



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: 05-11-2023

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 BMS2300000033 1	Procurement Folder:	1223649
Document Name:	Data Improvement Project (DIP) - Phase IV	Reason for Modification:	
Document Description:	Data Improvement Project (DIP) - Phase IV		
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: \$1,743,220.00

Purchasing Division's File Copy

CA 5/18/23
PURCHASING DIVISION AUTHORIZATION
DATE: *May 18 5/22/2023*
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION
DATE: *Beverly Tolen 5-23-23*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Data Improvement Project (DIP) - Phase IV

Dates of Service: 05/22/2023-06/14/2024

Total: \$1,743,220.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$13,760.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-05-22	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 64 Hours @ \$215 = \$13,760

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$8,640.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-05-22	2024-06-14				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 32 Hours @ \$270 = \$8,640

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$150,720.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2023-05-22	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

Emily Hendrickson 32 Hours @ \$80 = \$2,560
Alycia Minshall 16 Hours @ \$80 = \$1,280
Caitlin Cabral 16 Hours @ \$80 = \$1,280
Carole Ann Guay 32 Hours @ \$80 = \$2,560
Grady Black 1,220 Hours @ \$80 = \$97,600
Hailey Holden 32 Hours @ \$80 = \$2,560
Janine DiLorenzo 32 Hours @ \$80 = \$2,560
Jon Williams 32 Hours @ \$80 = \$2,560
Jordan Ramsey 32 Hours @ \$80 = \$2,560
Megan Blount 312 Hours @ \$80 = \$24,960
Megan Hamilton 16 Hours @ \$80 = \$1,280
Krista Clay 96 Hours @ \$80 = \$7,680
Nate Beasley 16 Hours @ \$80 = \$1,280

Total 1,884 @ \$80 = \$150,720

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,570,100.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2023-05-22	2024-06-14				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:
General Project Manager: Base Year One

Hourly Rate: \$175.00

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

Jennifer Elwood 32 Hours @ \$175 = \$5,600
 Alex Flower 440 Hours @ \$175 = \$77,000
 Arisara Miller 540 Hours @ \$175 = \$94,500
 Chris Fanikos 680 Hours @ \$175 = \$119,000
 Danielle Joslyn 1,720 Hours @ \$175 = \$301,000
 Dawn Webb 64 Hours @ \$175 = \$11,200
 Dina Nash 700 Hours @ \$175 = \$122,500
 Fei Zou 700 Hours @ \$175 = \$122,500
 Jason Hargrove 32 Hours @ \$175 = \$5,600
 Lloyd Butler 160 Hours @ \$175 = \$28,000
 Jeff Stoddard 1,234 Hours @ \$175 = \$215,950
 Jim Strassenburgh 60 Hours @ \$175 = \$10,500
 Buffy Cranford 1, 030 Hours @ \$175 = \$180,250
 Nicole Spears 560 Hours @ \$175 = \$98,000
 Peter Alfrey 400 Hours @ \$175 = \$70,000
 Susan Chugha 300 Hours @ \$175 = \$52,500
 Julie Bandy 320 Hours @ \$175 = \$56,000

 Total 8,972 Hours @ \$175 = \$1,570,100



May 1, 2023

To Whom It May Concern:

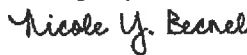
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the West Virginia Data Improvement Project (DIP) Phase IV project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 14 months. BerryDunn agrees to a SOW start date effective May 22, 2023.

Assuming a start date of May 22, 2023, the work would then conclude on June 14, 2024. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

DocuSigned by:

4E322BB4203F4C8...

Nicole Becnel
Principal
681-313-8905


Agree



**Staffing Plan and Scope of Work for the
West Virginia Bureau for Medical Services (BMS)
Data Improvement Project (DIP) – Phase IV
Prepared for CMA #HHR21*03 – Final**



Submitted by:

Nicole Becnel, PMP®, MBTI Certified Practitioner, Principal
Jennifer Elwood, FSA, MAAA, FCA, Principal
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207-541-2244
nbecnel@berrydunn.com
jelwood@berrydunn.com

Submitted on:

May 1, 2023

berrydunn.com



Staffing Plan and Scope of Work (SOW) for the Bureau for Medical Services (BMS) Data Improvement Project (DIP) – Phase IV

BerryDunn will assist BMS with the tasks outlined in this SOW as part of the DIP Phase IV Project.

1.0 Key Information

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the DIP – Phase IV SOW.

