

- *Healthcare Analytics (06/2016 to 12/2019).*

As the engagement manager for this contract, Andrea collaborated with NHID's Health Economics and Actuarial teams to establish priorities for contract resources and led a team of analysts in designing and implementing a variety of complex analyses of the NH CHIS. Sub-projects included identification of potential targets for fraud, waste, and abuse investigation and recovery; a quantitative study of variances in commercial health insurer provider contracting to inform regulatory decisions to promote consumer value; and the development of a public-facing report on statewide ambulance transportation utilization and expenses in the commercial market.

- *NH CHIS Public Use Data Set Redesign (02/2017 to 11/2017).*

In close collaboration with personnel from multiple state agencies, Andrea designed an enhanced public-facing state healthcare utilization reporting system with strong personal privacy protections. She developed a public-facing HIPAA expert determination report on the effort, implemented the enhancements in a test environment, and presented the proposed enhancements in a stakeholders meeting.

- **Massachusetts Center for Health Information and Analysis (MACHIA)**

- *Prospective Mandated Benefit Reviews prepared for the Massachusetts State Legislature (07/2004 to present).*

Andrea supports MACHIA in meeting statutory obligations to the legislature and informs legislative debate by co-authoring public reports and managing Massachusetts All Payer Claims Database (MA APCD)



data analytics for actuarial assessments of proposed Massachusetts state-mandated health insurance benefits.

- *Quadrennial Review of State-Mandated Health Insurance Benefits and Health Insurance Costs in Massachusetts (01/2006 to present).* Andrea led the MA APCD cost analysis and co-authored the 2008, 2013, and 2016 quadrennial editions of this statutorily mandated, public-facing report. She currently supervises the MA APCD cost analysis team developing the fourth quadrennial report, expected to be published in 2021.

- **Community Care Behavioral Health (CCBH, 01/2002 to present).** In support of this Pennsylvania Medicaid behavioral health MCO covering over 1,000,000 lives, Andrea consults to senior management on projected financial effects of Medicaid program changes and major public health events (e.g., COVID-19). In 2002, she was the architect and builder of CCBH's first data warehouse, greatly expanding access within the organization to performance reporting and actionable information. CCBH's Decision Support Department continues to use this original mart structure; the HAPA team continues its role supporting and enhancing the system and providing analytical programming expertise. Andrea led a separate data warehousing, management, and analysis effort enabling CCBH to be the recognized leader in implementing state-mandated efforts to share de-identified physical health, pharmacy, and behavioral health data and improve care coordination between behavioral and physical health Medicaid MCOs. Starting in 2005, she led HAPA's efforts in support of the preparation of CCBH's capitation rate proposals to the state, including coordinating clinical and actuarial input.

PricewaterhouseCoopers LLP (06/1997 to 01/2002). Andrea's positions with PricewaterhouseCoopers included:

- *Senior Associate (07/1999-01/2002)*
Developed and implemented economic, statistical, and financial analyses in a variety of fields, including healthcare and consumer credit. Managed multiple-track analyses of opposing party data. Supervised staff in implementing complex analyses.
- *Associate (06/1997-06/1999)*
Responsible for management and analysis of large databases. Developed and implemented econometric analyses of outcomes in employment discrimination, fair lending, and anti-trust matters.

**Sarah Colburn**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Bachelor of Arts in Developmental Psychology, University of Illinois Springfield Graduate studies, Human Development Counseling, University of Illinois Springfield MLC Certified Medicaid Professional (MCMP-II) Prosci® Certified Change Practitioner

Overview

Sarah is a committed, results-driven, detailed-oriented professional with 25 years of experience in the areas of leadership, program development, and problem solving. She brings a superior ability to research, develop, and implement strategies that are designed to optimize goals and achieve objectives. She has a proven success record in development of systems, processes, and procedures created to streamline operations and increase efficiencies.

Experience

BerryDunn (07/2019 to present). Sarah is a senior consultant with BerryDunn's Medicaid Practice Group.

Iowa Department of Human Services

- *Iowa MES Modernization Project (5/2022 to present)*
Sarah is currently serving as the provider enrollment SME for the modernization efforts in Iowa. Her duties include vendor procurement efforts, RFI development, strategic planning, proactive risk and issue management, and assistance to build strong relationships and trust between all stakeholders.

West Virginia Bureau for Medical Services (BMS)

- *Fee Schedule and Edit Quality Review Project (02/2020 to present).*
Sarah currently serves as the project manager, assisting West Virginia with research and analysis of policies, procedures, and MMIS configuration, which often provide cost-savings opportunities for BMS. She manages budgets and project deliverables and works closely with the client to ensure requirements and expectations are fully met.
- *Provider Enrollment Services (PMS) Project (09/2019 to present).*
Sarah is currently serving as a Subject Matter Expert (SME) for the PMS project and has previously served as the Project Manager. Her current role in the project consists of assistance with the enrollment of Medicaid providers into the MMIS,



developing documentation, and review of federal guidelines to ensure West Virginia is remaining compliant with new and existing guidance.

- **Public Health Emergency (PHE) Support Project (03/2020 to 07/2022).** Sarah supported the project with research of specific states and how they navigated through the PHE. She was responsible for completion of the COVID News Roundup which outlined federal and state updates and was presented to BMS on a bi-weekly basis.

Illinois Department of Healthcare and Family Services (09/2018 to 07/2019). Sarah served as a business analyst for the Medicaid state entity. She assisted State staff in creating policies that are consistent with requirements and mandates of federal and state administrative rules. She worked as a member of the federal compliance and certification team for the State, assisted with UAT for software upgrades to the IMPACT system, and assisted with completing review of paid claims for CMS PERM and state audit completion. She also worked investigating and documenting PERM audit findings to assist the State in resolution of seemingly inappropriately paid Medicaid claiming.

Illinois Department of Human Services (10/2010 to 09/2018). As a Medicaid consultant, Sarah served as a liaison with the Department of Aging, Department of Developmental Disabilities, and Department of Healthcare and Family Services personnel to ensure compliance with federal rules and regulations. She performed claiming reject investigations, resubmission of corrected claiming data using electronic data processing, and recommendations for claiming software modifications. Sarah was the lead worker assisting the Department in review and response of Illinois Healthcare and Family Services (IHFS) financial auditing for several Federal budget periods.

CQuest America (03/2001 to 05/2009)

- **Manager, Systems Integration and Project Management (04/2008 to 05/2009).** Sarah provided oversight of new software development to increase productivity and efficiency of the central billing office. She managed timelines, distribution of duties, budgetary guidelines, and final production for all projects required by the central billing office to the meet the contractual requirements of the Illinois Early Intervention Program.
- **Manager, Central Billing Office (09/2006 to 04/2008).** In this role, Sarah managed daily operation of claims, provider enrollment, third-party reimbursement, Medicaid, and central support functions for the Illinois Early Intervention Program. She ensured that the office met all contractual and procedural requirements of the program, as mandated by the Department of Human Services, and worked to develop and implement procedural guidelines to receive maximized Medicaid matching funds.
- **Manager of Insurance Claims Processing (07/2005 to 09/2006).** Sarah had oversight of claims and insurance unit functions for the Illinois Early Intervention Program. She established and organized an insurance unit whose primary function was to maximize private insurance benefits and implemented trainings to educate service providers and regional office staff.
- **Claims Processing Supervisor (03/2001 to 07/2005).** Sarah's duties included payroll



functions, preparation, and distribution of yearly evaluations, hiring, and preparing reports. She also assisted in the development and implementation of insurance billing policies for the Early Intervention Program.

University of Illinois at Chicago – Division of Specialized Care for Children (03/1997 to 03/2001)

- **Medical Claims Specialist.** Sarah was responsible for effectively managing and processing various types of medical claims received, updating, and maintaining claim files, responding timely to internal and external inquiries for claims information, preparation of letters, reports, and forms, and confirming claim payments were made based on relevant federal and state regulations. She also was responsible for review and resubmission of previously denied claims to Illinois Medicaid.

**Eduardo Daranyi, MEd, PMP**

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

Overview

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

Experience

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

- **West Virginia Bureau for Medical Services (BMS) (2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; ACA analysis, and advisory services; ICD-10 compliance; E&E systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; CHIP implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives. Since Ed joined the West Virginia project on a full-time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.
 - *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (2019 to present).*
Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide more



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

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

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

- o *People's Access to Help (PATH) DDI Project Management (10/2017 to present).* Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access to Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met, and risks and issues are appropriately escalated and addressed.

- o *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*

As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD



demonstration. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

- *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 Advanced 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) – Independent Verification & Validation (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.



Amber Davis

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 Criminology, Minor in Sociology and Women's Studies, Indiana University of Pennsylvania Nonprofit Management Certification, Butler County Community College MLC Certified Medicaid Professional (MCMP-II) Certified Community Health Worker, Pennsylvania Certification Board Certified Investigation (CI) Certification, Pennsylvania Department of Human Services Office of Developmental Programming

Overview

Amber is an experienced director with a history of working with teams to promote, leadership, motivation, and intention. She specializes in organizational growth, conflict resolution, effective management, quality assurance, public speaking, innovation, and government relations.

Experience**BerryDunn (09/2022 to present)**

- **West Virginia Bureau for Medical Services (BMS) – EVV Solution Implementation Project (09/2022 to present)**
Amber will provide project management support for the Provider Management Services project and the Electronic Visit Verification (EVV) project for the State of West Virginia.
- **West Virginia BMS – Provider Enrollment (PEA) Project and Provider Management Support (09/2022 to present)**
Amber will also provide support for the provider enrollment partnership between West Virginia and the US Virgin Islands.

Centene Corporation, PA Health & Wellness (10/2021 to 8/2022)

- **Manager, Provider Relations (10/2021 to 8/2022)** Amber led the Long Term Supports and Services (LTSS) provider relations team, covering the Pennsylvania territory. She was responsible for maintaining production and quality standards, external relationships, developing new provider relationships,



assisting with contracting activities and was a subject matter expert on the CommunityHealth Choices model. Amber would also monitor activities with providers and team members such as provider onsite visits, credentialing, and orientations.

Alliance for Nonprofit Resources (10/2012 to 10/2021)

- *Senior Director of Operations and Service Development (09/2017 to 10/2021)*
Amber led \$9.2 million dollars of programming and 325+ team members throughout Pennsylvania. She successfully implemented statewide expansion adding seven regions to daily operations, established \$2.5 million dollars of organizational growth from Brokers, Schools, Managed Care Organizations, Administrative Entities, Commercial and Nonprofit businesses, and instilled trust in clients by providing them with transparent communications. She enforced quality assurance and contract obligations as well as acted as an informal publicist to highlight team's best qualities, represented ANR during consultations, state and county level, and served as a Solutions Engineer.
- *Director of Operations (06/2015 to 09/2017)*
Amber spearheaded General Operations in collaboration with the Board, other executives and staff, while launching the development of regional expansion planning. She shaped relationships and managed agreements with external partners and evaluated and transformed the efficiency of business procedures according to organizational objectives.
- *Senior Operations Manager (11/2013 to 06/2015)*
Amber established and carried out departmental/organizational goals, developed programs, policies, and procedures, and oversaw fiscal and budgetary activities.

Operations Manager (10/2012 to 11/2013)

Amber analyzed and improved departmental processes, monitored daily operations, quality, productivity and efficiencies, and developed program training standards.



Julie DuPuis, MPA

Current Position	General Project Manager
Role at BerryDunn	Senior Consultant
Years of Experience in Health Care Industry	20 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

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 (06/2022 to present).**

- **West Virginia Department of Health and Human Resources**
 - *Medicaid Enterprise System and Enterprise Data Solution projects (06/2022 to present).*
Julie serves the Enterprise Data Solution project as a subject matter expert supporting data profiling, testing and requirements gathering support.
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (06/2022 to present).*
Julie serves the Medicaid Enterprise System Modernization Strategy and Procurement project as a subject matter expert supporting requirements gathering and research 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 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.

Michigan Department of Health and Human Services (12/1998 to 09/2012) Departmental Specialist, Senior Analyst, Lead Worker, State of Michigan, Department of Community Health, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section



Crystal Fox, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II) Prosci® Certified Change Practitioner

Overview

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

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

- **West Virginia Children's Health Insurance Program (WVCHIP) - Managed Care Organization (MCO) Transition Project (02/2021 to present).**
Crystal serves as the project manager for the WVCHIP MCO Transition project where Crystal assists the State team in the daily operations and oversight of the MCOs that are transition the WVCHIP fee-for-service population to an MCO-based population. In this role, Crystal communicates with the State and Vendor partners regularly, reviews deliverable documents, analyzes enrollment reports, and facilitates weekly meetings between the organizations. Crystal manages budgets, timelines, and project resources to help ensure the project remains compliant with federal and state regulations.
- **West Virginia Department of Health and Human Resources (DHHR)**
 - **Medicaid Enterprise System Modernization Strategy and Procurement (MES MSP) (02/2021 to 05/2022).**
Crystal served as a project SME and research analyst researching various States Medicaid Module implementations and contracts. Crystal served on a team analyzing Vendor Request for Information (RFI) responses to provide estimated outcomes for the MES MSP teams Strategic Plan presented to the State.
 - **People's Access to Help (PATH) DDI Project Management (08/2020).**
Crystal served as a project SME for the Financial Management and Flexi financial module reviews by providing insight on the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.



