



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: 03-24-2023

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 BMS2300000029 1	Procurement Folder:	1199060
Document Name:	Technical Assistance and Program Support (TAPS) Project Ph V	Reason for Modification:	
Document Description:	Technical Assistance and Program Support (TAPS) Project Ph V		
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: \$1,498,800.00

Purchasing Division's File Copy

ENTERED

CH 5/2/23
PURCHASING DIVISION AUTHORIZATION
DATE: *Turabelle 5/3/2023*
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: *Beverly Foles 5-3-2023*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Technical Assistance and Program Support (TAPS) Project Phase V

Dates of Service: 07/01/2023 - 06/14/2024

Total \$1,498,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$23,220.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-07-01	2024-06-14				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 108 Hours @ 215 = \$23,220

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$15,660.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-07-01	2024-06-14				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 58 hours @ \$270 = \$15,660

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$220,080.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-07-01	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 400 Hours @ \$80 = \$32,000

Nolan Cry 400 Hours @ \$80 = \$32,000

Alexandra Glowacky 905 Hours @ \$80 = \$72,400

Azba Hotawala 400 Hours @ \$80 = \$32,000

Krista Clay 400 Hours @ \$80 = \$32,000

Alycia Minshall, Caitlin Cabral, Emily Hendrickson, Janine DiLorenzo, Jon Williams, Jordan Ramsey, Karla Fossett and Megan Hamilton 246 Hours @ \$80 = \$19,680

Total 2,751 Hours @ \$80 = \$220,080

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,239,840.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-07-01	2024-06-14				

Commodity Line Description: General Project Manager: Base Year Three

Extended Description:

General Project Manager: Base Year One

Hourly Rate: \$180.00

Change Order 2: Pricing effective 06/15/2023.

Ethan Wiley 315 Hours @ \$180 = \$56,700
Susan Chugha 315 Hours @ \$180 = \$56,700
Peter Alfrey 315 Hours @ 180 = \$56,700
Maggie Anderson 315 Hours @ \$180 = \$56,700
Dot Ball 315 Hours @ \$180 = \$56,700
Julie Bandy 315 Hours @ \$180 = \$56,700
Lloyd Butler 315 Hours @ \$180 = \$56,700
Andrea Clark 315 Hours @ \$180 = \$56,700
Kristan Drzewiecki 315 Hours @ \$180 = \$56,700
Chris Fanikos 315 Hours @ \$180 = \$56,700
Alex Fowler 315 Hours @ \$180 = \$56,700
Valerie Hamilton 315 Hours @ \$180 = \$56,700
Danielle Joslyn 315 Hours @ \$180 = \$56,700
Brody McClellan 315 Hours @ \$180 = \$56,700
Arisara Miller 315 Hours @ \$180 = \$56,700
Dina Nash 315 Hours @ \$180 = \$56,700
Tonya Roloson 315 Hours @ \$180 = \$56,700
Nicole Spears 315 Hours @ \$180 = \$56,700
Jeffrey Stoddard 315 Hours @ \$180 = \$56,700
Dawn Webb 273 Hours @ \$180 = \$49,140
Ryan Wrisley 315 Hours @ \$180 = \$56,700
Fei Zou 315 Hours @ \$180 = \$56,700

Total 6,888 Hours @ 180 = \$1,239,840.00



February 7, 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 continued support for the Technical Assistance and Program Support (TAPS) Project Phase V under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 12 months. BerryDunn agrees to a SOW start date effective July 1, 2023.

Assuming a start date of July 1, 2023, the work would then conclude on June 14, 2024, in alignment with the end date of this contract.

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

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

Best Regards,

Nicole G. Becnel

Nicole Becnel
Principal
681-313-8905

Robert Price
Agree



Staffing Plan and Statement of Work (SOW) for the
West Virginia Bureau for Medical Services (BMS)
Technical Assistance and Program Support (TAPS): Phase V Project
Prepared for HHR #21*03



Submitted by:

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

Submitted on:

February 7, 2023



Staffing Plan and Statement of Work (SOW) for the West Virginia Bureau for Medical Services (BMS) Technical Assistance and Project Support (TAPS): Phase V Project

This SOW's intent is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the Technical Assistance and Program Support (TAPS) Phase V Project. The SOW describes the tasks BerryDunn will perform to assist the Bureau for Medical Services (BMS) in providing business analysis and program support. Phase V is similar to Phases III and IV, as it is designed to continue project management support of open subprojects. In addition, Phase V will provide ongoing technical support and assistance activities for new initiatives outlined and/or requested by BMS throughout the duration of the project.

Overview

As part of the TAPS Phase V Project, BerryDunn will provide project management, subject matter expertise, and support activities for the design, development, and implementation (DDI) of multiple Medicaid business initiatives and activities that BMS might undertake during this SOW's period. BerryDunn may perform services including program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development, as requested by the BMS team.



1.0 Key Information

The West Virginia (State) Department of Health and Human Resources (DHHR) has requested BerryDunn to provide ongoing project management services and subject matter expertise. These services will continue to support the TAPS Phase V Project's goal of providing project management, subject matter expertise, and program support.

- BMS Commissioner Cynthia Beane will serve as project sponsor. Commissioner Beane or her designee will sign off on deliverables.
- Deputy Commissioner Sarah Young will serve as the primary State point of contact for the project.
- This work is projected to be completed within 12 months of project initiation.
- The BerryDunn leadership team will consist of Eduardo Daranyi and Ethan Wiley, with both providing project oversight. Alexandra (Alex) Glowacky will provide project management.

The TAPS V Project is expected to support BMS in achieving Medicaid Information Technology Architecture (MITA) alignment in the following areas:

- Gen 1.0 – Improve the State's effectiveness and efficiency
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations
- Plan Management (PL) Business Area
- Conditions and Standards – Business Results Condition, Industry Standards Condition, Interoperability Condition, Leverage Condition, Modulatory Standard

Assumptions

BerryDunn made the following assumptions in preparing this SOW:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be brought to the attention of the DHHR project sponsor.
- BerryDunn will provide deliverables in an agreed-upon format.
- BerryDunn recognizes that external factors, such as stakeholder involvement, might impact project timeline. BerryDunn will work with the State project manager and State project lead to mitigate any such issues.
- The estimated number of hours reflected in the SOW assumes that BerryDunn will initiate no more than 10 projects as part of subproject management (outlined in Section 2.0 of this document).

Funding

BMS intends to utilize the Medicaid Management Information System (MMIS) Implementation



Advanced Planning Document (IAPD) WV-2022-09-22-MMIS-APDU-MITA —approved on November 8, 2022—for total state and federal funds in the amount of \$110,454,039 as well as related unique project identifiers (UPIs) for the purposes of this SOW. The estimated cost of the services to be delivered under this SOW is \$1,498,800.00, included in the approved APD. Therefore, any additional scope added to the proposed services under this SOW may require the State to update its MMIS IAPD and allocate additional funds for project management.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting the work; and lists the estimated hours for completion of each key task. A **deliverable** requires formal submission and approval; an **artifact** is a BerryDunn-produced document that serves as an input to one or more deliverables but might not be formally submitted for State feedback (unless requested). A high-level timeline for the activities described below is provided in Section 5.0.

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

Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Est. Hours
1.0	Engagement Oversight <u>Proposed Service Approach</u> <ol style="list-style-type: none">1. Ongoing Oversight – BerryDunn's project leadership will regularly meet with the State project sponsor/manager to discuss project status and issues affecting timely completion of work, and oversee BerryDunn staff, services, and quality assurance (QA) of deliverables.2. Monthly Commissioner Briefing – Project status updates will be included in the existing Monthly Commissioner Briefing Report. <u>Deliverables</u> D01: Monthly Commissioner Briefing	Nicole Becnel Eduardo Daranyi Ethan Wiley	400
2.0	Project Initiation, Execution and Control <u>Proposed Service Approach</u> <ol style="list-style-type: none">1. Provide monthly status updates in the form of a Monthly Status Report.2. Coordinate and facilitate project team meetings as necessary.3. Coordinate and facilitate meetings with the BerryDunn project team.4. Manage project action items, risks, and issues. <u>Deliverables</u> D02: Monthly Status Report D03: Decision Log D04: Risk and Issues Log D05: Action Items Log	Alex Glowacky Susan Chugha Ethan Wiley	1,005
3.0	Support for Medicaid Business Initiatives	Alex Glowacky	4,000