The West Virginia (State) BMS has requested that BerryDunn continue providing assistance for the Phase IV of the DIP. Phase I of the DIP began on September 1, 2019, and ended on February 28, 2021. Phase II of the DIP built upon the analysis, findings, and deliverables from Phase I of the project and concluded on February 28, 2022. Phase III of the project ended on February 28, 2023, and focused on the delivery of a Data Reconciliation Report and assisting the State with data profiling for the Enterprise Data Solution (EDS) project to help ensure data quality in the implementation of the EDS. For Phase IV, BerryDunn will provide project oversight, project management, data quality improvement initiatives, oversight assistance, and flexible analytic support.

The scope for the DIP – Phase IV SOW will include:

- Continuation of EDS data-profiling activities
- Continuation of Transformed Medicaid Statistical Information System (T-MSIS) support
- Review of Medicaid Management Information System (MMIS) encounter data edits
- Ad hoc analytic support
- Building and implementing two Jira® projects for data quality tracking and change request tracking
- Implementing a System Development Lifecycle (SDLC) methodology
- Assisting with Managed Care Organization (MCO) member/eligibility data enhancements

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

- Gen 1.0: Improve BMS effectiveness and efficiency
- Gen 3.0: Leverage technology to enhance performance and decision-making
- Gen 3.1: Enhance reporting capabilities to allow for more efficient and effective performance monitoring
- Gen 3.2: Improve data access, analysis, and reporting to support decision-making



- Gen 5.0: Help Ensure Program Quality
- BR 1.0: Enhance the security, timeliness, and accuracy of data exchanged with authorized and authenticated business partners
- BR 1.2: Standardized processes for data validation and reconciliation
- BR 1.3: Standardize process for capture of reporting and data exchange requirements
- CO 1.0: Enhance BMS' ability to monitor contractor performance against approved measures
- FM 1.0: Improve access to information necessary for financial management
- OM 1.0: Improve operational efficiency and reduce costs in the healthcare system
- PL 1.2: Improve tools and provide training for data analysis to help improve healthcare decision-making



2.0 Assumptions

Time and cost estimates for this SOW are based on the following assumptions:

Deliverables will be provided in an agreed-upon format.

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

The State leadership team will consist of Fred Lewis (BMS Deputy Commissioner, Plan Management and Integrity) as the project sponsor, and Leon Smith (BMS Data Warehouse Specialist II, Office of Quality Management) as the BMS project lead. State leadership to support the project will also include Brandon Lewis (Director, Office of Medicaid & Children's Insurance Program (WVCHIP) Enterprise Systems).

- The BerryDunn leadership team will consist of Ed Daranyi and Jennifer Elwood providing engagement oversight, Peter Alfrey providing program oversight, and Julie Bandy, Susan Chugha, and Jeff Stoddard serving as project leads.

BerryDunn assumes the scope of the DIP is to assist BMS in improving the quality and usability of data contained in the West Virginia Medicaid Enterprise Systems (MES) and associated decision support resources.

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the project Microsoft SharePoint site and will be brought to the attention of the BMS project sponsor.
- The State project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- This DIP – Phase IV SOW assumes that tasks to be completed by external entities (including other State agencies, vendors, and federal regulators) can be completed within the durations established in the initial Project Timeline and Schedule.
- This DIP – Phase IV SOW assumes BerryDunn will be granted timely and adequate access to State Medicaid data, Medicaid MCO data, other Department of Health and Human Resources (DHHR) program data such as WVCHIP data, and associated data facilities and access tools, including but not limited to, data from the MMIS, the Data Warehouse/Decision Support System (DW/DSS), and the EDS.
- The State intends to utilize the MMIS Implementation Advance Planning Document (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on April 5, 2023, for total state and federal funds in the amount of \$72,847,468 under project identifier WV-2023-02-21-MMIS-IAPDU-MITA. The estimated cost of the services to be delivered under this SOW is \$1,743,220 (included in the approved Advanced Planning Document [APD]).



Therefore, any additional scope that is added to the services to be provided under this SOW may require that the State update its MMIS IAPD to allocate additional funds for project management.

- The BerryDunn team will explore strengthening WV partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and leverage the tools and procedures for data quality enhancements and opportunities.