- *Child Welfare Initiatives Project Management Services (06/2020 to 08/2020).*
Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract request for proposal (RFP) for the Bureau for Children and Families' child placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.
- **West Virginia Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement (PERM) Project (10/2019 to present).*
Crystal serves as a SME for the PERM project. Crystal focuses on validating data processing and eligibility errors, researching error remedies, and providing recommendations for resolution of PERM errors cited for West Virginia to reduce the error rate, which affects the federal match the state receives.
 - *Fee Schedule Edit Quality Review (10/2019 to present).*
Crystal serves as a project SME. Crystal reviews documents and information compiled from policy as well as claim-related stored procedures and desk-level procedures (DLPs) to help ensure compliance with the State Medicaid Plan and State Medicaid provider manuals. Crystal also performs multi-state analysis of telehealth policies to identify opportunities for WV to expand covered services, reviews the current MMIS configuration to support the Medicaid National Correct Coding Initiative (NCCI) editing, and reviews MMIS system configuration to identify where the system does not match the current State Plan or Medicaid policy. Crystal also develops a research summary that provides the client with the findings of the review and recommendations to remediate.
 - *Advanced Planning Document (APD) Assistance (06/2020 to 08/2020).*
Crystal served as a business analyst for MMIS APD development and updates by updating expenditures and budget based on the previous prior requests to calculate a request for the current and upcoming years.
 - *Enterprise Program Management Office – COVID-19 Waivers and Flexibilities (03/2020 to 06/2020).*
Crystal served as a business analyst by researching the waivers and flexibilities implemented under the Coronavirus Aid, Relief, and Economic Security (CARES) Act during the public health emergency. Crystal prepared summaries or tracking documents based on the research findings, which was incorporated into presentations presented to the client by project leads.
 - *Mountain Health Promise (MHP) Implementation Project Management Support (12/2019).*
Crystal served as a project SME. Crystal supported the Operational Readiness Review (ORR) by performing secondary evidence review for the Financial Management section to help ensure that scoring, determinations, and findings were complete, accurate, and corroborated.
- **Puerto Rico Medicaid Program (PRMP)**
 - *Enterprise Objective Monitoring and Control (EOMC) RFP Development Assistance Services (02/2021 to 05/2021).*



Crystal served as a project SME providing RFP research and development assistance. Crystal gathered example RFPs, Request or Quotes (RFQs), or RFIs from other states, RFP requirements, and Service-Level Agreements (SLAs) to assist with the development of the Puerto Rico MMIS RFP.

- *EOMC Services (08/2020).*

Crystal served as a business analyst for the Medicaid Enterprise Organizational Structure (MEOS) subproject by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

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

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

**Sudha Ganapathy, PMP®, Prosci® ITIL (F), LSSGB, MCMP-II**

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

Overview

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

Experience**BerryDunn (07/2015 to present).**

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *People's Access to Help (PATH) DDI Project Management (10/2019 to present)*
Sudha is supporting the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. As a PMO and System Integration Test (SIT) lead, Sudha creates, reviews and provides input into project testing deliverables, coordinates project activities, and assigns and oversees team assignments for 8-10 consultants. In addition, Sudha is helping this project



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

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

- *Medicaid Performance Management & Quality Assurance (MPMQA) Phase II (05/2022 to present)*

As the Project Manager on the MPMQA project, Sudha is responsible for coordinating the quality assurance activities related to Medicaid. She worked with the last project manager to finalize the Statement of Work and Governance documents and worked on the Advanced Planning Document (APD) for 2023. Sudha collaborates with the functional, testing, and certification teams on the PATH project to gather the information necessary to present in the MPMQA status report. This report is sent to the BMS Deputy Commissioner monthly.

- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016).* Sudha assisted with the RAPIDS transition facilitation project and identified and documented risks/issues prior to the transition of RAPIDS from Deloitte to Optum. She also assisted with tracking Project Change Requests (PCRs) and creating reports to capture the aging of the defects, reviewed and provided feedback on process documents such as the Incident Management Report and Problem Management Report.

- **Massachusetts HIX/IES Entities – IV&V Services (07/2016 to 09/2019).**

Sudha served as the BerryDunn IV&V testing lead for nine end-to-end project release cycles. In this role, Sudha interfaced with the State and vendor (Optum) counterparts to provide deliverable quality oversight, process improvement guidance, and enforced program and project best practices in Project Communication, Integration, Quality Management and Risk Management per the Project Management Body of Knowledge (PMBOK®).

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

For an alternate project for the same client, Sudha also played a key role in developing a new JIRA® Implementation and Requirements Management Plan. She worked with the



MassIT analysts to analyze existing ALM/JIRA® data elements and define them in the new JIRA® instance.

- **West Virginia Bureau for Medical Services (BMS) – Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 08/2016).**

Sudha assisted with UAT for BMS' MMIS re-procurement in the MITA business area of Provider Management. She reviewed and assisted with modifying the Doc Matrix, which was the primary document that drove the Provider Enrollment web portal options based on provider types.

XEROX – Government Health Solutions/Cognizant Technology Solutions (2012 to 2015).

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

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

UNISYS (2000 to 2006). Sudha supported the Louisiana MMIS, converting several Easytrieve programs to COBOL and successfully promoting them to production. She was a member of the Medicaid Eligibility Determination System (MEDS) enhancement team, responsible for the modification and testing of several Management and Administrative Reporting Subsystem (MARS) programs to accommodate new recipient processing files. She conducted testing and provided Quality Assurance support to the testing team within critical staffing and time constraints. She partnered with team members in formulating their test cases to ensure testing was conducted and completed on time. In addition, she led Acceptance Testing for McKesson HBOC ClaimCheck project in the project leader's absence, ensuring required tests were completed successfully a timely manner.

**Nora Gilligan, MPA**

Proposed Project Role	General Project Manager
Role at BerryDunn	Senior Consultant
Years of Experience Relevant to Proposed Role	12 years
Certifications and Education	Bachelor of Science in International Health, Georgetown University Master of Public Administration, Baruch College, School of Public Affairs

Overview

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

Experience

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

TEK System (09/2018 to 07/2020).

- **BerryDunn (06/2019 to 07/2020)**
 - **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (06/2019 to present).** Nora played an integral role on the West Virginia (WV) People's Access to Help's (PATH) Certification and Compliance team, preparing the state for integrated eligibility system (IES) assessments by multiple federal agencies. Nora leverages subject matter expertise in several program areas to lead research, analysis, and tracking of federal certification requirements for WV PATH:
 - Maintained relationships with State business partners to manage WV Department of Health and Human Resources (DHHR) review of programmatic criteria sets, to provide evidence of system compliance and ensure full Federal Financial Participation (FFP) from federal partners.



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

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

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

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



approval process, to offer states interpretation of flexibilities offered within TANF legislation to address housing and related needs.

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

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

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

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



Crystal Gray

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts, West Virginia State University MLC Certified Medicaid Professional (MCMP-II)

Overview

Crystal is a manager with in BerryDunn's Government Consulting Group who brings nearly two decades of diverse management experience to the group. In recent years, Crystal has focused on project management and resource coordination in which she has been a crucial part of assisting clients and vendors. Crystal has also focused orienting new hires within the GCG group. Crystal currently is the project manager focused on helping state health and human services agencies achieve their project objectives.

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

- **West Virginia Department of Health and Human Resources (DHHR) – Medicaid Eligibility and Enrollment Implementation Assistance (04/2022 to present).**
Crystal is currently serving as the program manager overseeing BerryDunn's PMO team supporting the implementation project for West Virginia's Integrated Eligibility System (IES) also called People's Access To Help (PATH) to support the eligibility, enrollment, and administration of the WV DHHR's human services programs, including Medicaid, CHIP, SNAP, TANF, Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. She manages the PMO team that provides project management, certification and compliance support working directly with CMS and State stakeholders, APD, deliverable review, testing support, organizational change management (OCM) support, requirements support, and general subject matter expertise supporting the PATH DDI project. She works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).
- **West Virginia Department of Health and Human Resources (DHHR) – Medicaid Eligibility and Enrollment Implementation Assistance (01/2019 to 04/2022).**
As the resource coordinator, Crystal conducted daily meetings for team organization and motivation, provides quality control for meeting materials to satisfy the contract Service-Level Agreement (SLA), scheduled meetings according to project priorities to help



ensure project stay on schedule, provided organization to team for vendor accountability, managed project Request for Information (RFI), and provided subject matter expertise in project meetings.

- **West Virginia Department of Health and Human Resources (DHHR) – Medicaid Eligibility and Enrollment Implementation Assistance (01/2018 to 01/2019).**

As a project coordinator Crystal had a variety of responsibilities, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

- **West Virginia Bureau for Medical Services (BMS) – COVID-19 Emergency Services Sub-Project (04/2020 to 07/2020).**

Crystal reviewed the COVID-19 response efforts of all 50 states and U.S. territories to help inform the development of West Virginia's COVID-19 response strategy. She performed project research, organized project information according to priority, created the website review for the COVID-19 Weekly Round-Up presentation, and presented website review from the COVID-19 Weekly Round-Up to BMS on a weekly basis.

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



Valerie Hamilton, JD, MHA, RN

Proposed Project Role	General Project Manager
Role at BerryDunn	Senior Manager
Years of Experience Relevant to Proposed Role	25 years
Certifications and Education	Bachelor of Arts in Psychology, The Ohio State University Master of Health Administration, Division of Health Services Management & Policy, College of Public Health, The Ohio State University Juris Doctorate, The Ohio State University College of Law Registered Nurse, Diploma, Providence Hospital School of Nursing Prosci® Certified Change Practitioner

Overview

Valerie, an experienced clinician and legally trained health policy expert, has significant experience in clinical provider operations, healthcare policy, healthcare law, QA and management practices, and healthcare business operations. Her previous years as a critical care nurse combined with her healthcare management experience and health policy expertise allow for unique insight into the issues that enhanced transparency is intended to address.

Experience

BerryDunn (formerly Compass Health Analytics) (2016 to present). As a health policy manager, Valerie conducts health policy analysis, including legislative and regulatory reviews. Reviews cover a wide range of topics including the impact of government programs or mandates on population healthcare utilization and outcomes. She assists clients with the challenges of managing behavioral health including those arising from substance use disorder and the ongoing opioid crisis. She conducts mental health parity reviews to determine and promote compliance with the Paul Wellstone and Pete Domenici Mental Health Parity and Addiction Act (MHPAEA) as well as state mental health parity laws.

Promerica Health, LLC (2014 to 2016). As the vice president of Compliance and Communication, Valerie launched the health and wellness screening laboratory. She also oversaw clinical operations, compliance, quality, accreditation, and licensing.

Prudential Financial (2013 to 2014). As a clinical consultant, Valerie collaborated with other professionals to evaluate disability claims for potential and capacity for return to work based on physiological and social factors.

The Ohio State University Wexner Medical Center (2000 to 2013). Valerie served as a legal consultant, performing reviews of medical liability lawsuits. Prior to this position, she served as the Director of Quality and as a hospital attorney from 2000 to 2002, responsible for monitoring and improvement of quality at a satellite hospital location. She oversaw quality initiatives and assisted with JCAHO accreditation.



HeartCare, Inc. (1998 to 2000). As a practice administrator, Valerie was responsible for business operations and growth of this invasive cardiologist practice.

Clinical Medical Experience (1992 to 1997)

- Grant Medical Center, Registered Nurse – Critical Care
- Grant / Riverside Methodist Hospitals / OhioHealth, Graduate Administrative Associate (Internship) / Program Coordinator (Project Based)
- The Ohio State University Wexner Medical Center, Graduate Administrative Associate / Research Assistant / Registered Nurse

**Jason Hargrove, MBA, PMP**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Science in Marine Engineering Operations, Maine Maritime Academy Master of Business Administration, Grantham University Certified Project Management Professional MLC Certified Medicaid Professional (MCMP-II)

Overview

Jason is an experienced leader and implementation manager, delivering IT software solutions and services in healthcare and engineering for over 19 years. Jason brings a diverse range of skills and experience including business development, finance, budgeting, contract management, team development, recruiting, resource management, and project management. He leads by example, fostering communication at all levels of the organization and is familiar with complex and difficult situations.

Experience

BerryDunn (02/2018 to present). Jason serves BerryDunn's Medicaid consulting clients as a project manager.

- **Alaska Division of Health Care Services (HCS) – MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to present)**
Jason is the project manager for BerryDunn's team assisting HCS with visioning, researching, and developing an MMIS solicitation
- **West Virginia Bureau for Medical Services (BMS) – Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to present).**
Jason is the project manager for BerryDunn's team assisting BMS with the implementation of their overall EVV solution, which includes support in several key areas:
 - 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 on-boarding



- Vendor deliverable review
- UAT planning and support

Northern New England Diagnostics 02/2017 to 08/2017). As chief of operations, Jason developed client implementation process/strategy, created detailed plans for new client onboarding and key issues, and oversaw all operational staff, internal systems, and business processes. Jason was also responsible for performing staff and operational assessments regarding quality and production, developing staff training and mentoring plans for development and quality improvement, and ensuring services met quality and cost effectiveness standards. Jason created and maintained profit and loss (P&L) financials and associated data models to assist with client valuation and forecasting.