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Est. Hours
	<p>As part of the TAPS Phase V Project, BerryDunn may provide support activities for the DDI of multiple Medicaid business initiatives and activities that BMS will undertake during the period of this SOW.</p> <p><u>Proposed Service Approach</u></p> <ol style="list-style-type: none">Policy and Program Research – Review, analyze, and provide subject matter expertise to support successful policy and program operation and transformationFinancial Analysis and Modeling – Assist with designing, developing, and implementing healthcare reform, including financing and funding strategiesRegulatory Analysis – Evaluation, planning, and analysis related to opportunities from state and federal regulatory changes to Medicaid, which could include existing, new, and/or proposed regulationsWaiver Design, Modification, and Implementation – Designing, developing, financing, implementing, or modifying new Section 1115 waivers and 1915 waivers or supporting existing waiver programsFederal and Stakeholder Negotiation – Consultation and guidance on strategies and potential responses during negotiations, as well as facilitating meetings with the Centers for Medicare & Medicaid Services (CMS) and other federal or state stakeholders <p><u>Artifacts</u></p> <p>A01: Impact assessments</p> <p>A02: Waiver materials</p> <p>A03: Materials to support federal negotiation</p>	<p>Susan Chugha</p> <p>Ethan Wiley</p> <p>Peter Alfrey</p> <p>Maggie Anderson</p> <p>Dot Ball</p> <p>Julie Bandy</p> <p>Lloyd Butler</p> <p>Andrea Clark</p> <p>Kristan Drzewiecki</p> <p>Chris Fanikos</p> <p>Alex Flower</p> <p>Valerie Hamilton</p> <p>Danielle Joslyn</p> <p>Brody McClellan</p> <p>Arisara Miller</p> <p>Dina Nash</p> <p>Tonya Roloson</p> <p>Nicole Spears</p> <p>Jeffery Stoddard</p> <p>Dawn Webb</p> <p>Ryan Wrisley</p> <p>Fei Zou</p> <p>Megan Blount</p> <p>Nolan Cyr</p> <p>Azba Hotawala</p> <p>Krista Clay</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Emily Hendrickson</p> <p>Janine DiLorenzo</p> <p>Jon Williams</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Megan Hamilton</p>	
4.0	<p>Subproject Management Program Support</p> <p><u>Proposed Service Approach</u></p>	<p>Alex Glowacky</p> <p>Susan Chugha</p> <p>Ethan Wiley</p>	4,000



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Est. Hours
	<ul style="list-style-type: none">▪ Project Management – Ongoing planning, monitoring, executing, and reporting of subprojects and ad hoc tasks in accordance with project management best practices.▪ Ad Hoc Support – Respond to ad hoc requests as needed. <p><u>Artifacts</u></p> <p>A04: Subproject Management Materials</p>	Peter Alfrey Maggie Anderson Dot Ball Julie Bandy Lloyd Butler Andrea Clark Kristan Drzewiecki Chris Fanikos Alex Flower Valerie Hamilton Danielle Joslyn Brody McClellan Arisara Miller Dina Nash Tonya Roloson Nicole Spears Jeffery Stoddard Dawn Webb Ryan Wrisley Fei Zou Megan Blount Nolan Cyr Azba Hotawala Krista Clay Alycia Minshall Caitlin Cabral Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Megan Hamilton	
5.0	<p>Project Closeout</p> <p><u>Proposed Service Approach</u></p> <p>1. Project Closeout Summary – One month prior to the completion of the SOW service dates, begin to prepare a Project Closeout</p>	Alex Glowacky Susan Chugha Ethan Wiley	400



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Est. Hours
	<p>Summary to document the work performed related to this SOW. The summary will provide the final status of deliverables, action items, issues, decisions, and risks.</p> <p>2. Transition – Transition project materials to the project sponsor or their designee</p> <p><u>Deliverables</u></p> <p>D06: Project Closeout Summary</p> <p><u>Completion Criteria</u></p> <p>The Project Closeout Summary will be deemed complete upon signature acceptance by the BMS project sponsor or their designee.</p>		
Total Hours			9,805
Total Not-to-Exceed Cost Estimate			\$1,498,800



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and cost by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 3 in the Contract Master Agreement #HHR21*03.

Table 2: Project Resources

CL Year 3	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
14	EM	\$270	Nicole Becnel	58	\$15,660
13	LPM	\$215	Ed Daranyi	108	\$23,220
16	GPM	\$180	Ethan Wiley	315	\$56,700
16	GPM	\$180	Susan Chugha	315	\$56,700
16	GPM	\$180	Peter Alfrey	315	\$56,700
16	GPM	\$180	Maggie Anderson	315	\$56,700
16	GPM	\$180	Dot Ball	315	\$56,700
16	GPM	\$180	Julie Bandy	315	\$56,700
16	GPM	\$180	Lloyd Butler	315	\$56,700
16	GPM	\$180	Andrea Clark	315	\$56,700
16	GPM	\$180	Kristan Drzewiecki	315	\$56,700
16	GPM	\$180	Chris Fanikos	315	\$56,700
16	GPM	\$180	Alex Flower	315	\$56,700
16	GPM	\$180	Valerie Hamilton	315	\$56,700
16	GPM	\$180	Danielle Joslyn	315	\$56,700
16	GPM	\$180	Brody McClellan	315	\$56,700
16	GPM	\$180	Arisara Miller	315	\$56,700
16	GPM	\$180	Dina Nash	315	\$56,700
16	GPM	\$180	Tonya Roloson	315	\$56,700
16	GPM	\$180	Nicole Spears	315	\$56,700
16	GPM	\$180	Jeffery Stoddard	315	\$56,700
16	GPM	\$180	Dawn Webb	273	\$49,140
16	GPM	\$180	Ryan Wisley	315	\$56,700
16	GPM	\$180	Fei Zou	315	\$56,700
16	SS	\$80	Megan Blount	400	\$32,000



CL Year 3	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
16	SS	\$80	Nolan Cyr	400	\$32,000
17	SS	\$80	Alexandra Glowacky	905	\$72,400
17	SS	\$80	Azba Hotawala	400	\$32,000
17	SS	\$80	Krista Clay	400	\$32,000
17	SS	\$80	Alycia Minshall Caitlin Cabral Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Karla Fossett Megan Hamilton	246	\$19,680
Total Hours:				9,805	\$1,498,800



4.0 Project Hours and Costs Per Month

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

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	5	9	574	230	818	\$125,005
Month 2	5	9	574	230	818	\$125,005
Month 3	5	9	574	229	817	\$124,925
Month 4	5	9	574	229	817	\$124,925
Month 5	5	9	574	229	817	\$124,925
Month 6	4	9	574	229	816	\$124,655
Month 7	4	9	574	229	816	\$124,655
Month 8	5	9	574	229	817	\$124,925
Month 9	5	9	574	229	817	\$124,925
Month 10	5	9	574	229	817	\$124,925
Month 11	5	9	574	229	817	\$124,925
Month 12	5	9	574	230	818	\$125,005
Total	58	108	6,888	2,751	9,805	\$1,498,800



5.0 High-Level Timeline

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

Table 4: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12
1.0 Engagement Oversight												
2.0 Project Initiation, Execution, and Control												
3.0 Support for Medicaid Business Initiatives												
4.0 Subproject Management Program Support												
5.0 Project Closeout												

**BerryDunn Authorized Signature**

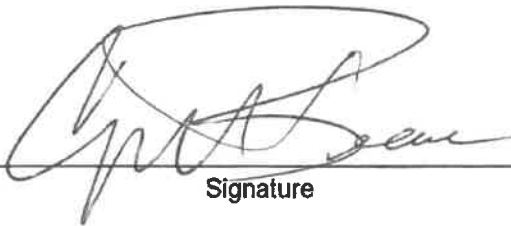
As a principal of this firm in our Medicaid Practice Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to the DHHR will be for actual hours expended, which might or might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



Signature

February 7, 2023

Date

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

Signature

2/22/23

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 Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.
- *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
Nicole was the Lead Project Manager overseeing the team, assisting the State



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

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

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

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

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

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

Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the 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) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014)*
- *Provider Enrollment (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).**
As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

Project Manager for MIHMS Provider Enrollment. Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex



configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.

West Virginia MMIS. Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.

Contract Configuration and Reports Lead for West Virginia MMIS. Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.

- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

Presentations

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

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

**Eduardo Daranyi, MEd, PMP®**

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

Overview

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

Experience

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

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



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

- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to present).*
Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.
- *People's Access to Help (PATH) DDI Project Management (10/2017 to present).*
Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget neutrality, future technology procurements to support the



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

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

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

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

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

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

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



- Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:
 - *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)*
 - *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)*
 - *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
 - *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 to 05/2020)*
 - *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
 - *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*
 - *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)*
 - *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*
 - *Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
 - *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
 - *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
 - *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
 - *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
 - *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*



- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*
- **West Virginia Department of Health and Human Resources (DHHR) (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.
- **Maine Department of Health and Human Services (DHHS) – 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 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 toward the future and MESC 2020: Where we are today and where we will be tomorrow.

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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager (employed by BerryDunn since 07/2014)
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis BA, Political Science and History, University of Maine at Farmington Certified Project Management Professional® Prosci® Certified Change Practitioner Certified Lean Six Sigma Green Belt

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 waivers, 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.

Relevant 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).**
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 to present).*
As program manager, Ethan oversees a team, which assists DHHR in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project is 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.
- **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 substitute 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 child care tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.

University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014). As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013). As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

The Cutler Institute for Health and Social Policy (11/2012 to 01/2013). Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and state plan amendments, performing literature reviews, and assisting with general research.

**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 subcontractors. 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 of the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

- *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 subprojects 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, note-taking, 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 U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

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

- **Project Specialist – Assistant Vice President**
 - 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 U.S. 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.

**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 multifaceted 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

**Maggie Anderson, MS**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert
Years of Experience Relevant to Proposed Role:	32 years
Certifications and Education:	Bachelor of Science in Food and Nutrition, North Dakota State University Master of Science in Management, University of Mary

Overview

Maggie has more than 30 years' experience working in state government with federally funded programs for social services and nutritional programs. She has demonstrated experience as the director of divisions with the ability to oversee and administer department and division development and growth.

Experience

BerryDunn (12/2021 to present). Maggie serves as a Subject Matter Expert (SME) with the Medicaid projects in West Virginia and Puerto Rico. As a SME, she researches policy issues, including State Medicaid Director Letters, proposed regulations and other federal guidance documents and prepares summaries of the relevant information for the client. In addition, she drafts Medicaid state plan amendments and reviews amendments prepared by other team members. Maggie also participates in team meetings and client meetings, including clients meetings with the Centers for Medicare and Medicaid Services, and is able to share information, expertise and perspective from her years of service as a Medicaid Director.

North Dakota Department of Human Services (08/2005 to 05/2019). Maggie worked as the Director of Medical Services Division responsible for the administration of the Medicaid Program, Medicaid Expansion, the Children's Health Insurance Program and Autism Spectrum Disorder services. She also served in the dual capacity as both Executive Director and Medicaid Director from August 2012 to December 2016. As the Executive Director, Maggie was responsible for all programs within the umbrella agency: Medicaid; the Children's Health Insurance Program; Economic Assistance Programs including Child Care Assistance, the Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families (TANF), and the Low Income Home Energy Assistance Program; Child Support; Aging Services; Children and Family Services; Vocational Rehabilitation; Developmental Disabilities Services; Behavioral Health Services; and Field Services which includes the State Hospital, the Developmental Center, and eight regional human service centers.

North Dakota Department of Human Services (02/2003 to 08/2005). Maggie served as the Deputy Director of Medical Services to assist the Division Director with program administration and budget development and oversight. She served as the business lead for the work leading up to the procurement of a Medicaid Management Information System.



North Dakota Department of Public Instruction (08/1989 to 02/2003). Maggie administered the United States Department of Agriculture (USDA) Child Nutrition Programs in the Department of Public Instruction. She was responsible for the administration and oversight of the various USDA Child Nutrition Programs. Maggie was hired as a Child Nutrition Specialist and was promoted to Assistant Director during tenure.

**Dorothy (Dot) Ball, BA**

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

Overview

Dot is a senior consultant with over 30 years of professional experience working in state and Federal government, nonprofit and for-profit health services, healthcare policy, health information technology, clinical and direct service healthcare business, medical business management, professional education, and online education technologies. She is an experienced public policy expert, business operations, and regulatory analyst with subject matter expertise in Healthcare Reform – Affordable Care Act, Health Information Technology (HIT), Health Information Exchange technology and governance structures, Medicaid business process modeling, MITA, regulatory compliance and quality, HIPAA, health professional workforce training and eLearning technologies. She participates in state and national healthcare transformation initiatives including health reform, Health Level 7 (HL7), Medicaid Information Technology Architecture (MITA), National Health Information Network (NHIN), Electronic Health Records Adoption (EHR), and Health Information Exchange (HIE) projects and workgroups.

Experience



POGIS Consulting LLC/Dorothy A Ball Consulting (06/2009 to present). As principal consultant for this small veteran-owned analytics and subject matter consultancy, Dot focuses on providing services in the areas of health IT, healthcare delivery systems, and government-funded health and human services.

BerryDunn (06/2009 to present)

West Virginia DHHR

Electronic Data System (EDS) Project (09/2018 to present)

Dot serves as Business Analyst/Subject Matter Expert currently serving as the Project Training Lead and supporting the Testing and Certification teams. She previously supported the Data Visioning & Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development, and the Certification team for the Procurement Assistance Project.

- *West Virginia Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 to present)*
Dot serves as Business Analyst / Subject Matter Expert supporting the Deliverables Review team for the West Virginia Project Management Services
- *MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 to present)*
Dot serves as MITA Subject Matter Expert/Analyst.
- *Affordable Care Act Compliance and Implementation Project (05/2010 to 12/2013)*
Dot served as Lead Policy Analyst
- *State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 to 10/2010)*
Dot served as Business Analyst
- **Puerto Rico Medicaid Program – Puerto Rico Medicaid Management Information Systems (MMIS) Enterprise Objective Monitoring and Control Services (08/2020 to 09/2021)**
Dot served as MITA Subject Matter Expert/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise Key Performance Indicators (KPI) Set/Guide.
- **West Virginia Bureau for Medical Services – Medicaid Enterprise Gap Analysis and Project Management Services (GAPMS) Project (11/2016 to 03/2018)**
Dot served as Policy Analyst and Affordable Care Act subject matter expert.
- **Arizona Health Care Cost Containment System (AHCCCS) – Testing Experience and Functional Tools in Community-Based Long-Term Services and Supports (TEFT) Grant PHR Assessment project (07/2014 to 09/2014)**
Dot served as Business Analyst/Subject Matter Expert



- **Massachusetts State Medicaid - Health IT Plan and EHR Incentive Payment Program (10/2010 to 01/2011).**
Dot served as Business Analyst.

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

Consulting roles and projects include:

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

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

- Business Analyst for the Arizona Health Care Cost Containment System (AHCCCS) MITA Analysis Project. Performs business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, develops As Is and To Be Assessments, data collection surveys, documentation review, plans and facilitates validation sessions, performs quantitative and qualitative gap analysis and documentation, develops solutions transition and sequencing plan MITA strategic Roadmap.
- Lead Business Analyst for AHCCCS Fee for Service Management Division (FSM) MITA Assessment managed MITA business analysis team.
- Lead Business Analyst for AHCCCS and Department of Economic Security (DES) to initiate Phase I of the State of Arizona Technology Interface Project System (TIPS).
- Lead Business Analyst managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third Party Administrator Transition and System Implementation project managed requirements development team.



- Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS), member of HIPAA privacy policy compliance team assessments.
- Lead Business Analyst Indiana MITA Analysis project. Performs business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, develops As Is and To Be Assessments, web enable documentation request surveys using Survey Monkey, plans and facilitates validation sessions, and documentation review, develops solutions transition and sequencing plan MITA strategic Roadmap.
- Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development and Implementation project.
- Senior Policy Analyst for South Dakota HIPAA Security Policy and Procedures compliance project. Performs policy and procedures gap analysis of existing Department and State Information Technology authority documentation.
- Business Analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework. This was among the first MITA assessments performed.
- Policy Analyst providing support to the Centers for Medicare and Medicaid Services (CMS) Medicaid Information Technology Architecture (MITA) Initiative Team. Provides policy guidance for the development of MITA Business Model and MITA Assessment tools. Participates in MITA framework development workgroups and MITA Medicaid Management Information System (MMIS) reshaping efforts including HL7 Financial Management workgroup. Familiar with most aspects of the framework and technical specifications.
- Business Analyst/Subject Matter Expert for Washington State Medicaid MMIS procurement project.