3.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work, identifies BerryDunn team members responsible for conducting the work, and lists the estimated hours for completing each key task. A high-level timeline for the activities described below is provided in Section 6.0.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p>BerryDunn will provide resources with relevant expertise to assist DHHR with facilitating, planning, and designing State partnerships and initial support for additional partnerships.</p> <p>BerryDunn will continue updating the Leverage and Reuse Opportunities Repository, as requested.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> Deliverable D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of the D08: Project Closeout Summary by the BMS project sponsor or their designee.</p>	<p>Ed Daranyi</p> <p>Nicole Becnel</p> <p>Jennifer Elwood</p> <p>Peter Alfrey</p> <p>Susan Chugha</p> <p>Jeff Stoddard</p> <p>Julie Bandy</p>	112 hours
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will conduct a kickoff meeting with key stakeholders to validate</p>	<p>Peter Alfrey</p> <p>Jeff Stoddard</p> <p>Susan Chugha</p>	778 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>business process owners and State goals and objectives.</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing service level agreements (SLAs) such as, project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> Deliverable D02: Monthly Status Reports <p><i>Completion Criteria</i></p> <p>Project Execution and Control will be deemed complete upon successful completion of the D02: Monthly Status Reports and D08: Project Closeout Summary.</p>	<p>Megan Blount Julie Bandy Hailey Holden Jordan Ramsey Emily Hendrickson Caitlin Cabral Carole Ann Guay Jon Williams Krista Clay Dawn Webb Jason Hargrove Megan Hamilton Alycia Minshall Nate Beasley Janine DiLorenzo</p>	
3.0	<p>Data Quality Improvement Initiatives</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following tasks to help achieve data quality improvements:</p> <ul style="list-style-type: none"> Continue data-profiling activities for the EDS Review the current MMIS encounter data edits and provide suggestions for modifying these edits to support higher data quality Identify MCO member/eligibility data enhancements <p><i>Deliverable(s)</i></p>	<p>Peter Alfrey Dawn Webb Jeff Stoddard Susan Chugha Julie Bandy Megan Blount Hailey Holden Nicole Spears Arisara Miller Fei Zou Chris Fanikos Lloyd Butler Danielle Joslyn</p>	3,922 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Deliverable D03: MMIS Encounter Edits Recommendations Report</p> <p>Deliverable D04: EDS Data-Profiling Biweekly Activity Report</p> <p>Deliverable D05: MCO Member/Eligibility Data Enhancements Research Summary</p> <p><i>Completion Criteria</i></p> <p>Data Quality Improvement Initiatives will be deemed complete with the acceptance of Deliverable D03: MMIS Encounter Edits Recommendations Report, Deliverable 04: Data-Profiling Biweekly Activity Reports, and Deliverable D05: MCO Member/Eligibility Data Enhancements Research Summary.</p>	<p>Dina Nash</p> <p>Buffy Cranford</p> <p>Alex Flower</p> <p>Grady Black</p> <p>Jordan Ramsey</p> <p>Emily Hendrickson</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Jon Williams</p> <p>Krista Clay</p> <p>Megan Hamilton</p> <p>Alycia Minshall</p> <p>Nate Beasley</p> <p>Janine DiLorenzo</p>	
4.0	<p>Oversight Assistance</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following tasks to assist with activities under the DIP – Phase IV:</p> <ul style="list-style-type: none"> Provide T-MSIS support – biweekly meeting facilitation with BMS and Gainwell; monthly meeting facilitation with BMS, Gainwell, and CMS; IAPD-U updates as needed; T-MSIS CMS dashboard slide review <p>Deploy Jira® to support the Encounter Data Quality (EDQ) project D10: SDLC Coordination Plan, centralized data quality issue tracking, and centralized change request tracking</p> <ul style="list-style-type: none"> Develop, plan, and implement enhanced SDLC process for BMS <p><i>Deliverables</i></p>	<p>Peter Alfrey</p> <p>Jeff Stoddard</p> <p>Susan Chugha</p> <p>Julie Bandy</p> <p>Megan Blount</p> <p>Halley Holden</p> <p>Nicole Spears</p> <p>Jim Strassenburgh</p> <p>Arisara Miller</p> <p>Fei Zou</p> <p>Chris Fanikos</p> <p>Lloyd Butler</p> <p>Danielle Joslyn</p> <p>Alex Flower</p> <p>Grady Black</p> <p>Jordan Ramsey</p> <p>Emily Hendrickson</p>	4,100 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Deliverable 06: Deploy Jira® Projects to Production (data quality issue tracking, centralized change request tracking)</p> <p>Deliverable D07: Updated EDQ Project SDLC Plan documents</p> <p><i>Completion Criteria</i></p> <p>Oversight Assistance phase will be deemed complete upon submission and approval of the D06: Deploy Jira® Projects to Production and D07: Updated EDQ Project SDLC Plan documents.</p>	<p>Caitlin Cabral Carole Ann Guay Jon Williams Krista Clay Megan Hamilton Alycia Minshall Nate Beasley Janine DiLorenzo</p>	
5.0	<p>Analytic Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide the equivalent of one full-time analyst to support the BMS team on an as-needed basis. Tasks could include:</p> <ul style="list-style-type: none"> • Code development assistance/review for quality measures • Ad hoc data analytic requests • Technical research 	<p>Jeff Stoddard Arisara Miller Fei Zou Chris Fanikos Lloyd Butler Danielle Joslyn Alex Flower Grady Black</p>	2,000 hours
6.0	<p>Project Closeout</p> <p>BerryDunn will prepare the Deliverable 08: Project Closeout Summary that includes an inventory of all project documentation and deliverables to BMS at project close.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> • Deliverable 08: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the State project sponsor or his/her designee formally accepts and signs D08: Project Closeout Summary.</p>	<p>Peter Alfrey Jeff Stoddard Susan Chugha Julie Bandy Megan Blount Hailey Holden Jordan Ramsey Emily Hendrickson Caitlin Cabral Carole Ann Guay Jon Williams Krista Clay Megan Hamilton</p>	40 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Alycia Minshall Nate Beasley Janine DiLorenzo	
Total Hours			10,952
Total Not-To-Exceed Cost Estimate			\$1,743,220