Change Healthcare (formerly Goold Health Systems / Emdeon) (11/2005 to 02/2017). In his time at Goold Health Systems, Jason held several positions including:

- **Senior Director of Pharmacy Administration Services** – In this role, Jason continued to build relationships and further integration into the organization's centralized operations and processes. He worked closely with GM/VP on business and operational initiatives and was responsible for the oversight of 17 management and administrative positions (over 160 staff members).
- **Vice President of Administration** – Jason developed companywide initiatives to increase operational and deployment efficiencies and served as the account manager, project manager, implementation manager, or other lead roles in key projects as needed. He participated in contract negotiations, lease negotiations, and the establishment of remote offices as required. Jason also reviewed project plans and resources for companywide projects and ensured sufficient staffing levels and resources. In addition, Jason managed the business development function and staff, pursued strategic opportunities in collaboration with the CEO and business development team, and assisted with and oversaw the development of cost estimates, timelines, scope, project plans, and proposal responses.
- **Director of Administrative Services** – Jason planned, organized, assigned, directed, and evaluated the activities of the department. He also assisted the CEO in contract adherence, contract negotiations, lease negotiations, and hiring processes. He worked with the business development director in the development of cost estimates, timelines, scope, project plans, and proposal responses. Additional responsibilities included overseeing facility leases, maintenance, construction, and expansion as needed.
- **Strategic Project Manager** – In this role, Jason was responsible for the direction, coordination, and completion of assigned strategic projects. He also assisted with business development and RFP responses, developed and implemented project management tools and tracking methods, and managed



administrative office and project staff members.

While at Change Healthcare, some of Jason's major projects included:

- **Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017).** Jason served in several capacities on the Ohio project including business development, project leadership and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams and coordinating on-site staff. During the project, the named Implementation Manager left the organization and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation and client relations.
- **Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016).** As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.
- **Iowa Medicaid Enterprise PBM (04/2012 to 10/2013).** Jason led the reprocurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SMEs in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.
- **Utah CMS certification support (2012).** Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.
- **Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 to 10/2011).** Jason served as the Implementation Project Manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and



management, meeting facilitation, risk and issue management, report management and client engagement. This project also included more intensive training of state staff and product education, change request management and issue resolution.

- **Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 to 05/2009).** As the Project Manager, Jason worked closely with internal business leads and the client to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders and the incumbent vendor. Typical project activities included meeting facilitation, requirement, risk and action item management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client and business SMEs to successfully certify the system.
- **Maine Medicaid Mailroom and BPO (HCFA, UB, ADA) and Medical Prior Authorization.** Jason served as internal project executive to manage the conversion of an existing sole-source contract to a sub-contract and establish a new department within the company. In this role, Jason participated in negotiations with several potential prime vendor partners to develop pricing and a successful bid strategy. After source selection, he worked with a new partner to define operational processes, quality standards and technical integration. New office space and hiring was completed successfully. Jason served as the implementation lead and the business unit manager for the new and existing services as part of this project, including staff management, quality oversight, and vendor/client relations.

Ingersoll-Rand (03/1998 to 11/2005). As a mechanical engineer, Jason served as a team leader for Laboratory Operations & Reliability. In this role, he managed operations and reliability efforts through direct reports and matrixed team. He created project plans and provided daily management and guidance of both lab and engineering personnel to ensure timely completion of assigned tasks. Projects included directing company-wide reliability efforts to deal with issues relating to new product development, and working with engineering and Underwriter's Laboratory (UL) to successfully list IRs 70kW product.



Marnie Hudson

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Associate degree, Computer Science Information Systems, Delaware Community College Bachelor of Science in Computer Information Systems, Strayer University MMIS Level II – Claims Certification Medicaid MMIS Level I Certification

Overview

Marnie is an experienced business and QA analyst with a developer background and more than 19 years of experience in assisting with the implementation of state Medicaid Management Information Systems (MMISs). Her background includes leadership roles on five MMIS implementations and one integrated eligibility system consisting of multiple state social services. In her roles, she managed on-site and offshore teams to successfully develop, implement, and test design of requirements. Her developer background helps to clarify design of requirements and how they should be implemented to support the client's business needs.

Experience**BerryDunn (11/2017 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (02/2018 to present).**

As a Requirements Lead on the People's Access to Help (PATH) project, Marnie is supporting the success of West Virginia's Integrated Eligibility Solution (IES) project, which will consolidate and integrate DHHR program service systems into a single enterprise. She manages and tracks the PATH Requirements Traceability Matrix to help ensure each project release supports DHHR's program business needs. She participates in configuration design sessions to help ensure the vendor is accurately understanding and capturing stakeholders' business needs and supporting business rules. In addition, she reviews and provides input on project deliverables, and she assists with project activities associated with requirements, including the review and validation activities for the Document Inventory (forms, letters, notices) of all legacy systems. Marnie also provides monthly and periodic status reports for Requirements and Design, including the readiness of each project release.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (11/2017 to 01/2018).** As a PMO and UAT SME, Marnie supported testing related activities as part of the West Virginia / New Jersey Leverage and Reuse Project and worked collaboratively with the New Jersey Replacement Medicaid Management Information System



Implementation Team Office. She provided input into the preparation of UAT planning activities, provided support with project activities associated with MMIS system interfaces, and conducted testing related research as needed to support project activities/testing efforts.

S2Tech/Conduent (07/2016 to 05/2017). As a senior business analyst, Marnie drove the implementation of the New York Medicaid Management Information System (NYMMIS). This included mapping eMedNY legacy data for Financial and Claims appropriately to the database fields in new system, conducting table level analysis on both NYMMIS tables and legacy MMIS tables, and leading the data conversion component for the financial subsystem for the new NYMMIS.

S2Tech/Xerox (02/2013 to 07/2016). During Marnie's time with S2Tech/Xerox, she worked on several projects.

- **Mississippi Modernized Medicaid Eligibility Determination System (03/2015 to 07/2016).** Marnie tested interface components, trained and led team members to ensure the proper conduct of testing methodologies and procedures, ensured accurate creation and execution of ~300 complex test script scenarios, successfully led the testing team through execution of test scripts across 16 different interfaces/batch processes to support the eligibility determination requirements for approval or denial of Medicaid benefits, and documented and managed testing defects.
- **North Dakota Medicaid Management Information System (NDMMIS) (02/2013 to 03/2015).** Marnie acted as a SME for the implementation of the NDMMIS. She ensured all testing efforts were developed and conducted to satisfy the Service Authorization and Electronic Document Management System functional area requirements, ensured the successful execution of ~400 test script scenarios, conducted concept sessions to discuss system functionality, and managed testing defects.

Independence Blue Cross (IBC) (06/2012 to 01/2013). As a senior business analyst, Marnie maintained compliance with CMS mandates and initiatives through various programs in Medicare, including Medicare Part D and the summary of benefits for products. She compiled requirements for improved operational process of monitoring Medicare client's maximum out-of-pocket threshold via the creation of an Access database and conducted concept sessions with product owners to capture business needs for improvements to Access databases.

Hewlett Packard Enterprise Services (01/2004 to 06/2012). Marnie served as chief liaison as well as directed all operational and technical communication activities between HPES (internal and external), the Delaware Medical Assistance Program management team, CMS, and the Delaware Prescription Drug Plans. She also served as a functional developer lead of the MMIS. This included leading the design and development of Medicare Part D System changes using SDLC methodologies, serving as a SME in the Provider & Third-Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the Reference Subsystem.



Meghan Luce

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Science in Public Health, State University of New York at Albany

Overview

Meghan is a dedicated health and human services professional, experienced in the assessment, evaluation, and implementation of health programs for individuals with physical and mental health diagnoses. She has focused experience with the development of service standards, regulations, and policies, and is highly skilled in data collection and analysis.

Experience**BerryDunn (04/2022 to present).**

- **West Virginia Bureau for Medical Services- West Virginia Children with Serious Emotional Disorder Waiver (CSEDW) (04/2022 to present)**
Meghan continues to work on the maintenance of their 1915c CSEDW. She explores Medicaid and rate structures for innovative ways to address state needs through waiver programs. Meghan has experience coordinating with CMS for 1915(c) applications and amendments. Activities include development of the 1915(c) application for continued waiver services, amendment updates to ensure service programs are current with practice standards and federal requirements, drafting policy updates to coordinate with program updates as approved by CMS, and assistance with oversight and performance monitoring to support compliance efforts. Ongoing CMS reporting and coordination with other project areas, including the DOJ Agreement and Mental Health Parity.

TEKSystems (10/2021 to 03/2022).

- **BerryDunn (10/2021 to 03/2022)**
 - **West Virginia Bureau for Medical Services- CSEDW (10/2021 to 03/2022)**
Meghan worked as a consultant to assist the client with oversight and management. She assisted the CSED team with research of different Medicaid eligibility expansion options (TEFRA & 217). Activities include meeting facilitation, develop and review deliverable content, including but not limited to waiver amendments and CMS annual reporting. Providing child welfare subject matter knowledge to support the



program in achieving its objectives. Manage and report project status (scope, schedule, budget, activities, accomplishments, risks, issues, etc.). Plan and execute project activities, with the support of a team and senior leadership. Serve as the primary point of contact with the client, as well as other state, federal, and vendor stakeholders as directed by the client.

New York State Technology Enterprise Corporation (10/2020 to present). Meghan worked as a consultant and business analyst to research timely filing rules for Medicaid to align with EVV data cycles, collaborate with team members and conceptualize, deliver, and support clients through today's ever-changing healthcare landscape. She supported healthcare technology initiatives through applying strong business analysis, critical thinking and problem-solving skills. Her primary project was monitoring New York State's implementation of Electronic Visit Verification (EVV) to comply federally with the Cures Act and avoid FMAP reductions. The scope of work involved program and policy development, responding to internal and external stakeholder inquiries, compliance development and program monitoring. She reviewed Federal Regulations to ensure New York State complies and is aware of federal requirements. Meghan also researched other states to monitor how they are implementing EVV systems, developed training standards and training material for NYS EVV program, and monitored NYS compliance with 21st Century Cures Act.

New York Department of Health (10/2018 to 10/2020). Meghan worked as a senior healthcare program specialist responsible for the oversight and monitoring of contracted New York State Health Homes and designated Home and Community Based providers to ensure compliance with Federal and State regulations and guidelines. She worked to resolve Medicaid enrollment issues with agencies and NYSDOH Eligibility department and developed training materials for workforce ("Medicaid 101"). She provided oversight and guidance to 1915(c) waiver transition providers during the consolidation to the Children's Waiver, including the transition of enrolled waiver children. She identified and corrected Restriction Exception codes for the Health Home Serving Children, Children's Waiver and members transitioning to the Office of People with Developmental Disabilities Comprehensive Waiver. She contributed to the development Health Home Serving Children and Home and Community Based Service policy, guidance and training material, reviewed policy and procedures developed by Health Homes for compliance to New York State and Federal guidelines, and attended on site audits of Health Home across New York State.

Transitional Services Association, Inc. (02/2017 to 10/2018). Meghan worked as a program supervisor with the Adult and Youth Care Management team of seventeen care managers to provide guidance to new staff on the Medicaid process and check members eligibility monthly to ensure Health Home billing for members and adults. She represented the agency at meetings and events, coordinated activities and ensured compliance with the policies of three separate Health Homes under the New York State Department of Health, and verified all program referrals and Medicaid eligibility. She reviewed documentation for appropriateness to meet chronic condition or behavioral health criteria and provided support for identified clients through



the outreach process, assist Care Managers when needed regarding enrolled clients. Meghan performed ongoing, internal audits of Medicaid billing systems and program statistics, developed policy and procedure documents in cooperation with the quality assurance committee, and innovated training and in-services for newly hired staff and to improve service delivery. She also managed program budgets and client support funds. She redesigned program documentation for youth and adult non-Medicaid programs for a more uniform system and assisted with state and federal audits of Medicaid Health Home client charts. Additionally, she conducted intake appointments with new clients, review referrals, Medicaid eligibility, and complete appropriate assessments, including intake assessment, comprehensive, crisis plans, and CANS.

Joseph's House & Shelter (12/2015 to 02/2017). Meghan worked as a supported housing advocate to assist individuals living with a disabling behavioral health diagnosis, cognitive disabilities, substance abuse disorders, or medical conditions. She helped members apply for Medicaid benefits, ensure they had all necessary components for annual recertification process of Medicaid benefits and coordinated with social and medical service providers to identify and ensure stable housing options. She provided on-call services every eight weeks to two supported housing programs with 60 residents. Meghan coordinated home and community-based services for Medicaid eligible individuals with disabilities and assisted individuals with the annual housing recertification process and obtained all necessary documents for HUD.

**Alex Lyubarov**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consulting Manager
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Science in Computer Engineering, Dagestan State Technical University Master of Science in Computer Engineering, Dagestan State Technical University MCP (Microsoft Certified Professional) PSI - Business of Health Care Providers, Payers and Life Sciences CompTIA A+ Certified

Overview

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

Experience**BerryDunn (08/2021 to present).**

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (07/2021 to present).**
Alex is currently serving as the program manager overseeing BerryDunn's PMO team supporting the implementation project for West Virginia's Integrated Eligibility System (IES) also called People's Access To Help (PATH) to support the eligibility, enrollment, and administration of the WV DHHR's human services programs, including Medicaid, CHIP, SNAP, TANF, Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. He manages the PMO team that provides project management, certification and compliance support working directly with CMS and State stakeholders, APD, deliverable review, testing support, organizational change management (OCM) support, requirements support, and general subject matter expertise supporting



the PATH DDI project. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

Technology Professionals Group Inc. (11/2019 to 07/2021). Alex worked as a senior program manager and senior business-technical consultant to support all phases of New York State DOH Medicaid Data Warehouse (MDW) implementation cycle, developed customer deliverables in accordance with contract requirements and state documentation standards, and researched and provided recommendations to the client on critical business decisions. He helped on RFP/RFQ proposal responses including all aspects of document development. He also assisted leadership by providing consulting expertise in State & Local Government and Healthcare industries. He helped support daily program/project teams to support the enablement and expansion of the new and existing business initiatives.