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

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

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

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

Analyzing and interpreting state and federal laws and regulations

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

Developing data collection tools and survey instruments



Conducting comparative health data analysis

Responding to legislative requests and mandates

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

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

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

**Julie Bandy**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Science in Social and Behavioral Sciences, Indiana University

Overview

Julie is an experienced health and management professional with more than 20 years' experience working with Medicaid policy and planning, case management programs, and report analyses. She has worked in both private and public sectors and specializes in Medicaid waiver projects, community support programming, and eligibility.

Experience**BerryDunn (12/2022 to present)**

- **West Virginia Bureau for Medical Services (BMS) – ARPA HCBS Implementation Project (12/2022 to present).**
Julie will serve as a General Project Manager on this project.
- **West Virginia BMS – Medicaid Enterprise Modernization Strategy and Procurement Project (12/2022 to present).**
Julie will serve as a General Project Manager on this project.

Indiana Division of Mental Health and Addiction (05/2013 to 12/2022). Julie served as a Youth Provider Specialist working on Care Select Reporting Analyst, Care Programs, Office of Medicaid Policy & Planning, FSSA; DDRS Waiver Policy and Compliance Specialist, Office of Medicaid Policy & Planning, FSSA.

Arbitre Consulting, Inc (06/2008 to 06/2010). Julie served as an Evaluator with ICAP Assessments and worked on Level of Care for Indiana Medicaid Waiver programs. She conducted ICAP assessments and health/behavioral appendix as well as serving as a member of reevaluation team for assessments needing additional review.

Jacobs Home, Inc (12/2005 to 10/2007). Julie served in multiple roles at Jacobs Home, a Medicaid approved and enrolled 501c3 agency providing residential and community supports for adults with autism and other developmental disabilities.

- *Executive Director (05/2006 to 10/2007)*
- *Assistant Director (12/2005 to 05/2006)*

Sycamore Rehabilitation Services (06/2003 to 11/2005). Julie served in multiple roles at Sycamore Services, a CARF accredited, 501c3 agency providing Medicaid-funded home and community-based support services to adults with autism and other developmental disabilities



- *Director, Case Management Services (10/2004 to 11/2005)*
- *Director, Morgan County Adult Services (09/2003 to 10/2004)*
- *Targeted Case Manager (06/2003 to 09/2003)*

Independent Case Management (03/2002 to 06/2003). Julie served as a Targeted Case Manager for individuals receiving Medicaid 1915 (c) waiver services transitioning from State operated facilities.

Professional Assessment of Indiana, Inc. (04/2000 to 10/2001). Julie served as a Diagnostic and Evaluation IDD Clinician to determine level of care eligibility for individuals seeking or receiving Medicaid-funded services in group home and waiver settings.

**Lloyd Butler**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Bachelor of Science, Mathematics/Computer Science, Ithaca College Master of Science, Mathematics, Northeastern University

Overview

Lloyd is an organized IT professional with diverse experience, including cybersecurity, efficient programming, process and project management, who enjoys designing and orchestrating a shared vision.

Skills

Applications: SQL Server Management Studio, SQL Server Integration Studio, Sisense, Git, Asana, Jira®, Slack, Okta, SharePoint, Microsoft Office, Microsoft Visual Studio

Languages: SAS, SQL, Python, Bash, PL/SQL, Perl, JavaScript, CSS, HTML, XML, VBScript (Active Server Pages), Visual Basic, VB for Applications, Java, C++, C#

Experience

BerryDunn (12/2020 to present). Lloyd works with clients to improve their workflows and quality of work. Given existing applications, he finds ways to increase their efficiency and complete their original vision. This requires teasing out business requirements, analyzing data, understanding quality needs, as well as designing and implementing the solution. Lloyd deftly moves between various tools to complete these ends, including SQL Server, Oracle, and SAS.

High Value Healthcare Collaborative (HVHC) (04/2013 to 12/2020)

- **Infrastructure Manager.** As the senior manager of IT operations, Lloyd was responsible for server environment stability and security. He served as the technical liaison to data centers (Dartmouth College, Rackspace); maintained all server-based software installations; served as the administrator for Sisense, SAS, SharePoint; and managed the change control board, including evaluating and approving application and infrastructure changes.
- **Information Security Officer.** Lloyd managed external vendors to conduct security assessments, audits, penetration testing, and other activities necessary to secure HVHC data. He oversaw the implementation of security improvements to maintain strict CMS requirements, developed the security plan and related documents, and trained users on security best practices.



Lloyd also served as a senior programmer and analyst, user support lead, and user support analyst during his tenure with HVHC.

Northern New England Accountable Care Collaborative (07/2012 to 06/2015). As the lead programmer and technical liaison, Lloyd handled a wide variety of IT, analytic, and business tasks to support start-up from the onset. He worked closely with consultants to implement a new web-based patient care product, managed technical relationships with multiple clients and vendors, provided day-to-day technical and user support for co-workers, and worked with the Leadership Team to legally wind down the organization.

Health Dialog (09/2005 to 06/2012). Lloyd served as the primary programmer and technical liaison to help start up the Northern New England Accountable Care Collaborative. He was the primary designer and programmer of the Physician Performance Measurement System (PPMS), responsible for bimonthly PPMS releases (testing, change request management, roll-out). He executed PPMS to generate reports for Maine Patient Centered Medical Home programs, documented PPMS and presented technical aspects of PPMS to company departments, implemented HEDIS and proprietary measures for use by PPMS, and worked with the Operations team to make HEDIS measures available company wide.

Anteon (07/2003 to 09/2005). Lloyd analyzed, coded, and modified mathematical models for military use. He also served as a primary tester for a large-scale military simulation and as a liaison between government customers and the project team.

Erie Scientific (05/2000 to 06/2003). As a quality control consultant, Lloyd created and modified advanced Excel workbooks and Access databases to improve worker efficiency and assist with quality assurance. He trained users how to use these tools, wrote and tested validation suites for FDA controlled databases, and served as a remote help desk/consultant for various projects.

**Andrea L. Clark, MS, Prosci® CCP**

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 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)**

- *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. Subprojects 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.

**Kristan Drzewiecki, PMP®, MP**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Science in Foreign Service, Georgetown University Master of Planning, Housing, and Community Development, University of Virginia Certified Project Management Professional®, a designation of the Project Management Institute®

Overview

Kristan Drzewiecki is a Senior Manager in BerryDunn's Government Consulting Group, with more than 10 years of professional project design, implementation, and management experience. She is a strong leader, facilitator, and technical writer with the ability to translate complex policies into clear, tangible actions. Kristan has a deep understanding of the systems and processes that support the delivery of government-funded health and human services.

Experience**West Virginia Department of Health and Human Resources (DHHR) (2016 – present).**

Kristan serves as a subject matter expert, policy analyst, and engagement manager for several WV DHHR projects:

- Kristan is currently leading the effort to redesign and update the Income Maintenance Manual (IMM). She has facilitated stakeholder review sessions, revised IMM content, and served as engagement manager.
- Kristan developed draft requirements, facilitated Joint Requirements Planning sessions, and served as a subject matter expert for the development of the Eligibility and Enrollment System RFP.
- Kristan served as project manager and lead analyst for a project to identify cost savings opportunities for Medicaid.

Michigan Department of Education (2016 to present). Kristan serves as Engagement Manager on this effort to define early childhood data needs and remove barriers to sharing early childhood data across state agencies.

Massachusetts HIX/IES Entities (2012 to 2015). Kristan served as QA Manager as part of BerryDunn's engagement providing IV&V services for implementation of Massachusetts' HIX/IES, a project conducted with the Massachusetts EOHHS, the Commonwealth Connector, and the University of Massachusetts Medical School (collectively known as the HIX/IES Entities). As QA Manager, Kristan led the review of the System Integrator's project deliverables and conducted QA reviews of overall project processes and deliverables.



Colorado Department of Human Services (DHS) (2014). Kristan served as Project Manager to assess DHS' current childcare automated tracking system to understand its technical feasibility relative to the Colorado Child Care Assistance Program. She also led the effort to define current and future system requirements.

West Virginia OIC (2011 to 2012). Kristan provided program management and strategic planning services to assist the State with evaluating its alternatives for implementing a HIX. As part of her work, she created an Exchange Implementation Work Plan; developed a HIX IT Strategic Plan; created a budget and sustainability model for the Exchange, with a focus on the IT components; drafted an I-APD and Cost Allocation Strategy for Medicaid-Exchange touch points; and assessed eligibility system options.