4.0 Project Resources and Hours

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

Table 2: Project Resources

CL	Role	Rate	Resource Name	Total Est Hours	Total Est Cost
2	EM	\$270	Nicole Becnel	32	\$ 8,640
1	LPM	\$215	Ed Daranyi	64	\$ 13,760
4	GPM	\$175	Jennifer Elwood	32	\$ 5,600
4	GPM	\$175	Alex Flower	440	\$ 77,000
4	GPM	\$175	Arisara Miller	540	\$ 94,500
4	GPM	\$175	Chris Fanikos	680	\$ 119,000
4	GPM	\$175	Danielle Joslyn	1,720	\$ 301,000
4	GPM	\$175	Dawn Webb	64	\$ 11,200
4	GPM	\$175	Dina Nash	700	\$ 122,500
4	GPM	\$175	Fei Zou	700	\$ 122,500
4	GPM	\$175	Jason Hargrove	32	\$ 5,600
4	GPM	\$175	Lloyd Butler	160	\$ 28,000
4	GPM	\$175	Jeff Stoddard	1,234	\$ 215,950
4	GPM	\$175	Jim Strassenburgh	60	\$ 10,500
4	GPM	\$175	Buffy Cranford	1,030	\$ 180,250
4	GPM	\$175	Nicole Spears	560	\$ 98,000
4	GPM	\$175	Peter Alfrey	400	\$ 70,000
4	GPM	\$175	Susan Chugha	300	\$ 52,500
4	GPM	\$175	Julie Bandy	320	\$ 56,000
5	SS	\$80	Emily Hendrickson	32	\$ 2,560
5	SS	\$80	Alycia Minshall	16	\$ 1,280
5	SS	\$80	Caitlin Cabral	16	\$ 1,280
5	SS	\$80	Carole Ann Guay	32	\$ 2,560
5	SS	\$80	Grady Black	1,220	\$ 97,600
5	SS	\$80	Hailey Holden	32	\$ 2,560
5	SS	\$80	Janine DiLorenzo	32	\$ 2,560
5	SS	\$80	Jon Williams	32	\$ 2,560
5	SS	\$80	Jordan Ramsey	32	\$ 2,560
5	SS	\$80	Megan Blount	312	\$ 24,960
5	SS	\$80	Megan Hamilton	16	\$ 1,280
5	SS	\$80	Krista Clay	96	\$ 7,680
5	SS	\$80	Nate Beasley	16	\$ 1,280
			TOTALS	10,952	\$ 1,743,220