KPMG (05/2014 to 05/2019). Alex worked as a manager assisting the State of Connecticut Department of Social Services (DSS) on their Integrated Eligibility Systems (IES) and Medicaid projects with project management and data analysis. Alex liaised between the systems integrator, IV&V and State stakeholders to help ensure the project was on time and within the budget. He also assisted on the New York State Integrated Eligibility Systems (IES) project, he helped develop state RFP for systems integrator vendor, in addition, he led the team of consultants to perform audit/analysis for New York County's (62) IT Systems. Alex worked as a PMO manager to lead a team of SMEs Healthcare Patient Access and Revenue Cycle assessment and implement projects for process improvements, enhance the patient experience, and reduce financial risks.

Albany Medical Center Hospital (09/2008 to 05/2014). Alex worked as a senior systems analyst to implement vendor purchased solutions, analyze EHR/EMR deployment, and assess needs of internal business units. He performed systems application support and provided on-site technical support for multiple environments.



Brody J. McClellan, MPA

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

Overview

Brody is an innovative consultant with 15 years of experience in Medicaid, including as a state administrator and program officer with Michigan's Medicaid Actuarial Division, Outreach and finance specialist at an academic medical center, and work as a consulting project lead for California's Medicaid Directed Payments. Subject matter expert in Medicaid finance with experience in program operations, Intergovernmental Transfers, Directed Payments, Pass-Through Payments, UPL programs, charity donation leveraging, Graduate Medical Education programs, and encounter data management. Collaborative communicator continually focused on building relationships and promoting synergy across business lines and global units to drive positive change, cohesive, comprehensive business approaches and enhanced profitability

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

Brody serves as Project Lead to create a new State Plan Amendment for West Virginia Medicaid to provide Community Based Mobile Crisis Intervention Services.

Mental Health Parity Compliance Project (09/2021 to 9/2022)

Brody served as Project Lead to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and CHIP to ensure compliance with federally mandated mental health parity rules.

Mountain Health Promise (MHP) re-procurement project (09/2021 to present)

Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.

Mountain Health Trust (MHT) re-procurement project (09/2021 to present)

Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.



Medicaid Enterprise Systems (MES) re-procurement project (09/2021 to 3/2022)

Brody serves as Medicaid Finance and Actuarial Subject Matter Expert

Puerto Rico Department of Health Medicaid Program (12/2021 to 6/2022). Brody served as Medicaid Finance and Actuarial Subject Matter Expert on the Puerto Rico finance and policy support team.

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

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

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

Michigan State University (04/2015 to 10/2017). Brody worked as the Medicaid Federal Leveraging Specialist & Access to Care Program Manager (Medicaid Special Financing Project) as well as Data Science & Analytics/Business Intelligence Cell lead for the University. He delivered high-level program financial management and control including invoicing, payments and encumbrances processing, intergovernmental transfer processing, and revenue control



functions. He provided oversight of two subordinates responsible for program management and support and directed cross-functional teams across the organization. He administered over 100 contracts, consulted with contracted affiliate Hospital and Provider Clinics regarding Medicaid compliance, program structure, and access to care issues and financial maximization strategies allowed within compliance standards, and liaised with the State of Michigan Medicaid Office.

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



Emily E. McCoy, RN, BSN, 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 Science in Nursing, Marshall University Registered Nurse Certified Project Management Professional Certified Executive Coach

Overview

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

Experience

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

- **New Jersey Division of Medical Assistance and Health Services (DMAHS) – MMIS Modernization (7/2022-present)**

Emily is serving as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advanced Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.

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

- *Public Health Emergency (PHE) (10/2021 to 7/2022).*

Emily served as a subject matter expert (SME) for the PHE "Unwinding" project.

Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help them "unwind" and get the policies and eligibility processes back to a pre-COVID state, once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 to 10/2021).*



Emily currently serves as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DHHR align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provides a valuable perspective and ability to help the State obtain its desired outcomes.

- *Eligibility and Enrollment Implementation Assistance (01/2018 to present).*
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily can combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
- *Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020).*
Emily served as the project manager for the West Virginia DHHR EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DHHR that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018).**
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA – Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 to 04/2017).**
Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

West Virginia Department of Health and Human Resources (DHHR) (11/2013 to 06/2016).
Emily served as the Director of the MMIS for West Virginia with overall duties involving the



oversight and management of the MMIS and the contracted Fiscal Agent. In this role, she was responsible for managing several projects that would be integrated into the MMIS. Specific duties as the Director of MMIS included:

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

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

- *Medicaid Management Information system (MMIS) (01/2007 to 10/2013).*
Emily served as the manager of operations with the MMIS for West Virginia with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including long-term care and hospice services.
- *Office of Behavioral and Alternative Health Care (01/2005 to 12/2006).*
Emily served as the program manager of the State Medicaid Long-Term Care Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, Pre-Admission Screening and Resident Review (PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.
- *Office of Behavioral and Alternative Health Care (01/2003 to 12/2004)*
Emily served as a Health & Human Resource Specialist in the State Medicaid Long-Term Care Program with overall duties involving the supervision and oversight of claims



processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the Minimum Data Set (MDS), billing, and medical eligibility.

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

- **Transitional Care Unit (05/1999 to 12/2002).** During her time on the Transitional Care Unit, Emily held several different positions.
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.
- **Neuroscience Unit (01/1998 to 05/1999).** As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:
 - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
 - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
 - Serving as a representative on the Standards and Practice Council and Procedures sub-committee
 - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
 - Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients
- **Behavioral Health Unit (07/1996 to 01/1998).** Emily began her nursing career on the Behavioral Health Unit, with overall duties involving the advocacy of patients while providing direct patient care to individuals with mental illness.

Hilary Foster Moles, RN, BSN, Prosci® CCP



Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Science in Nursing, West Virginia Institute of Technology Registered Nurse MLC Certified Medicaid Professional (MCMP-II) Prosci® Certified Change Practitioner

Overview

Hilary, a registered nurse, is a senior consultant in BerryDunn's Government Consulting Group with comprehensive clinical and state agency policy development and analysis experience. Hilary provides project management services for West Virginia's Payment Error Rate Measurement (PERM) project, and Public Health Emergency (PHE) Support project. She brings expertise in case management, Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) claims processing.

Experience

BerryDunn (04/2019 to present)

Hilary serves as part of BerryDunn's Medicaid Practice Group, working with the West Virginia BMS on project management initiatives.

- **West Virginia Bureau for Medical Services (BMS)**
 - *Quality Improvement Initiatives Program Manager (07/2022 to present).*
As quality improvement initiatives program manager, Hilary is providing project support in the areas of process improvement, best practices, and staffing allocations for the Payment Error Rate Measurement (PERM), Fee Schedule and Edit Quality Review, and Medicaid Performance Management and Quality Assurance (MPMQA) Support Services projects.
 - *Public Health Emergency (PHE) Support Project (10/2021 to present).*
Hilary is serving as the project manager for the PHE Support project, to assist West Virginia with the preparing and planning of unwinding activities once the PHE ends. This project includes tracking program flexibilities, assisting with the development of processes and initiatives to rollback current efforts, and supporting all PHE-related activities. Hilary is managing budgets and project deliverables and collaborates closely with the client to help ensure the team meets the project requirements, and expectations.
 - *Payment Error Rate Measurement (PERM) Project (04/2019 to present).*
Hilary began the PERM project as a subject matter expert (SME), before her



current role as project manager. She is managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes support throughout all pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for West Virginia, and supporting the Medicaid Eligibility Quality Control (MEQC) portion of the PERM review.

- ***MMIS Fee Schedule and Edit Quality Review (04/2019 to present).***
Hilary is serving as program manager as well as a project SME. In previous project phases, she completed analyses of the MMIS configuration of Medicaid benefits, and prior authorization requirements in comparison to Medicaid policy. Additionally, Hilary completed an analysis of telehealth policies to identify opportunities to expand telehealth coverage for West Virginia. She has collaborated with BMS and Gainwell to evaluate claim edits to help ensure the MMIS setup and current processes comply with Medicaid policy and national standards.
- ***State Plan Review and Support (SPRS) Project (09/2020 to 01/2021).***
As a business analyst, Hilary worked with the project team to analyze the West Virginia Medicaid State Plan and assist the State to make process and document improvements for long-term policy compliance and sustainability.
- ***COVID-19 Emergency Services Sub-Project (03/2020 to 10/2020).***
Hilary supported the project with tracking of federal waivers, WV Disaster Relief State Plan Amendments (SPAs) and other COVID-19 related legislative policy changes. Hilary researched and advised the client of other state policy implementations daily. She attended weekly Centers for Medicare & Medicaid (CMS) stakeholder calls and advised the client of noteworthy changes to help them stay current with the evolving changes during the public health emergency.

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

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

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

**Sarah Ratliff, MBA, Prosci®**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Arts in Psychology and Criminology/Investigations, West Virginia University Master of Business Administration, University of Charleston MLC Certified Medicaid Professional (MCMP-II)

Overview

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

Experience

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

- **West Virginia Bureau for Medical Services (BMS)**
 - *Provider and Managed Care Portfolio Management (07/2022 to Present).*

Sarah provides oversight to the Program Managers of the Provider and Managed Care Programs. Sarah works with each of the Program Managers to help ensure adequate staffing is available across the program, provides strategic direction regarding the program areas, and ensures the programs are meeting the needs of the client.
 - *Provider Program Management (06/2019 to 6/2022).*

Sarah served as the program manager for the provider projects under the Provider and Managed Care enterprise portfolio management structure. Sarah provides oversight to the project managers of the projects within the Provider Program including Provider Management Services (PMS), Electronic Visit Verification (EVV), Access to Care (ATC), and the Electronic Health Record



(EHR) Promoting Interoperability (PI) Audit. Sarah works with each of the project teams to help ensure adequate staffing is available throughout the project, project milestones are met, and solutions are reasonable and viable options for the client. Additionally, she provides executive-level communications regarding project progress, risks, issues, and key decisions

- *West Virginia Children's Health Insurance Program (WVCHIP) Managed Care Organization (MCO) Transition Project (01/2021 to present).*

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

- *EVV Solution Implementation Project (10/2020 to present).*

Sarah is the project manager for the EVV Solution Implementation project where she manages project documentation including budgets and timelines, and works closely with the client to help ensure project tasks remain on track and in compliance with federal guidelines. Sarah assists the client with outlining new and existing federal regulations that are required to be met through this process. She has led the team through the request for proposal (RFP) development process, successfully evaluated bids, and supported the client as the new vendor, HHAeXchange, was on-boarded. Sarah effectively communicates with the federal partner, CMS, on a regular basis to help ensure the client is remaining compliant with new and existing federal guidance.

- *Third Party Liability (TPL) Procurement Assistance Project (10/2020 to 02/2021).*

Sarah serves as the interim project manager for the TPL Procurement Assistance project where she assists the client with RFP activities, including coordination of the vendor question and answer process; preparations for the proposal evaluation process, including development of the scoring documentation; and preparations for onboarding the new TPL vendor. Sarah monitors project documentation including budgets, timelines, and deliverable activities, as well as provides the client guidance regarding communications to and from CMS.

- *Enterprise Project Management Office (EPMO) Project (11/2018 to present).*



Sarah assists with project management tasks and coordination of the overall engagement. Sarah works closely with the client on staffing and project approvals, and assists with managing the tracking of all projects within the engagement.

- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 06/2019).*

Sarah is currently serving as the organizational change management lead for the EVV implementation project. Sarah works closely with the client to plan, coordinate, and facilitate bi-monthly stakeholder meetings. Sarah assists with all stakeholder correspondence and communicates with all interested parties on a regular basis.

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

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

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

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

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

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

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

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

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



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

Publications and Presentations

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

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

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

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



Lisa Roberts

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	32 years
Education and Certifications	Certified Project Management Professional

Overview

Lisa is a highly capable hands-on leader with a demonstrated ability to enlist the enthusiasm and participation of internal staff and external customers. She brings expertise with public programs including TANF, SNAP, CHIP, Medicaid, Child Welfare and Developmental Disabilities programs. Her experience includes managing government contracts and budgets, overseeing multi-state programs, and building strong professional relationships. Lisa co-leads the Child Welfare practice area and supports various states and agencies with expertise in home and community-based service development.