Maine DHHS (2009 to 2011). As Analyst for BerryDunn's contract providing IV&V, QA, and Technical Assistance for Maine's QNXT COTS MMIS and Fiscal Agent Solution project implementation, Kristan conducted reviews of project management and system design and development documents for clarity of content, consistency with project objectives, contractual compliance, and best practices and assisted with IV&V project management, including development of status reports. She also assisted with Go-live Readiness Assessments, including developing checklists, conducting stakeholder interviews, analyzing project status data, and preparing final deliverables.

Vermont Agency of Human Services (2011). Kristan served as an Analyst on BerryDunn's team to analyze the costs and benefits related to modernization of Vermont's legacy MMIS and associated systems, assess risks related to different future system options, and develop an I-APD.

Massachusetts EOHHS (2010 to 2011). Kristan served as Lead for the development of Massachusetts' State Medicaid Health IT Plan, with responsibility for managing the timeline, tasks, and team members associated with the development of the SMHP and the HIT I-APD.

West Virginia DHHR and BMS (2008 to 2011). Kristan worked with DHHR and BMS stakeholders to identify ACA provisions that impacted DHHR offices; evaluate specific ACA provisions in terms of their impacts on policies, programs, systems, budgets and operations; and monitor regulations and guidance. As Lead Analyst, she facilitated meetings with stakeholders, provided subject matter expertise, oversaw a team of BerryDunn analysts, and developed and reviewed project deliverables. During this time, she also served as an Analyst for the MITA 2.0 State Self-Assessment, assisted with the development of an RFP and APD for the MMIS Replacement project, and led the development of the DW/DSS APD.

Vermont Department of Children and Families (2010). Kristan was a Business Analyst on the team to develop requirements for a new unified data management system that improved the Children's Integrated Services client data management, billing and payment, and reporting capabilities.

West Virginia BMS (2006 to 2008). Kristan worked as part of BerryDunn's team to provide post-implementation QA oversight of West Virginia's MMIS. As QA Analyst, Kristan reviewed vendor deliverables, implementation planning documents, and other project artifacts to identify and recommend strategies to address potential risks and issues.



North Carolina Office of the State Auditor (2007). BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the State's Office of IT Services' EPMO. Kristan served as an 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.

Project Development and Grant Writing (2002 to 2006). Kristan has extensive experience developing projects and writing proposals for Federal, state, and local government programs, including Low Income Housing Tax Credit, Federal Home Loan Bank, HUD (Continuum of Care, HOPWA, CDBG, HOME, Section 811), corporations, and private foundations.

**Chris Fanikos, MPH**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Arts in History and Middle Eastern & Islamic Studies, New York University Master of Public Health in Public Health Policy, Yale University

Overview

Chris is an experienced public health professional with experience in corporate, healthcare, and educational organizations. He has developed skills in research, data analysis, project management, and program development. He has worked with various data models to develop and understand data relating to Medicaid, health policy, and behavioral health.

Experience

BerryDunn (11/2021 to Present). Chris is a Senior Consultant in the BerryDunn Health Analytics Practice Group (HAPG) Data Management & Strategy (DMS) team, where he helps clients by designing and implementing data models, ETL processes, and data warehouse design to support analytic and reporting requirements. Chris provides a wide range of data-related support, including profiling and quality validation testing, compilation, aggregation, and analytics, as well as data governance and master data management. Chris also supports team members by providing guidance on statistical modeling and advanced data visualization efforts.

University of Connecticut, Analytics & Information Management Solutions (AIMS) (01/2021 to 11/2021). Chris worked as a Solutions Analyst to develop data pipelines using Microsoft Azure services (Blob storage containers, Azure Data Factory, Azure Databricks) and NextGen (Mirth) Connect for ingesting and parsing Medicaid beneficiary clinical data to analyze the impact of COVID-19 and State telehealth policies on healthcare utilization and clinical outcomes; ingested, parsed, cleaned, and profiled ~2.1 million Consolidated Clinical Document Architecture (C-CDA) files from Connecticut FQHCs. He designed and implemented analytic data models using ingested clinical data; developed interactive, dynamic Tableau dashboards using these models to meet stakeholder-defined analytic requirements, including time trend and geospatial analyses.

University of Connecticut, AIMS (08/2019 to 01/2021). Chris worked as a Health Policy & Business Analyst to query extracts of the Connecticut All Payer Claims Database, including Medicaid claims, using Python and SQL to develop analytic data views. He developed dynamic, interactive dashboards in Tableau using these views. Chris also served as a lead business analyst for a variety of projects, including the establishment of the State's Health Information



Exchange (HIE) and grant-funded research focusing on telehealth and behavioral health utilization during COVID.

Brigham & Women's Hospital, Division of Pharmacoepidemiology & Pharmacoeconomics (05/2018 to 06/2019). Chris worked as a Research Trainee devise and conduct an independent research project relating to opioid and OUD treatment prescribing rates in Medicaid programs between 2008 and 2017. He scanned all 50 state legal codes for legislation on prescription drug monitoring programs, prescription limitations, and continuing medication education mandates; merged these data with Medicaid State Drug Utilization claims data into longitudinal datasets. He ran multivariate regressions and interrupted time series analyses on prescribing and policy data sets in R/SAS; drafting the results of these analyses for publication in a major American public health journal.

HAVEN Free Clinic (12/2017 to 02/2019). Chris worked as the Co-Director of Pharmacy to manage all aspects of the clinic's pharmacy, including maintaining the in-house formulary, overseeing medication dispensing, consulting with medical teams on cost-benefit decisions, and ensuring volunteer and patient satisfaction. He developed and conducted internal quality improvement projects on fill/delivery efficiency and medication adherence

Rennert International (08/2015 to 08/2017). Chris worked as a Manager in Sales & Marketing to establish, maintain, and develop relations with over 500 vendors and business partners. He compiled and analyzed data on partner performance and market trends for use in product development.

**Alex Flower**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Science in Business Administration, Grand Canyon University

Overview

Alex has extended experience in advanced data analysis and project management, demonstrated through developing comprehensive data analysis models and leading projects from start to finish focused on continuous improvement.

Experience**BerryDunn (10/2022 to present)**

- **West Virginia Bureau for Medical Services – Data Improvement Project (10/2022 to present).**
Alex will function as a data analyst assisting with data quality analysis and data profiling activities.
- **West Virginia Department of Health and Human Resources – Child Welfare Initiatives Project Management Services (10/2022 to present).**
Alex will function as a business analyst and data analyst assisting the project team with requirements gathering and data analysis to support development of dashboards and reports.

Mercer (02/2019 to 10/2022)

- **Associate Consultant (04/2021 to 10/2022)**
Alex developed and maintained an advanced Medicaid data analysis model that measured the distance relationship between surgery centers and specialty hospitals to determine improvements in healthcare utilization and cost appropriation. He streamlined and improved communication and project management practices across teams, resulting in a 20% increase in overall project efficiency and a subsequent increase in the scope of work capabilities. He also developed and maintained a high-cost drug analysis that determines costly conditions across Medicaid membership to measure and account for trends in statewide factors and associated health costs. Monitored analysis use across teams. Alex managed issues and improvements backlog that aided in continuous product improvement and improved data integrity.
- **Government Consulting Senior Analyst (04/2020 to 03/2021)**
Alex developed and maintained mental health data analyses for large quantities of Medicaid data focused on utilization review and healthcare outcomes. He improved documentation and program management practices that aided in cross-sector



communication, analysis version control, and overall project quality. He led root cause research and documented results into business insights that increased product integrity; presented findings with team leads, cross-sector partners, and external clients. Alex developed ticketing request template for analyses that led to better cross-sector collaboration, clarity, and documentation.

- ***Informatics Analyst (02/2019 to 03/2020)***

Alex increased data processing and cleansing logic efficiency by 25% for large quantities of Medicaid data by implementing programming best practices, utilizing relational databases, and developing comprehensive documentation. He developed utilization review analyses using healthcare data, relational databases, and data from disparate sources. He created validation models that measured the validity of data and tracked key metrics on a quarterly and monthly basis.

Rocket Mortgage (06/2017 to 02/2019)

- ***Closing Compliance Specialist (01/2018 to 02/2019)***

Alex worked with operations leadership and engineering teams to create guidelines for regulation exception requests, leading to a 15% increase in turn time on ticket requests. He developed improvements that increased internal and consumer clarity on sensitive mortgage documents.

- ***Business Metrics Analyst Intern (06/2017 to 12/2017)***

Alex worked with operations leadership and engineering teams to research, present, and implement an Out of Office process improvement that saved team leaders over 50 hours a year across eight teams. He developed and maintained Mortgage Operations dashboards for tracking internal measures and KPIs.