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



5.0 Project Hours and Costs per Month

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

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

Table 3: Project Costs by Month

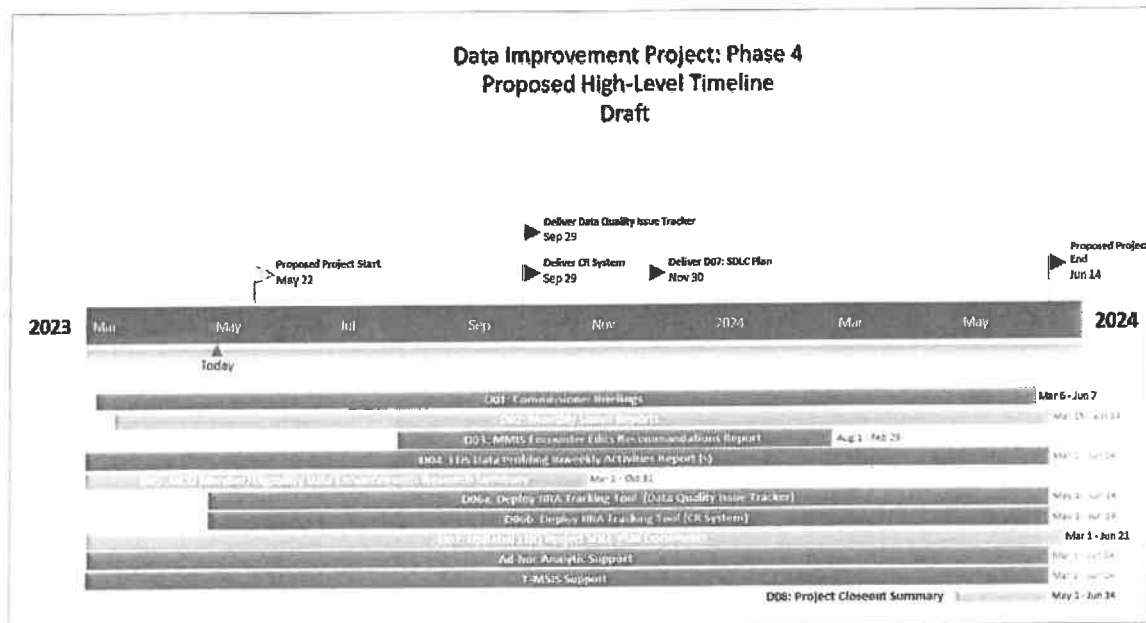
Month	EM Hrs	LPM Hrs	GPM Hrs	SS Hrs	Total Est. Hours per month	Estimated Cost per month
Month 1	2	4	621	84	711	\$ 116,795.00
Month 2	2	4	621	84	711	\$ 116,795.00
Month 3	2	4	691	84	781	\$ 129,045.00
Month 4	2	4	671	84	761	\$ 125,545.00
Month 5	2	4	716	184	906	\$ 141,420.00
Month 6	2	4	711	184	901	\$ 140,545.00
Month 7	2	4	611	154	771	\$ 120,645.00
Month 8	2	4	606	154	766	\$ 119,770.00
Month 9	2	4	698	156	860	\$ 136,030.00
Month 10	2	4	673	156	835	\$ 131,655.00
Month 11	2	6	668	160	836	\$ 131,530.00
Month 12	2	6	608	160	776	\$ 121,030.00
Month 13	4	6	543	120	673	\$ 106,995.00
Month 14	4	6	534	120	664	\$ 105,420.00
Totals	32	64	8,972	1,884	10,952	\$ 1,743,220.00



6.0 High-Level Timeline

Figure 1, below, illustrates the proposed high-level timeline for the activities proposed in this SOW.

Figure 1: Proposed High-Level Timeline



**BerryDunn Authorized Signature**

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

DocuSigned by:
Nicole Y. Bechel
4E322BB4203F4C8

Signature

5/1/2023

Date

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

[Handwritten Signature]

Signature

5/1/23

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 MITA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where



states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that participate monthly.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (8/2015 to 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SSA findings and focus on the DHHR goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
- *Provider Enrollment (PEA) Project (07/2011 to 12/2012).*
Nicole supported the Bureau with her project, program and portfolio management and subject matter expertise as they implemented health care reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the state.



- *5010 Refresh Project (10/2011 to 08/2013).*
Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.
- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*
Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.
- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
 - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
 - *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
 - *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
 - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
 - *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
 - *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
 - *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
 - *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*



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



Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).

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

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

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

Presentations

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

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



Eduardo Daranyi, MEd, PMP

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

Overview

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

Experience

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

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



Readiness Review (2019 to present).

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

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



health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

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

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

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

- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to*



03/2008).