Experience

BerryDunn (07/2022 to current). Lisa is a Manager in BerryDunn's State Government Consulting Group, focusing on assisting state agencies with overall program management, procurement support, strategic plan implementation, and process redesign projects. Lisa is currently dedicated to the following project:

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

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

BerryDunn (02/2021 to 6/2022). Lisa is a Senior Consultant in BerryDunn's State Government Consulting Group, focusing on assisting state agencies with overall program management, procurement support, strategic plan implementation, and process redesign projects. Lisa is currently dedicated to the following project:

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

Lisa is a Child Welfare Lead for BerryDunn and manages the team focused on statewide child welfare reform to improve outcomes and reduce unnecessary out of home placements for children across West Virginia. The child welfare effort requires



cross agency collaboration with the Bureau for Social Services (BSS), Bureau for Medical Services (BMS), and the Bureau for Behavioral Health (BBH). This multi-year project includes program and process improvement, policy development and implementation, stakeholder engagement and significant focus on continuous quality improvement including data and reporting.

Embassy Management, LLC (05/2009 to 02/2021)

- **Executive Vice-President of Operations and Workforce Services (03/2013 to 02/2021).** In this role, Lisa has oversight of four Operating Companies providing services in New Mexico, California, Washington and Oregon. Government funding sources and contracts that she is responsible for managing include:
 - Medicaid Waiver Services in California, Washington and Oregon.
 - Federal TANF funding for a statewide program throughout New Mexico
 - County funded services throughout Washington.
 - Residential services for individuals with a Developmental Disability in Los Angeles and Sacramento
- **Vice-President of Workforce Services (06/2011 to 02/2013).** During her time in this role, Lisa authored the winning statewide proposal to provide TANF employment and case management services for the State of New Mexico. The initial contract award was for \$8.9M; Lisa was successful in expanding the contracted services to over \$20M annually within three years.
- **Director of Workforce Services (05/2009 to 05/2011).** Lisa was responsible for the oversight of workforce services providing employment services for individuals with developmental disabilities and other vulnerable adults. She oversaw eight county-funded contracts and programs throughout Washington State providing competitive community employment opportunities for individuals with developmental disabilities.

Arbor Education and Training, LLC (04/2003 to 04/2009). As the Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, evaluation and improvement for TANF funded services through the Idaho State Division of Welfare for two separate regions.

Idaho Division of Welfare (09/1991 to 03/2003). During her 13-year tenure with the State of Idaho, Lisa held various positions including determining eligibility for SNAP, Medicaid, TANF, Child Care, Aid to the Aged, Blind and Disabled (AABD). The following highlight positions held during her tenure:

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



- Eligibility Examiner



Tonya Roloson

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

Overview

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

Experience

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

West Virginia Department of Health and Human Resources (DHHR)

- Medicaid Subject Matter Expert on the West Virginia Children's Severe Emotional Disturbance Home and Community Based Waiver project.
- Medicaid Subject Matter Expert on the West Virginia Mountain Health Promise (MHP) re-procurement project.
- Medicaid Subject Matter Expert on the West Virginia Mountain Health Trust (MHT) re-procurement project.
- Medicaid Subject Matter Expert for West Virginia Mobile Crisis Services Planning Project working to create a new State Plan Amendment for West Virginia Medicaid to provide Community Based Mobile Crisis Intervention Services.
- Medicaid Project Manager for West Virginia Certified Community Behavioral Health Center Project working to create a new State Plan Amendment for West Virginia Medicaid to provide health and behavioral health services.



- Medicaid Subject Matter Expert for the West Virginia Mental Health Parity Compliance Project that works to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and CHIP to ensure compliance with federally mandated mental health parity rules.

PCG-SSO, New York Department of Health (11/2016 to 11/2021). Tonya worked as the Medicaid program manager to collaborate with inter-agency State teams creating policy and implementation strategies for Children's Behavioral Health in NYS. She developed multiple Medicaid waivers and State Plan Amendments, including: 1115 demonstration waiver, 1915(c), 1915b.4, acted as a subject matter expert on program pieces relating to internal Requests for Proposals (RFPs). Tonya ensured RFPs were written directly to CMS standards, created work plans, and monitored timelines, working cross functionally with state agencies including Office of Mental Health, Office of People with Developmental Disabilities, Office of Children and Family Services, Office of Addiction Services and Supports, New York state office of Temporary and Disability assistance, and Dept. of Health. She also reviews fee-for-service and Medicaid managed care claims, denial reports and utilization to develop reports for stakeholders and compliance. She engaged CMS directly, developed Medicaid policy, and reviewed financial/implementation reports for grant funded projects. Tonya also reviewed Medicaid Managed Care Plan readiness as related to model contract and Children's Behavioral/Physical Health Standards and reviewed policy according to department and program needs. She performed readiness and compliance reviews, liaised with stakeholders, and monitored and implemented policy for Medicaid billing and enrollment. She worked with stakeholders to develop or update state regulations and/or Public Health Law.

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

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



administrative duties, and maintain accurate documentation.

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

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



Shelly Schram, CAPM®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	4 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 healthcare and 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 supported 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 worked as a subject matter expert (SME) for Advanced 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 served as the project SME for the TPL project. She focused on business analysis, project coordination, and management tasks. As a SME, Shelly supported 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). She supports the Quality Control (QC) unit in error tracking and drafting of the Medicaid Eligibility Quality Control (MEQC) Planning document.

- ***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. Her work entails reviewing deliverables, including business/technical design documents and system specifications, for quality, compliance with contractual requirements, and alignment with industry standards and best practices; identifying issues and providing recommendations for remediation; supporting UAT.

- ***Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2021 to present).***

Shelly serves as the Deputy Certification Lead and provides federal regulatory and certification subject matter expertise on the project. She is supporting the State and vendor in preparation for the Operational Readiness Review (ORR) and Certification Review (CR) for the solution. Shelly is working stakeholders in reviewing and determining state-proposed outcomes and corresponding metrics.

- ***West Virginia Public Health Emergency (PHE) Support (04/2022 to present).***

Shelly serves as a SME for the project. She focuses on tracking flexibilities and associated tasks for completion once the PHE has ended.

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 analysed 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 online databases to compile into a constituent



report.

- ***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.



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 deputy project manager, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, and quality). 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 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 Advanced Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed Visio process flows to document client data sharing practices.

- *Gap Analysis and Project Management Services (10/2017 to 06/2018).*

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

- **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 Advanced 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.



Nicole Spears, MBA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Education and Certifications MBA, Healthcare Management, Western Governors University BS, Corrections, University of Indianapolis Indiana Licensed Real Estate Broker

Overview

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

Relevant Experience**BerryDunn (07/2021 to present)****West Virginia Bureau for Medical Services (BMS)**

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2021 to present).*
Nicole is currently serving as the SME for the Managed Care Encounter Data Quality Project, an assignment focused on supplying project management services to the state to assist with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). This project is also developing an SDLC Coordination Plan to operationalize updates based on state prioritization which will transition to state ownership.
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2021 to present)*
Nicole is currently serving as the SME for the MES Modernization Strategy project, a project focused on the planning activities for an MES modernization strategy and procurement. The project will plan and estimate implementation costs for a modernized



MES and aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA) goals.

Gainwell Technologies, formerly DXC Technology (12/2017 to 07/2021)

Nicole served as a senior business advisor for the Member Management Module Team as Kansas developed a new modular MMIS. The Member Management Module includes Member Eligibility, Medicare Management, Eligibility Verification Systems (EVS), and Early and Periodic Screening, Diagnosis, and Treatment (EPSDT).

Nicole also led the Business Analysts in the module and produced the end products User Interface (UI) design and security for all subsystems, as well as all system documentation for subsystems (Design Expectations Document, Detailed System Design, Business Design Documentation, etc.), subsystem certification through the Medicaid Enterprise Certification Toolkit (MECT) and provided expertise for testing for all subsystems (i.e., test plan, results, and defect review).

SR Advise (01/2016 to 12/2017)

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

SVC, Inc. (07/2012 to 12/2015)

Serving as the operations and MCO SME for the company, Nicole managed high-profile, complex program and system implementations reporting to and advising senior leadership. She assisted in the development of Medicaid pilot programs by identifying potential operational and implementation impacts and proposing best practices.

Nicole also identified areas of opportunity and recommended strategies for process improvement for clients' established programs through the consideration of potential impact(s) of policy and program changes on operations and vendors. She led multifaceted system and program changes in the Medicaid Managed Care arena based on these recommendations. Her experience includes RFP development and response, policy manual creation, MMIS DDI communications development, readiness review development, and administration.

Key contributions include leading cross-functional teams in implementation of the complex, high-profile Healthy Indiana Plan (HIP) 2.0 program; developing a comprehensive readiness



review program for implementations of managed care programs; growing both the staff and client base for the company.

State of Indiana (07/2008 to 04/2012)

Office of Medicaid Policy and Planning (OMPP) – Technical & Systems Integration Manager (02/2011 to 04/2012).

Nicole was hired to overhaul the business side SDLC processes for the unit. In this newly established role, she led multiple cross-functional teams while managing system changes impacting Indiana Medicaid, with a focus on vendor system integration. As the Managed Care technical SME with extensive knowledge of MMIS and vendor systems, Nicole helped establish and design the new change control team. This team oversaw scope, ensured requirements and design, served business needs, and provided the opportunity for system integration by giving vendors a voice at the table.

This role also oversaw vendor compliance. Nicole directed her staff in executing audits and quality control on MMIS and vendor systems changes, as well as MCO performance reporting. This oversight formed recommendations to the compliance team on corrective actions and performance monitoring.

Key contributions include being a key stakeholder in Indiana's initiative to determine response to the Affordable Care Act (ACA); overhauling change order processes to reduce duplication, waste, and inefficiencies throughout the agency; Interim Compliance Manager leading compliance team in oversight of MCOs; Reviewer for Indiana's Data Warehouse/Decision Support System RFP.

Professional Licensing Agency (PLA) – Board Director (08/2010 to 02/2011).

The Indiana PLA oversees boards and commissions that regulate professions. As a Board Director, Nicole was responsible for managing staff operations, including achieving group goals, training, and member satisfaction. She guided four boards and commissions in policymaking and rule promulgation in cooperation with agency and Attorney General's Office legal counsels, resolved consumer complaints, and facilitated board litigation.

Key contributions include establishing a compliance program to detect and address fraudulent accountancy practices throughout the state; implementing audit procedures to evaluate staff performance; rewriting the Indiana Auctioneer Commission admissions test; and bringing all boards into federal compliance by resolving outstanding action items.

Boards served: Indiana Auctioneer Commission; Indiana Board of Accountancy; Indiana Manufactured Home Installer Licensing Board; Private Investigator and Security Guard Licensing Board.

OMPP – Policy Analyst (07/2008 to 08/2010).

Nicole directed project implementation, policy development, and program management of Governor Daniel's 1115 waiver program HIP. She served as the technical resources liaison between vendors and program management with extensive knowledge of the state's Medicaid



systems. In this role, she oversaw SDLC and policy impacts for all large initiatives impacting the Managed Care Unit.

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

Key contributions include identification of root causes of systemic issues that led to resolution of EDI transaction failures; implementation of member issue resolution process resulting in reduced eligibility issues; readiness review development and management for the combined MCO re-procurement.

Keystone Builders (04/2005 to 07/2008)

As Sales Manager, Nicole was personally responsible for builder's two most profitable years of sales in the state of Indiana. She successfully managed all builder communities and launched the builder's On Your Lot division in Indiana. Nicole maintains an Indiana Real Estate Broker license.



Jeff Stoddard

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

Overview

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

Relevant Experience**BerryDunn (12/2019 to present)**

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

- **West Virginia Bureau for Medical Services (BMS)**
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to present).*
Jeff provides technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.
 - *Data Improvement Project (12/2019 to present).*
Jeff provides technical leadership and analytic support for the project that assists the state in understanding and addressing data quality and usability issues affecting its Medicaid program.
 - *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
Jeff provided technical leadership and business analysis support to the Department of Health and Human Resources (DHHR) for the implementation of



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

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

- **Data System Development**

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

- **Analytic Enclave Implementation**

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

- **Development and Implementation of a More Robust Information Security Program**

Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.

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

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



Alex Tannenbaum

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Science in Business, Clemson University

Overview

Alex is a consultant in BerryDunn's Medicaid consulting practice. He brings five years of resource and client management experience to the group. Alex's positive energy, excellent organization and communication skills, and professionalism nicely complements his current work on the Eligibility and Enrollment Implementation Assistance project, where he focuses on project, resource, and reports coordination and management.

Relevant Experience**BerryDunn (09/2020 to present).**

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

Currently Alex is the Internal PMO Manager for a large-scale, system implementation project directly impacting four DHHR agencies in West Virginia. He is responsible for the management of the following work streams: Project Schedule, Project Scope, PMO Tool Management, Monthly Status and Readiness Reporting, Budget, Deliverables, Compliance, System Security, Certification, Issues, Risks, Action Items, Assumptions, Decisions (IRAAD), Audits, Project Resources, Internal Governance, and Project Communications.

Alex is also the lead for the project's multi-program Implementation Advanced Planning Document (I-APD). In addition to submitting narrative updates for the I-APD, Alex is also responsible for updating the project's Cost Allocation Methodology (CAM), which follows the International Function Point Users Group's (IFPUG) Function Point Counting Practices Manual.

Prior to these roles, Alex was the lead resource coordinator, managing the day-to-day coordination of a 40+ member team. Alex had a variety of responsibilities, some of which included conducting daily meetings for team organization, providing oversight of the daily project coordination activities, developing process flows, prioritizing, and scheduling meetings to ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs), managing project Requests for Information (RFIs), and helping to ensure vendor accountability and adherence to SLAs.