**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

**Danielle Joslyn**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in Mathematics, University of Southern Maine

Overview

Danielle is an experienced healthcare data analyst and project manager with excellent data analysis and evaluation skills. She is highly skilled with the management of patient claim information, building data warehouses, and performing data analysis in SAS and Microsoft SQL based environments and has the proven ability to implement and manage multiple projects, while maintaining high quality standards and providing value-added service to the client. She has demonstrated leadership experience in team-based environments, as well as the ability to work independently, to develop new processes and strategies to meet client needs.

Experience

BerryDunn (11/2021 to present). Danielle is a senior consultant with BerryDunn's Health Analytics practice group.

Cotiviti (10/2016 to 11/2021). Danielle worked as a Senior Implementation Manager and Product Manager to coordinate and manage projects for new clients and existing client expansions, including maintaining project timeline, gathering project requirements, developing project plans and milestones, and performing data analysis on incoming client data. She developed queries to analyze client data to ensure the data meets product needs, maintained all Jira® features/stories, and coordinated priority with the Retrospective Business. She participated in all program increment planning activities in an Agile team environment., coordinated internal resources for weekly checkpoints to ensure timely completion of project tasks, and developed standardized data analysis tools for the implementation team to perform data analysis and validation. Danielle also identified opportunities to streamline the implementation process and build standard client toolset, mentored Implementation Analysts on their assigned projects, and liaised for the implementation team with Research & Development, Operations, Data Management, Go-to-Market, and Product.

RxAnte (09/2015 to 09/2016). Danielle worked as a Senior Software Developer to design and develop reusable SAS and SQL code to standardize and analyze clinical information. She supported the Web Services team on development of front-end portal used by healthcare entities to achieve medication adherence, completed software development tasks, including analysis, design, implementation, documentation, and validation, and collaborated with business partners to define business requirements and specifications. Danielle provided information and support for ad hoc analytic projects for internal customers. She also performed data extractions from multiple claims data warehouse to meet project requirements.



Cotiviti/Connolly/iHealth Technologies (01/2012 to 09/2015). Danielle worked in many roles including Associate Business Systems Analyst, Business Systems Analyst, Auditor, and eventually Senior Auditor to identify claim outliers and overpayments utilizing a variety of Cotiviti tools including trend analysis and outpatient and inpatient pricing. She developed new and existing audit concepts, gained client acceptance, trained all audit levels to execute audit projects and performed quality review of claim submissions. Danielle was responsible for the review of eligible claims to ensure claims were selected as intended for the specific concept and she worked with assigned Data Analysts to enhance or create reports to aid in overpayment identification. She also served as Subject Matter Expert on internal tools and systems, mentored junior associates on Cotiviti tools and best practices, and provided day-to-day support to audit team members on query writing and concept development. She utilized understanding of SQL programming and data structure to identify and implement improvement opportunities in current processes and concepts. Danielle collaborated with business partners to understand how medical claim information should be reported and displayed in Access for day-to-day audit use. She participated in Design Sessions and Code Reviews, built and supported custom software solutions and analytics tools using Microsoft SQL Server, Access and Excel while providing team and cross-departmental training(s) on new Cotiviti tools or processes.

Health Dialog (02/2007 to 01/2012). Danielle worked as a Senior Implementation Team Leader, Senior SAS Programmer Analyst and SAS Programmer Analyst to develop reusable SAS software to in-take, standardize, quality control, and analyze clinical information such as facility, professional, pharmacy, provider, and health survey insurance data. She advanced, documented, and communicated concepts, utilities, processes, standards, and procedures, while providing and implementing strategic ideas for improvement. Danielle worked alongside management to delegate tasks to team members, provided day-to-day support for programmers, and completed software development tasks, including analysis, design, implementation, documentation, and validation. She facilitated code reviews for code development, standardization, efficiency, and accuracy. Danielle was an active contributor to the hiring, coaching, goal setting and performance reviews of new employees, while working with existing team members to mature their software development skills, and business intelligence.

**Brody J. McClellan, MPA**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since September 2021
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 in Health & Human Services Administration, University of Arizona CPA Exam Prep, Accounting AB

Overview

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

Experience

Mercer GHSC (October 2019 to July 2020). Brody worked as a senior consultant with roles as project manager and project leads for lead for two actuarial rates team for California Medicaid. 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 (October 2019 to June 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 (October 2017 to October 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 (1115 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 (April 2015 to October 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 (December 2007 to April 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 ensure the proper flow of SNAF funds between MSA, the health plans and the public entities.

**Arisara Miller**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Bachelor of Science in Business Administration, Oklahoma State University Master of Science in Economics, Oklahoma State University

Overview

Arisara is an experienced healthcare data analyst with over 22 years of experience working with healthcare institutions and insurance agencies across the country. Her expertise includes managed care organizations, Medicaid payment methodologies, claims-based algorithms, and data extractions.

Experience

BerryDunn (06/2018 to present). Arisara serves as part of BerryDunn's Health Analytics Practice Area as a manager, focusing on data analytics engagements with healthcare clients across the country.

Blue Shield of California (05/2017 to 05/2018). As a medical informaticist, Arisara designed and continually improved Tableau models to track cost of healthcare savings from initiatives such as ClaimXten clinical editing, spine surgery / pain management, and radiology pre-service authorization programs. She performed medical and payment policy analyses to inform the Medical Policy Impact Committee, enable new decisions, and evaluate ongoing practices. Other duties included documenting business requirements and designing data models to store post-service clinical review records in the new Enterprise data warehouse infrastructure, and serving as the team's Tableau Ambassador to establish and encourage best practice standards for server publishing, efficiency, and data visualization.

Boston Medical Center HealthNet Plan (07/2007 to 05/2017)

- **Medical Economics Principal (01/2014 to 05/2017)**

Arisara led the development of numerous complex and time-sensitive analyses to support the CFO, Chief Actuary, and Vice Presidents. She analyzed data to support Medicaid payment method re-pricing, primary care physician attribution, and ACO contract strategy. Other tasks included fulfilling state reporting requirements for total medical expense and relative pricing, developing the quarterly medical expense dashboard, collaborating with IT to ensure data integrity and resolve issues, and guiding junior and senior analysts on SAS/SQL coding, enterprise reporting definitions, and best practices.



- **Senior Medical Economics Analyst (07/2007 to 11/2011).**
Arisara tracked medical care expenses and utilization trends to inform senior management and influence key decisions on budgeting and pricing projections. She created reporting packages to satisfy the needs of internal and external customers, conducted research with Medical Directors to build methodologies for identifying at-risk patients for telephonic outreach programs as mandated by state authority and corporate goals, prepared and presented ad hoc analyses to support key corporate initiatives to improve care quality and reduce cost, and coordinated with IT to validate data quality and make recommendations on process and system improvements. Arisara was also responsible for writing project plans, business requirements, technical specifications, and analytic definitions, and for coaching staff on healthcare data, data warehouse structures, and the analytic tool being used.
- **Blue Shield of California (11/2011 to 01/2014).**
With Blue Shield of California, Arisara built and enhanced analysis methods, data systems, and web-based reporting tools. As a medical informaticist, she critically reviewed existing processes to identify inefficiencies and potential problems, took actions to explore and implement solutions, and directly supported the Chief Health Officer, vice presidents, and directors to achieve corporate goals. She set up an automated interface to deliver daily data feeds from internal data marts to the case management system vendor to enhance member-level case management, and established and maintained a robust model to calculate savings from pre-service review activities and medical policies, which revealed significant cost reduction opportunities.

Harvard Pilgrim Health Care (06/2004 to 07/2007). As a business analyst for medical economics, Arisara designed and developed claim-based algorithms to pinpoint patients for internal disease management programs such as Oncology, End-Stage Renal Disease, High-Risk Pregnancy, and Cardiac. In addition, she was responsible for building and maintaining related registry records. She worked in partnership with Medical Management and Actuarial to develop the appropriate approach to calculating the return on investment for disease management programs, produced and summarized the key findings of ad hoc strategic financial and budget projection reports, evaluated historical statistics and administrative information to pinpoint recent and prospective budgeting and pricing trend drivers, planned and implemented user acceptance testing procedures and SAS programming templates to validate the integrity of the new enterprise data warehouse and web-based reporting tools, documented and automated data mining and reporting processes to achieve consistency and efficiency, and provided SAS and general analytical training to other analysts.