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

- Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:
 - *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)*
 - *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)*
 - *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
 - *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 to 05/2020)*
 - *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
 - *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*



- *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*
- *Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*



- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*
- **West Virginia Department of Health and Human Resources (DHHR) (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.
- **Maine Department of Health and Human Services (DHHS) – Independent Verification & Validation (IV&V) and QA Services (04/2008 to 06/2012).** BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

BerryDunn also performed a point-in-time readiness assessment for several Pharmacy system initiatives for Maine DHHS, including a HIPAA 5010 transaction set readiness assessment and a pharmacy-related provider portal. Ed served as project manager for this assessment.
- **North Carolina Office of the State Auditor – Independent Audit of the State IT Services Enterprise Project Management Office (EPMO) (04/2007 to 06/2007).** BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

Martin's Point Health Care (2005 to 2007). Ed led a project management effort for Martin's Point Project Management for Health Insurance Portability and Accountability Act (HIPAA) Compliance



initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

Goold Health Systems (1999 to 2005).

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

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

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

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

Presentations

Flexible Contracting and Contracting Best Practices, Presentation for MESC 2014, 8/19/2014
Project Management/Testing, Presentation for NESCSO workshop (2017)

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together towards the future and MESC 2020: Where we are today and where we will be tomorrow.



Jennifer Elwood, FSA, MAAA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal and Consulting Actuary
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Bachelor of Science in Mathematics – Statistics and Psychology, University of Connecticut Master of Science in Statistics, University of Connecticut Fellow, Society of Actuaries (FSA) Member, American Academy of Actuaries (MAAA)

Overview

Jennifer has 25 years of experience as a healthcare actuary across a wide range of actuarial functions. Her experience includes projecting population cost experience and risk for pricing and risk sharing, especially in new initiatives, including extensive work related to implementing the Affordable Care Act in commercial insurance, and projecting the state-level impact of expanding the Medicaid population. She also has experience analyzing risk-sharing arrangements, performing claim liability analysis, rate development, budget development, and financial monitoring.

Experience

BerryDunn (formerly Compass Health Analytics) (08/2014 to present). As a principal and co-leader of BerryDunn's actuarial services, Jennifer assists nonprofit managed care organizations with claim liability analysis, rate development, budget development, and financial monitoring. She works with her clients to develop large employer claims projections, estimate the impact of proposed benefit mandates for state government policy makers, and assist state regulators with market conduct rate review audits.

- **West Virginia Bureau for Medical Services (BMS) - Technical Assistance and Project Support (TAPS) Phase IV (05/2022 to present).** As SME, Jen has contributed knowledge and analysis to task requests. Jen also coordinates and leads particular research and tasks that fall under the scope of TAPS, such as the review and impact analyses of CMS rules that requires financial knowledge.
- **Community HealthChoices – Actuarial Services including rate review, valuation, and forecasting (2019 to present).** Jennifer provides consultative actuarial services to a large MLTSS managed Medicaid organization. These services include actuarial liability valuations, rate offer assessments, forecasting, strategic consulting, and ad hoc analyses.
- **Massachusetts Center for Health Information and Analysis – Mandated Benefit Reviews (2011 to present).**



Jennifer is the lead actuary on mandated benefit review projects (from 2015 to present). The actuarial component of the mandate review estimates the impacts to insurance premiums of proposed insurance mandate bills before the Massachusetts legislature. In addition, statutory and clinical analysis are provided by BerryDunn as part of the report.

- **Community Care Behavioral Health – Actuarial Services including rate review/pricing, valuation, and forecasting (2008 to present).**

Jennifer is one of three actuaries providing actuarial services to a large behavioral health managed Medicaid organization. These services, which she began providing in 2015, include actuarial liability valuations, capitation rate proposals, rate offer assessments and negotiations, forecasting, and ad hoc analyses.

WellPoint, Inc. (1998 to 2014). Jennifer served in several roles of increasing responsibility during her 16-year tenure with WellPoint:

- **Northeast Regional Pricing Director (2012 to 2014).** Responsible for individual and commercial pricing function in Connecticut, Maine, and New Hampshire, managing a team of three state pricing directors and seven analysts; coordinated rate development and preparation of rate filings and certifications for individual and commercial business; collaborated with state and regional leadership to achieve profitability and membership goals; provided strategic guidance to state pricing directors and ensured corporate directives were met while balancing state objectives
- **Northeast Regional Lead and Connecticut Pricing Director (2010 to 2012).** Responsible for commercial pricing function in Connecticut and managing a pool of seven analysts supporting the pricing needs of Connecticut, Maine, and New Hampshire; supported the Connecticut State President as a strategic business partner and primary actuarial point of contact for internal and external constituents; participated in quarterly forecast and annual planning process; served as the actuarial representative for ongoing Connecticut Exchange Board and Department of Insurance meetings with health insurance carriers
- **Northeast Valuation Director (2008 to 2010).** Responsible for the valuation function in Connecticut, Maine, and New Hampshire; managed staff of eight associates responsible for estimating claim liabilities and other reserves for commercial, consumer, and FEP business; directed development of statutory and GAAP reporting, including support of actuarial certification and SOX control testing and certifications; coordinated actuarial portion of external audits and supported DOI audits
- **Northeast Forecasting Director (2006 to 2008).** Responsible for forecasting commercial and individual business in Connecticut, Maine, and New Hampshire; managed staff of five associates responsible for developing the annual budget, quarterly forecasts, and detailed monthly variance analysis; acted in a peer review capacity by fully developing all assumptions and reconciling them with ongoing pricing and valuation development



- **Connecticut and New York Forecast Lead (2001 to 2006).** Developed the annual budget and quarterly forecasts for the Connecticut Commercial Business and Anthem Health and Life of New York; provided key financial information to executive management through forecast modeling and analysis of monthly results; developed and enhanced forecasting models to increase speed and accuracy of forecast process



Alex Flower

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	BS, 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.

Relevant 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 state-wide 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 8 teams. He developed and maintained Mortgage Operations dashboards for tracking internal measures and KPIs.

Education and Certifications

BS, Business Administration, Grand Canyon University



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.



Chris Fanikos, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	3.5
Certifications and Education:	BA, History and Middle Eastern & Islamic Studies, New York University MPH, Public Health Policy, Yale University

Overview

Chris is an experienced public health professional with experience in corporate, health care, 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.

Relevant Experience

BerryDunn (11/201 to present). Chris is a senior consultant in BerryDunn's Health Analytics Practice Group.

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 and 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 to 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.

Education and Certifications

BA, History and Middle Eastern & Islamic Studies, New York University
MPH, Public Health Policy, Yale University



Danielle Joslyn

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in 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

Cotiviti (October 2016 to November 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 (September 2015 to September 2016). Danielle worked as a Senior Software Developer to design and develop re-usable 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 (January 2012 to September 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 (February 2007 to January 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.


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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Associate in Applied Science, Office Administration, West Virginia University Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University Certified Professional Coder, American Academy of Professional Coders Certified Outpatient Coder, American Academy of Professional Coders Prosci® Certified Change Practitioner LEAN Six Sigma Green Belt Certification Certified Project Management Professional

Overview

Dawn is a manager in BerryDunn's Medicaid practice, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has over 25 years of experience in medical claims processing and revenue cycle management – including over eight years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of 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 ten established APDs.
 - *Payment Error Rate Measurement (PERM) Project (05/2018 to present).*
Dawn is serving as the project manager for the PERM project, managing budgets and project deliverables, and working closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for West Virginia. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to present).*
Dawn served first as project subject matter expert (SME) and then as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and to provide analysis of cost savings opportunities for BMS.
 - *TPL Procurement (05/2019 to 03/2022)*
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team



members to help ensure the project team meets the project objectives and the client expectations.

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

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

- **State of Alaska, Division of Legislative Audit (DLA) – National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 to 09/2019)**

Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

- **United States Virgin Islands (USVI) – Project Management and APD Support (10/2022 to present).**

Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.

Valley Health Systems, Inc. (12/2009 to 07/2017). Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including West Virginia, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

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

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

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

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.



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.



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:	<p>Bachelor of Science in Applied Mathematics, Tongji University</p> <p>Master of Science in Mathematical Science, University of Massachusetts Lowell</p> <p>SAS Certified Advanced Programmer for SAS 9</p>

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

BMC Health System (formerly HealthNet Plan) (August 2012 to July 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 (August 2010 to August 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.



Jason Hargrove, MBA, PMP

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

Overview

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

Experience

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

- **Alaska Division of Health Care Services (HCS) – MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to present)**
Jason is the project manager for BerryDunn's team assisting HCS with visioning, researching, and developing an MMIS solicitation
- **West Virginia Bureau for Medical Services (BMS) – Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to present).**
Jason is the project manager for BerryDunn's team assisting BMS with the implementation of their overall EVV solution, which includes support in several key areas:
 - Strategic planning
 - Organizational Change Management
 - Requirement development
 - RFP draft narratives and supporting documentation
 - Certification planning and assistance
 - APD development and updates
 - Evaluation and scoring support / facilitation
 - Vendor on-boarding
 - Vendor deliverable review



- o UAT planning and support

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

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

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

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

- **Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017).** Jason served in several capacities on the Ohio project including business development, project



leadership and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams and coordinating on-site staff. During the project, the named Implementation Manager left the organization and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation and client relations.