TEKsystems Inc. (06/2016 to 09/2020)

- *Enterprise Account and Relationship Manager (06/2017 to 09/2020).*
Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of Traditional Software Development (SDLC and Agile), Cloud Enablement, Data Analytics, DevOps & Automation, and Digital Experience. Industries supported included Healthcare (Medicaid, IES, EMR, and Insurance), Pharmaceutical/Life Science, and State/Local Government.
- Alex is responsible for new account penetration to provide IT Project-based Services and IT Staffing Services and to Life Science and Pharmaceutical clients. This includes engaging new and existing customers through phone calls and meetings to promote TEKsystems as a valued partner for IT services such as deliverable-based professional services, workforce planning, and staff augmentation. He identifies new customers within a sales territory through research and networking to expand TEKsystems business opportunities; secures high-value accounts through consultative selling, effective customer solutions, and compelling business opportunities; and negotiates contracts and integrate contract requirements with business operations.

He is also responsible for relationship management, building relationships with clients to truly understand their business and analyze service growth opportunities. This has included leading the implementation of strategic business plans to address the needs of the customer to position TEKsystems as a service provider.
- *Recruiter (06/2016 to 06/2017).*
Alex utilized industry-leading recruiting practices to identify, attract, screen, and represent top IT professionals for contract, contract-to-hire, and direct placement opportunities at TEKsystems clients nationally.



Drew Thomas

Proposed Project Role	General Project Manager
Role at BerryDunn	Senior Consultant
Years of Experience Relevant to Proposed Role	21 years
Certifications and Education	Bachelor of Science in Health Science, Ball State University

Overview

Drew is a seasoned professional with 21 years of expansive Medicaid knowledge, including MCO contract compliance, member outreach, and enrollment, provider relations, policy, technical assistance, and trade association. Strong collaborative skills with experience working in both team and individual environments. Currently serving as an educational resource to Community Health Centers (CHCs) for reimbursement, general operations, and 340B.

Experience**BerryDunn (05/2022 to present).**

- **West Virginia Bureau for Medical Services (BMS) -**
 - *Mountain Health Promise Project (05/2022 to present)*
Drew serves as a SME for the Mountain Health Promise re-procurement where he assists the team with procurement planning and support. Drew provides support to the evaluation team by developing procurement evaluation training and assessment tools and participating in proposal review.
 - *Mountain Health Trust Sub-Project under the Technical and Program Support Phase IV Project (TAPS IV) (05/2022 to present)*
Drew serves as a SME for the Mountain Health Trust re-procurement where he assists the team with procurement planning and support. Drew provides support to the procurement planning team by researching the national managed care landscape to identify best practices. Drew also provides support to the evaluation team by developing procurement evaluation training and assessment tools and participating in proposal review.
 - *Public Health Emergency (PHE) Support: (05/2022 to present)*
Drew serves as the lead for the PHE Unwind Workgroup. Drew provides guidance to the team as they help to ensure eligibility protocols are implemented to unwind the pandemic-era processes for Medicaid



enrollment.

- **Organization Development (OD) Services Project (07/2022 to present)**
Drew is a Project Lead for the OD Service Project. Drew leads the project team activities that help BMS further develop a strengths-based executive strategy, establish a talent management strategy, and further support the use of BMS performance measures.

Indiana Primary Health Care Association (IPHCA) (05/2017 to 05/2022). Drew worked as a CHC Finance and Operations Manager to lead weekly and quarterly meetings that focus on increasing financial and operations solvency of health centers. He acted as a liaison between CHCs and various organizations, including but not limited to state and federal agencies and their contractors; represented the interests of CHCs at numerous functions, including state and federal initiatives, and conferences; and evaluated public policy and legislation at both the state and federal levels, advancing the mission of CHCs. Drew worked closely with Indiana's Family Social Services Administration/the Office of Medicaid Policy and Planning, federal health care agencies, Congress, and other advocacy organizations. He also analyzed the health care environment for potential fiscal and operational impact by programmatic and regulatory standards, oversaw grants and deliverables relating to technical assistance regarding state and federal contracts to ensure deadlines were met with quality results. Drew supported health center financial management and sustainability, value-based payment, and alternative payment methodologies with a focus on Indiana's Medicaid program, while monitoring the 340B environment and provides technical assistance specific to Indiana Medicaid rules. He managed a team of professionals including:

- Membership and Marketing Director
- Outreach and Enrollment Specialist
- Policy Specialist
- Resource and Development Program Director

Franciscan Alliance ACO (01/2012 to 04/2015). Drew served as the Medicaid Program Coordinator to compile quality reports and created physician scorecards for commercial and Medicaid lines of business. He oversaw Medicaid reporting for accuracy and compliance, managed member panels for Franciscan Alliance physicians by implementing and lifting panel holds and monitoring volume, and enrolled providers in applicable lines of business, Marketplace, Commercial, and Medicaid via contracting, ensuring accurate credentialing status, etc.

Office of Medicaid Policy and Planning (01/2008 to 12/2011). Drew served as a Policy Analyst to monitor Managed Care Organizations (MCOs) who were contracted with Medicaid to provide services to Hoosier Healthwise and HIP enrollees. He produced tools including vendor onsite feedback tool and onsite reporting tool used to assess best practices among vendors, created agendas, and led onsite, staff, and project meetings. He assisted with quantitative and qualitative evaluation and improvement of program processes and outcomes and acted as



liaison to other state and federal agencies, member advocate organizations, and health care provider associations. Drew researched and drafted written responses to inquiries raised by CMS, providers, members, legislators, and governor's office as well as participated in the development of Presumptive Eligibility (PE) and Open Enrollment and resolved technical and operational issues. He reviewed outgoing Hoosier Healthwise communication composed by MCOs for State and Federal compliance before publication.

Health & Hospital/Covering Kids & Families (02/2005 to 12/2007). Drew served as a Community Outreach Worker to enroll over 40 new Medicaid recipients per month. He increased the attendance of the Back-To-School Health Fair through grant writing and promotional activities to accommodate 12,000 (up from 3,000). He also represented Health and Hospital at various health fairs, coalition meetings, and other external and internal functions.

UnitedHealth Group (08/2001 to 02/2005). Drew worked as a Benefit Advocate who educated members and providers on Medicaid policy and protocol. He assisted members in the selection of Primary Medical Providers and acted as a liaison between members, providers, and Managed Care Organizations.



Liz Vose, MPA

Proposed Project Role	General Project Manager
Role at BerryDunn	Senior Consultant
Years of Experience Relevant to Proposed Role	11 years
Credentials and Education	Bachelor of Arts in French Literature and Language, Skidmore College Master of Public Administration in Finance & Information Management, Rockefeller College of Public Affairs & Policy

Overview

Elizabeth is a Senior Consultant with a strong understanding of state government oversight of Medicaid managed care compliance. She has 8 years' experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid initiatives.

Experience

BerryDunn (02/2022 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)*
Liz serves as Medicaid Managed Care Subject Matter Expert.
- *Mountain Health Trust (MHT) re-procurement project (09/2022 to present)*
Liz serves as Medicaid Managed Care Subject Matter Expert.

Mercer Government Human Services Consulting (04/2019 to 05/2021). Elizabeth worked as a Senior Government Consultant to assist state governments on a national scale in implementing Medicaid programs and stakeholder engagement initiatives. She established Medicaid compliance programs for states that comport with federal regulations, drafted and presented Requests for Proposals to secure funding for future contracts, and developed platform to assist state governments in tracking and trending compliance issues over time. She worked with Finance, Policy, Clinical and Operations teams to offer comprehensive consulting services for state governments.

NYS Office of Mental Health (12/2013 to 03/2019)

- *Director of Compliance and Communications (05/2015 to 03/2019).*
Elizabeth worked in the Division of Managed Care to oversee a team of



regulators on managed care plan compliance with Medicaid Model Contract. She oversaw Stakeholder Engagement activities including but not limited to public presentations, road shows, social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She liaised with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Interim Deputy Director prior to departure.

- ***Project Manager (12/2013 to 04/2015).***

Elizabeth managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked, and risks were communicated to executive staff as well as the Governor's office.

SUNY Albany (09/2011 to 12/2013). Elizabeth served as a Budget Analyst to manage Income Fund Reimbursable (IFR) accounts with net worth of \$9 million US dollars. She conducted fiscal analyses including running quarterly projections and year end activity reconciliation for a variety of accounts and funds and worked with account managers to identify and resolve fiscal inconsistencies.

HAVE Inc. (04/2007 to 08/2009). Elizabeth served as Accounts Payable Manager to process invoices, present payable activity to CEO, and manage credit card reconciliation process.

New York & Company (09/2002 to 08/2005). Elizabeth served as an Assistant Buyer responsible for skirts business. She monitored sales activities against projected on a daily, weekly, quarterly and annual basis and presented findings to CEO. She also worked closely with design, sourcing, and marketing to ensure trend right silhouettes hit the stores on time and generated targeted revenue.

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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	<p>Bachelor of Arts in Political Science and History, University of Maine at Farmington</p> <p>Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis</p> <p>Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis</p> <p>Certified Project Management Professional</p> <p>Prosci® Certified Change Practitioner</p> <p>Certified Lean Six Sigma Green Belt</p>

Overview

Ethan is a senior manager for our Government Consulting Group with progressive healthcare system experience across the breadth of the Medicaid enterprise. His specialties include 1115 and 1915(c) waivers, Medicaid state plans, federal health programs and legislation, health policy and program development, strategic planning, analysis, remediation, and implementation. An experienced project manager in both Medicaid HIT and policy projects, Ethan has engaged in leadership roles in projects designed to evaluate project, program, and provider performance. These efforts have been inclusive of providing support with determining the implications of, and advising on, federal regulation, design of waiver programs, data collection, managed care compliance, waiver evaluation design, and reporting requirements.

Experience

BerryDunn (07/2014 to present). Ethan has worked across practice areas for BerryDunn's Government Consulting group. Project highlights include the following.

- **West Virginia Bureau for Medical Services (BMS).**
 - *ARPA Section 9817: HCBS Implementation Project (5/2021 to present).*
Serving as program manager and lead, Ethan oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the American Rescue Plan Act (ARPA). The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased FMAP allowable by the ARPA



allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for West Virginia. The project continues in the implementation stage where Ethan leads workgroups, planning discussions and monitors controls execution of the implementation schedule

- *West Virginia Certified Community Behavioral Health Center Project (7/2021 to present)*

As portfolio Manager Ethan oversees a BerryDunn team working to create a new State Plan Amendment for West Virginia Medicaid to implement new and expanded health and behavioral health services. Specifically, CCBHCs are a specially designated clinic that provides a comprehensive range of mental health and substance use services.

- *ARPA Section 9813: Mobile Crisis Grant Project (7/2021 to present).*

Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the West Virginia Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, our team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.

- *State Plan Review and Support (SPRS) Project (03/2020 to present).*

To help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (state and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training state stakeholders on the new process flow.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 to 10/2021).*

As program manager, Ethan oversaw a team, which assisted DHHR in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project was to assist the DHHR with MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA



support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to present).*

As project manager, Ethan plans and executes the design, negotiation and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for CSED who are enrolled in the CSEDW program. The CSEDW permits WV to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.

- *Technical Assistance and Program Support Project (11/2018 to present).*
Serving as the overall program manager and subject matter expert Ethan oversees a project as which provides project management, subject matter expertise, and support activities for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake. Ethan and his team perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development.

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
Working as the lead policy analyst and subject matter expert for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD. Serving as the data management lead for phase 2 of the project, Ethan worked to design tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of West Virginia's program. Serving as program manager for phase 3 of the project, Ethan oversees the project manager and leads. In addition to ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to ensure quality program design.

- *Third Party Liability Options Analysis Project (07/2018 to 12/2018).*
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led



investigated both solution and financing alternatives for the State to conduct their Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

- *Gap Analysis and Project Management Services (10/2016 to 06/2018).*
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017).*
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a state-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 to 02/2016).*
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 to 12/2015).*
As business analyst, Ethan was brought in to organize and complete the final development of a state Medicaid agency project to develop a major RFP to select a utilization management vendor.
- **Delaware Division of Medicaid & Medical Assistance – Advanced Planning Document (APD) Consulting – (May 2021 to present.)**
As project manager, Ethan leads a team focused on helping the State of Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.
- **Puerto Rico Department of Health (PRDoH)– State Plan Support – (12/2020 to 10/2021)**
In order to support the Puerto Rico Medicaid Program (PRMP) Ethan served as a Subject Matter Expert for BerryDunn's state plan work. In this role, Ethan researched and analyzed the Medicaid state plan, drafted amendments, and reviewed state plan materials. Ethan's work included analyzing state plan provisions related to Hospital Based Presumptive Eligibility (HBPE), Modified Adjusted Gross Income (MAGI), and other major eligibility provisions of the State Plan.



- **Nebraska Department of Motor Vehicles – Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 02/2017).**
As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current state assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.
- **Michigan Department of Education – Early Childhood Data Governance Structure (03/2016 to 06/2016).**
As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.
- **West Virginia Bureau for Children and Families – Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016).**
Ethan served as interim project manager on a quality assurance project to oversee the implementation of an enterprise content management solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple state agencies, and facilitated a smooth implementation.
- **Colorado Department of Human Services (DHS) – Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 to 10/2014).**
Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.



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 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.