BlueCross BlueShield of Massachusetts (05/2002 to 06/2004)

- **Finance Development Program for Audit and Controls (01/2004 to 06/2004).**
Arisara completed operational and IT readiness assessments of new product development initiatives. She performed ad hoc data extractions and analyses to support internal and external audit services, and assisted the legal department to ensure that appropriate confidentiality agreements are in place before releasing any HIPAA-protected health information to external parties.



- **Analyst (05/2002 to 01/2004).**

Arisara evaluated the financial and clinical effectiveness of Cardiac and Diabetes disease management programs. She oversaw data compilations and rate calculations for several NCQA HEDIS measures, co-wrote annual population-based analysis publications to present the top 20 medical conditions affecting insured populations, and studied and compiled claim and medical chart review data to secure the annual supplemental Medicare + Choice payments for the heart failure patient population.

CommunityCare of Oklahoma (05/2000 to 05/2002). As an analyst, Arisara extracted and analyzed healthcare data to satisfy the needs of internal and external customers. She constructed, updated, and maintained databases for various uses, such as NCQA HEDIS rate calculations, the pharmacy data warehouse, and the dental claims database. She also maintained reference tables to enable consistent and accurate reporting capabilities.

**Dina Nash, MPH**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Psychology, Harvard University Master of Public Health in Epidemiology and Biostatistics, Boston University

Overview

Dina is a senior consultant with the Health Analytics Practice Group who specializes in healthcare data analysis of claims and clinical data. She uses SAS, SQL, Excel, and Tableau for analyses and visualizations. Dina has training in conflict communication, delegation, facilitation, and project management. Dina is a council member of BerryDunn's Diversity, Equity, and Inclusion Advisory Council.

Experience

BerryDunn (09/2021 to present). Dina serves as a senior consultant, working with clients on data analysis, claims analysis, and clinical data projects. Dina also works on mandated benefit reviews (estimating the financial impact of pending mandated benefit legislation), and health policy and regulatory analyses. Dina develops data visualizations that inform and drive decision-making, and collaborates on population health analyses of utilization and outcomes.

Mass General Brigham Enterprise Analytics (06/2018 to 07/2021). Dina worked as a healthcare data analyst to develop SAS and SQL code for metrics for a complex care program dashboard used by program and hospital leadership. The complex care program was comprised of a diverse patient population, including those on Medicaid and Medicare. She supported patient centered medical home program with creation of advanced primary care strategy metrics, logic, and visuals, and assisted manager with supporting new analysts. She reviewed code written by other analysts. Dina conducted a Deferred Care Analysis due to COVID-19 epidemic that informed state and system wide decision-making and led to publication in American Journal of Managed Care. This Deferred Care Analysis was stratified by commercial payers, Medicaid, and Medicare, as well as by select social determinant of health variables.

Partners HealthCare Enterprise Analytics (08/2017 to 05/2018). Dina worked as a program analytics intern covering system level Population Health program areas.

Center for Population Health (06/2017 to 08/2017). Dina worked as a financial and clinical analytics intern to support the quality team by updating dashboard and exception reports using SAS and Excel. She conducted analysis in SAS on Generalized Anxiety Disorder Screening Measure and created pharmaceutical cost trend driver visuals. Dina also collaborated on healthcare services cost equivalency visual in PowerBI.



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

**Nicole Spears, MBA**

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 Science in Corrections, University of Indianapolis Master of Business Administration, focus in Healthcare Management, Western Governors University

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.

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

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 to present).*
As project manager, Nicole assists the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP, including Request for Proposal (RFP) development, proposal response evaluation, and project tracking. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.
- **West Virginia Bureau for Medical Services (BMS)**
 - *Mountain Health Trust (MHT) Re-Procurement Project (3/2022 to present).*
As project manager, Nicole assists the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHT, including Request for Proposal (RFP) development, proposal response evaluation, and project tracking. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 to Present).*
As project manager, Nicole assists the client with development of a



modernization strategic plan, procurement planning activities, and providing subject matter expertise on MES. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.

- o *Managed Care Encounter Data Quality Project (7/2021 to 2/2022).*

Nicole worked as a subject matter expert assisting with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). For this project she developed a System Development Lifecycle (SDLC) Coordination Plan to provide a process for reviewing and prioritizing BMS enterprise system updates.

Gainwell Technologies (12/2017 to 07/2021). Nicole worked 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 worked 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). Nicole worked 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.



State of Indiana. (07/2008 to 04/2012). Nicole worked as the operations and MCO SME for State of Indiana. 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. Nicole also served as a policy analyst on the OMPP project to direct 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.

**Jeff Stoddard**

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

Overview

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

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

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

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

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

Proposed Project Role:	General 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

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 Advance 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 10 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 (MDQ) – 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 healthcare 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, Intergrity. 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.

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

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

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

**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.

**Fei Zou, MS**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Healthcare Analyst
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	Bachelor of Science in Applied Mathematics, Tongji University Master of Science in Mathematical Science, University of Massachusetts Lowell SAS Certified Advanced Programmer for SAS 9

Overview

Fei is an experienced analyst with more than 10 years' experience in the HealthCare industry, including nine years with a major New England Medicaid managed care organization (MCO). She is proficient in SAS, SQL, and Excel and is familiar with medical and pharmacy claims, HEDIS, CMS/NCQA/PQA measures, DRG and Risk Adjustment. She has developed her skills in learning quickly, multitasking, and working both independently and on a team.

Experience

BerryDunn (07/2021 to present). Fei is working as Senior Healthcare Analyst in Health Analytics Group. Fei runs monthly financial, provider reports and data warehouse for multiple clients. Fei supports with data collection, data preparation and data validation in different projects and takes leads on ad hoc analysis.

- **West Virginia Bureau for Medical Services (BMS).**
 - *Substance Use Disorder (SUD) Waiver Initiative Project (7/2022 to present).* As data analyst for Phase V of the SUD waiver initiative, Fei is responsible for research on SUD services, CMS requirements, and gathering and analyzing State Medicaid data.
 - Data validation, including claim warehouse, reports and ad hoc records e.g., Aetna discharge tables

BMC Health System (formerly HealthNet Plan) (08/2012 to 07/2021). Fei worked as a health data analyst II, senior health data analyst, and senior medical economics analyst. She led the development and production of regulatory reports to MA EOHHS, NH DHHS, and CMS, including NCQA/PQA measures. She developed and analyzed monthly reports to identify high-risk/high utilization members for care management. Fei supported strategic planning including risk adjustment and quality improvement initiatives. She created a results-tracking dashboard for utilization trends, quality measure compliance, and care management operations for both internal and external clients. Fei also investigated unusual utilization trends, built and maintained a profitability database for an ACO model, and worked on the claim service



categorization from the design phase to the UAT phases. She was responsible for code migration and impact analysis for the ICD9/ICD10 transition, as well as training for new hires.

Health Dialog (08/2010 to 08/2012). Fei worked as an evaluation analyst to design and code models to estimate clinical outcomes and financial impact. She consulted with internal and external customers for an appropriate analysis plan and debugged, reviewed and wrote Standard Operating Procedures for SAS products.

**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 subprojects 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.



Nolan Cyr

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Science in Leadership and Organizational Studies, University of Southern Maine Master of Arts in Leadership Studies, University of Southern Maine Masters Certificate in Organizational Development, University of Southern Maine

Overview

Nolan is a highly dependable and innovative consultant with experience in both organizational development and Medicaid. He has extensive knowledge of organizational systems and culture, data collection and analysis strategies, and training design, development, and implementation. He is confident facilitating across groups and has extensive experience coordinating complex retreats and events.

Experience

BerryDunn (06/2022 to present).

- **West Virginia Bureau for Medical Services**

- *Organization Development project (07/2022 to present).*

As a Business Analyst, Nolan assists the State with activities specific to organizational development in West Virginia. His focus at present is supporting the State as BMS develops a three-year strategic plan, working on supporting research, deliverable development, and meeting facilitation.

American Rescue Plan Section 9813: Mobile Crisis Grant Project (08/2022 to present).

As project coordinator ARP Mobile Crisis project, Nolan assists the State in planning for the implementation of the Medicaid mobile crisis services program. He conducts program coordination among involved stakeholders, captures meeting notes, tracks action items, and supports the development of project deliverables, such as the creation of the SPA draft for submission to CMS.

- **Delaware Division of Medicaid & Medical Assistance**

- *Advance Planning Document Consulting Services: Phase II (07/2022 to present)*

As a Business Analyst and Project Coordinator, Nolan assists the State with the development, updating and management of Advance Planning Documents (APD) to help the State obtain federal funding for new DHHS systems projects. He assists in the updating of APD project budget tables, MDBT tables, and narrative sections, captures meeting notes, tracks action items.



BerryDunn Medicaid Learning Center (08/2022 to present)

- As the MLC Operations Lead, Nolan assists BerryDunn with managing the Prosperity LMS through account creation, troubleshooting technical problems, and managing user enrollments. He leads redesign efforts for instructional materials and program completion certificates and conducts presentations to new employees and prospective buyers.

MaineHealth (05/2019 to 06/2022). Nolan worked as an intern with the senior HR team to develop pieces of training targeted at improving leadership competencies in directors and executives across the MaineHealth network. He developed pieces of training on Time Mastery, Emotional Intelligence, and DiSC, as well as, assisted in the creation of MaineHealth's new leader first-year success and Leader as Coach training programs, which were administered to all directors and executives. He organized and summarized annual systemwide employee engagement survey data and build a dashboard to measure and chart changes across 15 HR metrics.

Student Engagement & Leadership, University of Southern Maine (09/2021 to 06/2022). Nolan served as Graduate Assistant to help create meaningful connections with the campus community through engagement and leadership development opportunities. He advised and mentored student leaders, oversaw group activities, and facilitated conflict resolution. He worked as lead project manager for event sequences and envisioned and constructed a campus-wide event calendar for student groups.

Teens to Trails (01/2021 to 06/2022). Nolan served as an Advisor on the youth Advisory Council to connect high school students to outdoor experience. He assisted in the ideation, creation, and implementation of the council and collaborated with the Executive Director to establish group structure, objectives, and purpose. He led educational workshops, coordinated multi-day group outings, and facilitated group decision-making.

Outdoor Adventures Board, University of Southern Maine (09/2017 to 05/2021). Nolan served on the executive board, which involved tasks ranging from guiding trips to overseeing club activities. He expanded student engagement, oversaw club partnerships with outside organizations, and implemented annual club leadership and wilderness medical training retreat to improve quality and safety of trips. He also managed the budget as financial chair and coordinated local and out-of-state trips.

DiMillo's On the Water (07/2016 to 01/2020). As a server, Nolan practiced working in a fast-paced environment as a team to build relationships with guests and deliver high end service. He was responsible for catering to the customers' needs in a prompt manner and assuring their satisfaction.

**Alexandra (Alex) Glowacky, CAPM**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed 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.

- *Public Health Emergency (PHE) Support Project Phases I and II (12/2021 to present)*. Alex helps coordinate and produce the biweekly COVID-19 and other Federal Guidance and News Tracker under the PHE Support Project. This work supports the PHE Roundup that BerryDunn provides BMS with.
- *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). Alex 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). Alex 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). Alex worked as a resource and research intern to investigate and network with other local social service organizations in order to update and



revitalize the organization's resource guides. She trained in providing emotional support and relational assistance to trauma survivors.

**Azba Hotelwala**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Support Staff, employed with BerryDunn since May 2022
Years of Experience Relevant to Proposed Role:	4 years
Certifications 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 West Virginia Bureau for Medical Services' Home and Community-Based Services (HCBS) Implementation Project. As a project coordinator and business analyst for the project, 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 collaborate 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 to carry out COVID-19 data entry for the MCCSC school district and utilize first aid skills to assess and relieve student's needs.



LaserAway (03/2022 to 05/2022). Krista worked as a Patient Care Coordinator and Aesthetic Sales Representative to provide comprehensive consultations and care to patients by developing, monitoring, and evaluating the needs of each case. She acted as liaison between the clinician and patient by keeping open communication, assessed supply needs and maintained the clinic schedule, and organized schedules and calendars.

The Union Pub & Grill (08/2020 to 03/2022). Krista served as Lead Bartender/Social Media Manager to use her expert knowledge of full-service operations and inventory, customer service skills, and time management skills. She maintained a professional environment and personable demeanor while building friendly rapport with customers, ensured staff provided a positive experience with customers, and managed social media and marketed special events.

American Campus Communities (01/2019 to 08/2020).

- **Senior Leasing Agent/Community Coordinator (01/2019 to 08/2020).**
Krista was responsible for over \$700,000 in the company's leasing sales. She planned meetings, organized schedules and calendars, and provided updates on current resident/prospects. Krista was responsible for completing large volumes of leasing paperwork and oversaw the signing of leasing documentation. She handled administrative work to smooth new resident move-in processes, planned marketing and outreach strategies to consistently bring in new leasing prospects, and quickly addressed student and residential problems to avoid escalation and keep the residential environment peaceful and welcoming. She adhered to fair housing standards to avoid any legal issues and prevent discriminatory practices, and tracked leasing inquiries and vetted prospects with LAMS to stay organized and efficient against leasing targets. Additionally, Krista organized events to engage residents and build strong sense of community, met with board of directors to discuss community needs and resolve issues or disputes, and conducted 50+ showings per week to convert prospects into qualified residents.
- **Social Media Ambassador (08/2019 to 08/2020)**
Krista participated in and created social media content for the leasing office's Instagram, Facebook, and TikTok. She was involved in the ideation and creation of different giveaways and other marketing strategies, and completed contract work with the company as an ambassador.

YUM! Brands (09/2016 to 01/2018). Krista served as Shift Manager in charge of cash drawer drops and preparing daily bank deposits. She trained new team members to adhere to company policies and service standards in addition to mentoring on job-specific skills. Krista was instrumental in the opening of a new franchise in West Virginia.

**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

Overview

Alycia Minshall is an editing and communications professional with more than 10 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.

**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 Poynter ACES Certificate in Editing

Overview

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

Experience

BerryDunn (09/2021 to present). As a member of BerryDunn's Editorial/QA team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, reports, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards. Caitlin also helps train new teammates and creates and presents educational materials to the Consulting Team. Caitlin is a Poynter ACES Certified Editor.

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

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

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



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

**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.

**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 nonprofit organizations. She has worked with educational institutes to develop skills in project management, communication, and planning.

Experience

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

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

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

- *Program Coordinator (06/2014 to 06/2018)*
Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.
- *AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 to 08/2013)*
Janine coordinated communications and logistics among five committees in a 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.



Jonathan Williams

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

Overview

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

Relevant Experience

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

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

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

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

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

**Jordan Ramsey**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Editor (employed with BerryDunn since 06/2018)
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MA, English: Professional Writing, Southeastern Missouri State University BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Overview

Jordan is an editor and proofreader in BerryDunn's Government Consulting Group and a member of the Editorial/QA team. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents.

Relevant Experience

BerryDunn (06/2018 to present). 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 assists in providing new-hire orientation to BerryDunn employees to help them understand the Editorial/QA department's review process and firm style guidelines.

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

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

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

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

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

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



Other Teaching Experience (2006 to 2010). Lanier Technical College: As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

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

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

**Karla Fossett, MFA, Prosci® CCP**

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

Overview

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

Experience

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

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

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



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.



Appendix B: Deliverable Dictionary

Table 5: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Monthly Commissioner Briefing	A monthly status update for the BMS commissioner.
02	Monthly Status Reports	Monthly Status Reports highlight project status, activities accomplished each month, and activities planned for the following month. The Monthly Status Report will also identify any known project risks or issues and will provide a record of TAPS hours allocated and available.
03	Decision Log	The Decision Log will record and document all key decisions made throughout the duration of the project, including the addition of new subprojects.
04	Risk and Issues Log	The Risks and Issues Log will record any notable risks and issues which surface throughout the duration of the project; the log will include a description of the risk/issue, actions taken, and final status/ resolution.
05	Action Item Log	The Action Item Log will document any action items initiated, open, and closed throughout the duration of the project.
06	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 Project Closeout 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 6: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BMS/State	Bureau for Medical Services
CL	Commodity Lines
CM	Care Management
CMS	Centers for Medicare & Medicaid Services
CSedW	Children with Serious Emotional Disorder Waiver
DHHR	Department of Health and Human Resources
EM	Engagement Manager
FFP	Federal Financial Participation
FFS	Fee for Service
GPM	General Project Manager
HCBS	Home and Community-Based Services
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OM	Operations Management
PE	Performance Management
PMP®	Project Management Professional®
PRTF	Psychiatric Residential Treatment Facility
QA	Quality Assurance
S&C	Standards and Conditions
SED	Serious Emotional Disturbance
SME	Subject Matter Expert
SOW	Scope of Work
SPA	State Plan Amendment
SS	Support Staff
WV	West Virginia