Megan Blount, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	MBA, University of Charleston BS, Communications, West Virginia State University

Overview

Megan is a highly efficient project coordinator, experienced in scheduling, time management, written and verbal communication, and collaboration with all levels of administrators, stakeholders, and community leaders. She is comfortable performing detailed and intricate tasks with a high degree of accuracy and confidentiality within a complex environment with tight, constantly shifting deadlines.

Relevant Experience**BerryDunn (04/2021 to present)**

- **West Virginia Bureau for Medical Services (BMS)**
 - *WV Organization Development Project (07/2022 to present)*
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.
 - *Data Improvement Project Phase II (06/2021 to present)*
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.
 - *Payment Error Rate Measurement Reporting Year 2023 Review Project (04/2021 to present)*
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.
 - *Third Party Liability Post-Implementation (01/2022 to 03/2022)*
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.
 - *Provider Management Support Project Phase II (11/2021 to 09/2022)*
Megan provides project coordination, deliverable development and review, and monitors risks and issues related to all sub-projects within PMS. Megan is involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.
 - *Third Party Liability Implementation Project (04/2021 to 06/2021)*
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.
 - *Fee Schedule and Edit Quality Review Project Phase IV (04/2021 to 12/2021)*



Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

- **Department of Health and Human Resources**

- *Public Health Emergency Support Project (12/2021 to present)*
Megan provides project coordination, deliverable development and review, and tracks action items. Megan is involved with the creation of the Communications Plan and has assisted in creating trackers in SharePoint Online for project documents.
- *Child Welfare Initiatives Phase III (12/2021 to 02/2022)*
Megan provided project coordination, deliverable development and review, and tracked action items, as needed.

West Virginia State Tax Department (10/2019 to 04/2021). As a tax analyst, Megan performs research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzes data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assists in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provides meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

Thyssenkrupp Elevator (TKE) (10/2018 to 01/2019). Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

West Virginia State University (06/2013 to 10/2018)

- **Assistant Director, International Affairs (01/2016 to 10/2018).** Megan worked with both degree-seeking and non-degree seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.
- **Assistant Director, Academic Educational Outreach (04/2014 to 01/2016).** Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program, and provided support to the WVSU Prison Initiative program.
- **Executive Secretary, Academic Affairs (06/2013 to 04/2014).** Megan served as the Liaison for Academic Policies Committee, WVSU Board of Governors; managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.



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

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

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

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

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



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 poor 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 cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and 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.



Alexandra (Alex) Glowacky, CAPM

Proposed Project Role	Project Management Support Staff
Role at BerryDunn	Consultant
Years of Experience Relevant to Project Role	5 years
Certifications and Education	CAPM certification (earned 08/2022) Bachelor of Arts in Sociology, Colby College (summa cum laude)

Overview

Alex is a highly motivated consultant with interests and experience in Medicaid program policy analysis, development, and implementation processes. She has worked on a range of Medicaid policy projects, bringing experience with 1115 Demonstration waivers, the State Plans and associated State Plan Amendment work, 1915c waivers, and planning grants. She has extensive knowledge in social systems, and offers a strong research, project management, and data synthesis skillset. Her strong communication skills paired with her organizational strategies that were developed through work in community organizations, have enhanced her leadership and project management knowledge base.

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

- **West Virginia Bureau for Medical Services (BMS)**
 - *Technical Assistance and Project Support (TAPS) Phase IV (05/2022 to present).* As the project manager of TAPS IV, Alex has provided oversight of subprojects and task requests approved and executed under the TAPS project umbrella. This includes coordinating and tracking task requests and subproject submission and approval processes, coordination with project leads on project status as a TAPS subproject and creating and delivering all TAPS project reporting documentation. Alex also coordinates and leads research and tasks that fall under the scope of TAPS, such as the review and impact analyses of CMS rules.
 - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2021 to present).* As a research analyst, Alex assists the State with activities specific to SUD waiver services in West Virginia. Her focus at present is supporting the State as BMS prepares to negotiate the SUD 1115 waiver renewal and expansion application, working on policy research and drafting efforts in preparation for the renewal. She additionally



supports the State's tracking of waiver monitoring and evaluation activities. Alex also supports project reporting for and assists with the general project management of the SUD project.

- *State Plan Review and Support (SPRS) Project Phases II and III (01/2022 to present)*. Working on the SPRS project, Alex assists with the drafting and development of State Plan Amendments (SPAs) and SPA submission packages. She additionally supports the State team working on State Plan submissions, tracking active SPAs and working closely with BMS to ensure SPAs move forward in public notice, submission, negotiation, and approval processes. Alex additionally manages the project reporting for and assists with the general project management of the SPRS project, creating and delivering the BMS team with Monthly Status Reports and related reporting documents.
- *Advanced Planning Document (APD) Support Project (10/2022 to present)*. Working on the APD Support Project, Alex supports the development of APDs to help ensure the state gets necessary funding for MITA aligned initiatives. Alex has contributed to the creation of several APDs, most recently having worked on the MMIS APD Update.
- *American Rescue Plan Section 9813: Mobile Crisis Grant Project (08/2021 to 08/2022)*.
As project coordinator and a policy analyst for the ARP Mobile Crisis project, Alex assisted the State in planning for the implementation of the Medicaid mobile crisis services program. She conducted program coordination among involved stakeholders, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the SPA draft for submission to CMS.
- *Children with Serious Emotional Disorder (CSED) Waiver Phase III Project (07/2021 to 06/2022)*. As a policy analyst for the CSED Waiver Project, Alex provided policy research and synthesis support for the State's initiative and contributed to the creation and revision of deliverables such as Waiver amendments, CMS Evidence Requests, and stakeholder engagement documentation.

Civic Engagement and Community Partnerships Committee (01/2021 to 07/2021).

Alexandra worked as a student advisor to collaborate in assessing and strengthening working relationships between Colby and local community organizations, developing and implementing engagement-building initiatives. She served as an ambassador for experiences focused on civic learning and democratic engagement.

Farnham Writers' Center (09/2018 to 07/2021). Alexandra worked as a head tutor, writing



fellow, and tutor to provide support for students and professors of writing-oriented courses, orchestrating opportunities for students to improve their writing skills. She maintained and enhanced the organization's social media presence on three media platforms. As Head Tutor for campus outreach/community events, she advocated for the organization as a resource, coordinated and ran staff meetings, and advised staff tutors.

Cambridge Women's Center (Winter 2019). Alexandra worked as a resource and research intern to investigate and network with other local social service organizations to update and revitalize the organization's resource guides. She trained in providing emotional support and relational assistance to trauma survivors.

**Carole Ann Guay**

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

Overview

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

Relevant Experience

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

- **Oregon Enterprise Technology Services (OR ETS) – Integrated IT Service Management (ITSM) (03/2018 to present).**
Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.
- **Colorado Office of the State Auditor – IT Evaluation (09/2017 to present).**
Carole Ann coordinates document request items, status reports, meeting requests, and data management.
- **New Mexico Corrections Department (NMCD) – COTS Offender Management System (OMS) Replacement (11/2016 to present).**
Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN – Information Security Program Development (05/2016 to present).**
For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.
- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**



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

- **Minnesota Health Benefit Exchange (MNSure) – Programmatic Audit (10/2015 to present).**
BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.
- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**
Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.
- **Webber Energy Fuels (2004 to 2014).** As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.



Megan Hamilton

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Arts in English, Kent State University Master of Arts in Literary and Cultural Studies, Carnegie Mellon University

Overview

Megan is an experienced editor with experience in corporate, research, and academic settings. She has a strong understanding of various citation styles as well as technical, journalistic, and academic editing.

Experience

BerryDunn (12/2022 to present). Megan will be working with the BerryDunn team in West Virginia to provide documentation support.

Fiverr (05/2022 to 12/2022). Megan served as a Freelance Editor and Proofreader on professional documents for clients.

Institute of Reading Development (05/2021 to 08/2021; 05/2022 to 12/2022). Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

Carnegie Mellon University (08/2021 to 05/2022). Megan served as a Research Assistant to gather and articulate research findings for a range of academic projects

Brainchild Literary Magazine (08/2020 to 05/2021). Megan served as Editor in Chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

Academic Success Center (08/2018 to 05/2021). Megan served as a tutor and as Program Assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.

Seglian Manufacturing Group (01/2012 to 01/2022 [seasonal]). Megan served as an administrative assistant, directly under Finance Director, to edit and update pertinent documents for ISO auditing and company records. She created Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



Alycia Minshall

Proposed Project Role	Project Management Support Staff
Role at BerryDunn	Editor
Years of Experience Relevant to Proposed Role	14 years
Certifications and Education	Bachelor of Arts in English, Alma College Master of Arts in English Language and Literature, Central Michigan University Poynter ACES Certificate in Editing

Overview

Alycia Minshall is an editing and communications professional with more than ten years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

Experience

BerryDunn (8/2022 to present). Alycia will be working with the BerryDunn team in West Virginia to provide documentation support.

Alycia Minshall Editing Services (3/2014 to present). Alycia provides editing services to clients across a variety of assignments, including poetry books, master's theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping to ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (4/2017 to 8/2021)

- *Senior Editor (6/2020 to 8/2021)*
As senior editor, Alycia wrote copy for various mediums, including websites, social media, landing pages, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; meeting notes; and more. She helped to ensure consistency in voice, brand, and tone across messaging channels, as well as helping to ensure that all materials are well written, accurate, properly researched, objective, concise, and focused. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.
- *Editor (4/2017 to 6/2020).* As an editor Alycia copyedited, proofread, and fact-



checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; and meeting notes. She helped to ensure that all materials are well written, accurate, properly researched, objective, concise, and focused, as well as helping to ensure consistency in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (9/2015 to 6/2016).

Alycia served as Learning Support Writing Coach, working collaboratively with graduate students on a variety of writing topics and assignments, including research papers, theses, and dissertations. She taught biweekly seminars on mastering APA style, writing with clarity, conducting research, and organizing writing assignments.

Central Michigan University Writing Center (8/2013 to 6/2014). Alycia served as the Writing Across the Curriculum Coordinator to develop and schedule more than 100 writing center orientations, writing workshops, and presentations across campus; topics covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (1/2012 to 6/2014). Alycia served as a graduate assistant to collaborate with students, staff, and faculty on writing assignments to improve clarity and organization. She conducted more than 1,000 writing sessions for undergraduates, graduates, and faculty, and served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (8/2008 to 12/2011)

- ***Student Director (8/2010 to 12/2011)***

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center and manage campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

- ***Writing Center Tutor (8/2008 to 12/2011).***

Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



Emily Hendrickson

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	22 years
Certifications and Education:	Bachelor of Arts in English Literature and Language, Gordon College Bachelor of Arts in Biblical and Theological Studies, Gordon College Poynter ACES Certified Editor

Overview

Emily is a published author and expert copywriter and editor with extensive experience reviewing business writing, catalog copy, and fiction and nonfiction manuscripts. She specializes in document quality assurance and editorial duties, working with clients across BerryDunn's areas of focus, including local government entities, higher education institutions, and state agencies.

Experience

BerryDunn (07/2017 to 06/2021, full-time; 06/2021 to present, per diem). Emily provides editorial and quality reviews of client deliverables such as IT strategic plans, feasibility studies, and assessment reports for the government consulting group. She supports BerryDunn consultants, offering content revision suggestions and ensuring that quality, style, and branding standards are met for all deliverables. She has developed and delivered numerous writing presentations focusing on best practices and addressing common business writing challenges.

Christianbook (06/2021 to present). As editor for the catalog copy department, Emily assigns and oversees writing for 12+ catalogs, and edits all advertising copy produced, revising content as needed for powerful sales messaging and target audiences. She also reviews catalogs throughout development stages, checking for internal consistency, accuracy, and incorporation of all reviewer comments. She was responsible for overhauling the department Style Guide and created training materials and process flows for new hires. To inspire creativity and continuously improve the copywriters' skills, she designs and presents monthly sessions to dissect elements of exceptional writing, highlight best practices, and address common errors.

Rose Publishing/Tyndale House (02/2021 to 12/2021). As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant content for tone, clarity, and structure and performed information-gathering to revamp text and fact-check quoted material.

Martin's Point Health Care (04/2016 to 07/2017). As a patient services representative, Emily



was responsible for queue management, including 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.

Youngclaus & Company (01/2016 to 04/2017). As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and ensured accurate electronic filing of both client and account documents in company database per standard workflow. She performed quality review of documents after scanning to confirm completeness of the electronic file.

Seacoast Christian School (09/2014 to 06/2015). Emily taught English and Creative Writing, adapted lesson plans to achieve short- and long-term educational objectives, and demonstrated classroom management skills while inspiring students to succeed.

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; printing and assembling reports; and maintaining paper and electronic filing. She was also responsible for graphic design work.

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



Hailey Holden

Assigned Project Role:	Project Management Support Staff
Role at BerryDunn:	Engagement Coordinator
Years of Experience Relevant to Proposed Role:	6 years
Education and Certification:	Bachelor of Arts in Psychology, Purdue University

Overview

Hailey is a leadership driven professional with more than 10 years' experience creating solution-focused, and collaborative partnerships in large volume and high stress situations. She is an excellent communicator with a passion for positive change who specializes in client-contractor coordination, personnel management, project management, event planning/marketing, recruitment, resource management, and process improvement.

Experience

BerryDunn (07/2022 to present). Hailey is currently serving as an Engagement Coordinator for the Medicaid Practice Group. She is responsible for updating and maintaining a variety of documents including master project trackers, funding trackers, and project timelines. She is collaborating with team members to develop, update, and/or maintain policies and procedures, firm and engagement templates, and documentation related to process improvements. She also collaborates with the resource coordinator(s), consultants, and project managers to create and process staffing requests to the WV client, as well as tracking the requests and approvals. Hailey also works alongside team members and the New Business Development team to create, update, and maintain resumes as it relates to staffing requests. She performs a variety of overflow project coordination duties, such as creating meeting agendas, taking meeting notes and making updates as needed, and documenting service level agreements.

El Paso County Department of Human Services (04/2021 to 07/2022). Hailey served as an Adolescent Lead Social Caseworker IV to provide over 2500 hours of intensive casework services to families and children yearly. She developed productive working relationships with clients, creating a collaborative partnership between team members and stakeholders; successfully identified the needs of clients to create and implement solution-focused plans of action; and ensured the successful completion of short- and long-term goals by monitoring and documenting progress. Hailey conducted research and investigation to ensure proper reporting, prosecution, and documentation of child abuse and neglect reports. She also performed assessments of new cases, referred clients to appropriate resources creating a substantial decrease in repeat infractions, and provided accurate updates and testimony in court hearings and mediations. She trained and supervised new caseworkers and acted in a supervisory role to members of the casework team.



Lake County CASA Program (04/2016 to 04/2021). Hailey served as a Lake County Court Appointed Special Advocate who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. She hosted and pioneered the recruitment, training, and management for over 100 community volunteers. Hailey also initialized and maintained the secure database to store documentation, and client demographic information. She compiled statistical data to best represent the organization allowing for a marked increase of both state and national grant funding. Additionally, she planned community outreach events, developed and implemented marketing plans for recruitment, and designed, created, and distributed marketing materials for the program including flyers, brochures, postcards, and other outreach items.

Second Chance for Pets Network (01/2015 to 01/2017). Hailey served as a Board Member to monitor animals in their respective foster homes, ensuring all needs were met. She evaluated business and fiscal plans to ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people. She also assisted in recruiting and training volunteers and conducted outreach to collaborate with local businesses to develop partnerships for raising funds.



Azba Hotelwala

Proposed Project Role	Project Management Support Staff
Role at BerryDunn	Project Support Staff
Years of Experience Relevant to Proposed Role	4 years
Certification and Education	Bachelor of Science in Kinesiology, Indiana University Certified Nurse Aide Basic Life Support Certification Home Health Aide Certification

Overview

Azba is a healthcare professional with experience in communications, patient care and management, and lab techniques. She has worked in public and private organizations with data and research, and to facilitate the proper care of patients and clients.

Experience

BerryDunn (May 2022 to present). Azba works as a Project Coordinator on the West Virginia Medicaid Enterprise Data Solution (EDS) Implementation and Certification project, the Medicaid Enterprise System (MES) Modernization Strategy and Procurement project, the Certified Community Behavioral Health Centers (CCBHC) State Plan Amendment (SPA) project, and the Medicaid Information Technology Architecture (MITA) project. As a project coordinator and business analyst for these projects, Azba assists in research and analysis, captures meeting notes, and supports the development of project deliverables.

LaSalle Network (01/2022 to 05/2022). Azba served as Recruiting Intern for the Healthcare Revenue Cycle Team to screen and evaluate 30-50 applications a day using CRM software to create a pool of qualified candidates for phone interviews. She conducted phone interviews to assess whether a candidate should be considered for advancement for healthcare roles. She communicated with job seekers daily to assess communication and technical skills, explain LaSalle's services, and pitch job opportunities.

Mother Hubbard's Cupboard (08/2018 to 05/2022). Azba served as an Advocate for Community Engagement to recruit service-learning courses at Indiana University to meet the needs of Mother Hubbard's Cupboard. She implemented and facilitated reflection sessions with students to encourage a meaningful volunteering experience and carried out annual survey's and CDBG forms to aid MHC in receiving proper funding.

IU Health Bloomington Hospital (06/2021 to 02/2022). Azba served as a Patient Care Technician in the Adult Medical Unit to monitor patients' vital signs, remain alert to any changes, and perform lab specimen collection procedures. She assisted patients with activities of daily living and collaborated with other staff to ensure patient comfort and to promote well-being.



University Elementary School (01/2021 to 06/2021). Azba served as an Assistant Health Aide COVID-19 data entry for the MCCSC school district and utilize first aid skills to assess and relieve student's needs.

Hoosier Home Health (03/2020 to 05/2021). Azba served as a Home Health Aide to assist disabled and geriatric patients with activities of daily living to facilitate independence and well-being. She remained alert to any health concerns of patients and responded promptly to keep patients in optimal health.



Jordan Ramsey, MA

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, Southeast Missouri State University Lean Six Sigma Green Belt Certification Poynter ACES Certified Editor

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 Illinoian (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.

**Jay Roudebush**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	5.5 years
Certifications and Education:	Bachelor of Arts in Political Science and History, Marshall University Master of Arts in Political Science, Marshall University

Overview

Jay is a consultant with extensive experience with government agencies, both in the public and private sectors. He is highly skilled in accounting, research, data analytics, budgeting, and forecasting. He is a detail-oriented problem solver and confident communicator with superior organizational and time management skills

Experience

BerryDunn (01/2023 to present). Jay is serving as a consultant working on multiple projects for West Virginia clients.

US Foods (01/2022 to 01/2023). Jay served as an Accounting Clerk II to complete payroll related activities in Workday including timekeeping review, maintenance, and pay calculations. He performed account related tasks including data entry, record retention, financial processing, and resolving accounting-related vendor issues. Jay also maintained communication and data between the central office and assigned sites.

Almost Havana (10/2014 to 01/2022).

- *Director of Operations and Acquisition (01/2019 to 01/2022).*

Jay managed the day-to-day operations of the business, including inventory control, product/supply ordering, customer relations, maintaining vendor accounts and industry relationships, sales forecasting, and data analysis. Her directed sales to customers via daily sales and through organized sales events.

- *Managing Partner (10/2014 to 01/2019)*

Jay maintained financial accounts and budgeting of the business. He managed day-to-day operations including inventory control, product/supply ordering, customer relations, maintaining vendor accounts and industry relationships, sales forecasting, and data analysis. He also directed sales to customers.

West Por Dios (08/2017 to 05/2020). Jay served as Managing Partner over inventory assets, product production, material acquisition, transportation logistics, and inventory analysis. He maintained vendor relations, collaborated to develop marketing initiatives to drive sales, including video production and marketing materials, and conducted events promoting the brand and its products.



Jon Watkins

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Criminal Justice, West Virginia University at Parkersburg

Overview

Jon is a Project Coordinator with BerryDunn with a history of working in high pressure, fast paced roles that require attention to detail, precise communication, and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors.

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

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 to present).*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon's work will help to ensure the State has a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.
 - *WV (West Virginia) Public Health Emergency (PHE) Support Project (12/2021 to present).*

Jon provides project coordination and monitors project risks and issues to assist the WV Department of Health and Human Resources with temporary flexibility that provides services to different beneficiaries during the Public Health Emergency. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objective.
- **West Virginia Bureau for Medical Services (BMS)**
 - *Mountain Health Trust (MHT) Re-Procurement Project (3/2022 to present).*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHT. Jon's work will help



to ensure the State has a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 to Present).*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MES MSP Project. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

- *WV Mental Health Parity Project (1/2022 to Present).*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

CAMC General Hospital (01/2021 to 11/2021). Jon worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing, and customer service. In addition, he organized the day-to-day needs of the unit and performed basic bookkeeping duties.

Greenhills Country Club (05/2012 to 12/2020). Jon worked in administration to schedule and organize golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day to day bookkeeping duties, and invoicing.

Jackson County 911 (01/2020 to 12/2020). Jon worked as a dispatcher to receive and dispatch all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



Jonathan Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Editor
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in English, Bowling Green State University

Overview

Jon is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and 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 Consulting Team, 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 Copyeditor (11/2010 to present). Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit 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 (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 spelling, and wrote copy for planning guides included with shipments.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Monthly status update
02	Monthly Status Report	Monthly status update
03	Schedule of APDs	Schedule of the APDs submission and related activities
04	APD Templates	Template documents for the various APDs and other supporting documents
05	APD Submission Package	<p>The APD submission package will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610. Each submission package includes:</p> <ul style="list-style-type: none">• Supporting Email Summary• Transmittal Letter• APD Narrative• MDBT• Consolidated MDBT• Current MITA SS-A Report
06	Updated APD Process	A process workflow developed for the State's APD process in 2019.
07	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
ACA	Affordable Care Act
APD	Advanced Planning Document
BMS	Bureau for Medical Services
C&S	Conditions & Standards
CFR	Code of Federal Regulations
CL	Commodity Lines
CMA	Central Master Agreement
CMS	Centers for Medicare and Medicaid Services
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EM	Engagement Manager
EPMO	Enterprise Project Management Office
FAST	Families Accessing Services through Technologies
FFP	Federal Financial Participation
GHS	Goold Health Systems
GPM	General Project Manager
HealthPAS	Healthcare Administrative Payer Solution
HIPAA	Health Insurance Portability and Accountability Act
IAPD	Implementation Advanced Planning Document
ICD-10	International Classification of Diseases, Tenth Edition
IT	Information Technology
IV&V	Independent Verification and Validation
LPM	Lead Project Manager
MDBT	Medicaid Detail Budget Table



MESC	Medicaid Enterprise Systems Community
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
NPI	National Provider Identifier
POS	Point of Sale
QA	Quality Assurance
SOW	Scope of Work
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
WVCHIP	West Virginia Children's Health Insurance Program

Extended Description:

THE VENDOR, BERRY DUNN MCNEIL & PARKER LLC, DBA BERRYDUNN, AGREES TO ENTER WITH THE AGENCY, WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, BUREAU FOR MEDICAL SERVICES, INTO AN OPEN-END CONTRACT FOR PROJECT MANAGEMENT ORGANIZATION (PMO) SERVICES PER THE SPECIFICATIONS, TERMS AND CONDITIONS, BID REQUIREMENTS, ADDENDUM 1 ISSUED 12/16/2020, ADDENDUM 2 ISSUED 01/07/2021, ADDENDUM 3 ISSUED 01/13/2021, ADDENDUM 4 ISSUED 01/14/2021, AND THE VENDOR'S BID DATED 01/28/2021, INCORPORATED HEREIN BY REFERENCE, AND MADE A PART OF HEREOF.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	80101600				0.000000
	Service From	Service To			
	2021-06-15	2024-06-14			

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
2	80101600				0.000000
	Service From	Service To			
	2021-06-15	2024-06-14			

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
3	80101600				0.000000
	Service From	Service To			
	2021-06-15	2024-06-14			

Commodity Line Description: Lead MMIS Project Manager: Base Year One

Extended Description:

Lead MMIS Project Manager: Base Year One

Hourly Rate: \$205.00

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
4	80101600				0.000000
	Service From	Service To			
	2021-06-15	2024-06-14			

Commodity Line Description: General Project Manager: Base Year One

Extended Description:

General Project Manager: Base Year One

Hourly Rate: \$175.00

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
5	80101600				0.000000
Service From		Service To			
2021-06-15		2024-06-14			

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

Extended Description:
Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
6	80101600				0.000000
Service From		Service To			
2021-06-15		2024-06-14			

Commodity Line Description: Lead Child Welfare Project Manager: Base Year One

Extended Description:
Lead Child Welfare Project Manager: Base Year One

Hourly Rate: \$205.00



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
Bureau for Medical Services

Jeffrey H. Coben, MD
Interim Cabinet Secretary

Cynthia E. Beane
Commissioner

TO: DHHR Finance
FROM: Lucinda Carroll *lc*
Procurement Specialist, BMS Procurement Services
DATE: April 11, 2023
RE: PF1211003, CDO BMS23*31 Funding Memo

The West Virginia Bureau for Medical Services (BMS) respectfully submits this funding memo related to the above-referenced CDO.

The service period will be 05/01/2023 through 06/14/2024 and we anticipate payment to be split between SFY24 and SFY25 per the table below:

CDO BMS23*31		
APD Project 05/01/23-06/14/24		
	PR07 SFY24 5/1/23-4/30/24	PR07 SFY25 5/1/24-6/14/24
EM	\$17,550.00	\$4,050.00
LPM	\$36,980.00	\$6,020.00
GPM	\$930,300.00	\$154,700.00
SS	\$192,000.00	\$32,000.00
Sub-total	\$1,176,830.00	\$196,770.00

Total: \$1,373,600.00

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 304-352-4235 or lucinda.l.carroll@wv.gov.



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
Bureau for Medical Services

Jeffrey H. Coben, MD
Interim Cabinet Secretary

Cynthia E. Beane
Commissioner

TO: Robert L. Price, CPPO, CPPB, NIGP-CPP
Administrative Services Manager II
WV DHHR Office of Purchasing

FROM: Lucinda Carroll *LC*
Procurement Specialist, BMS Procurement Services

DATE: April 7, 2023

RE: PF1211003, CDO BMS23*31

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 Advanced Planning Document (ADP) Consulting Services. The total cost is not to exceed \$1,373,600.00. The service period will be 05/01/2023 – 06/14/2024.

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 304-352-4235 or lucinda.l.carroll@wv.gov.

Agreed

Heather White