- **Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016).** As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.
- **Iowa Medicaid Enterprise PBM (04/2012 to 10/2013).** Jason led the reprocurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SME's in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.
- **Utah CMS certification support (2012).** Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.
- **Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 to 10/2011).** Jason served as the Implementation Project Manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and management, meeting facilitation, risk and issue management, report management and client engagement. This project also included more intensive training of state staff and product education, change request management and issue resolution.
- **Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 to 05/2009).** As the Project Manager, Jason worked closely with internal business leads and the client to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders and the incumbent vendor. Typical project activities included meeting facilitation, requirement, risk and action item



management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client and business SMEs to successfully certify the system.

- **Maine Medicaid Mailroom and BPO (HCFA, UB, ADA) and Medical Prior Authorization.** Jason served as internal project executive to manage the conversion of an existing sole-source contract to a sub-contract and establish a new department within the company. In this role, Jason participated in negotiations with several potential prime vendor partners to develop pricing and a successful bid strategy. After source selection, he worked with a new partner to define operational processes, quality standards and technical integration. New office space and hiring was completed successfully. Jason served as the implementation lead and the business unit manager for the new and existing services as part of this project, including staff management, quality oversight, and vendor/client relations.

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



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 bi-monthly 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.



Jeff Stoddard

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consulting Senior Manager
Years of Experience Relevant to Proposed Role:	18 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 data, technology, and analytics leader. He focuses on building data management, analytic, and reporting systems. Jeff excels in interacting with diverse stakeholders, building consensus, and developing successful working relationships while achieving project objectives. He maintains a keen focus on finding solutions that help clients achieve operational efficiencies, improve quality of care, and reduce costs.

Experience

BerryDunn (12/2019 to present)

As a data management and strategy senior 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)

- *Data Improvement Project (12/2019 to present).*
Jeff provides technical leadership and analytic support to assist the state in understanding and addressing data quality and usability issues affecting its Medicaid program.
- *Enterprise Data Solution Project (06/2020 to present).*
Jeff provides subject-matter expertise and analytic support to assist the state in implementing their multi-source data warehouse solution.
- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to 03/2022).*
Jeff provided technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.
- *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.



Jim Strassenburgh

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

Overview

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

Experience

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

- **West Virginia Department of Health and Human Resources (10/2019 to present)**
 - *Enterprise Data Services and Data Source Program (01/2020 to present).*
Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
 - *PATH/IES Program (10/2019 to present).*
Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.
- **Massachusetts HIX/IES Entities – IV&V Services (05/2014 to 09/2019).**
Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.
- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).**
As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS



attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

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

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

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

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

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

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



Buffy Cranford, EdD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	Bachelor of Arts in English, Communications, University of Nebraska Master in Management, Doane University Certified Project Management Professional (PMP) Prosci®

Overview

Buffy brings more 20 years of experience in designing specifications, testing, and implementing software solutions on a variety of projects and platforms, including IBM® Curám. She specializes in organizational change management, knowledge management, communications, training, and documentation design and implementation. Her experience includes serving in dual roles as the State of Nebraska, Department of Labor Employment Service Manager for the Virtual Service Unit, and as the Wagner-Peyser Program Coordinator. Previously, she has also served in private industries specializing in human resources, client services, technical documentation writing and editing, training, billing, and contracts. Competencies include Federal Medicaid and Labor programs, stakeholder assessment, quality assurance, project management, program management, RFP writing, communications, credibility building, and client management.

Relevant Experience

BerryDunn (12/2019 to present)

West Virginia Department of Health and Human Resources (DHHR) – People’s Access to Help (PATH) DDI Project Management (11/2020 to present).

As a senior consultant, Buffy serves as the OCM Lead on the West Virginia People’s Access to Help (WV PATH) project. She manages the identification, development, and implementation of organizational change management and operational readiness activities. This includes updating and expanding the OCM Project Plan in alignment with the RFP, tracking and producing OCM deliverables, providing status reports for OCM and Training responsibilities and tasks, and working in collaboration with the state of West Virginia to streamline communications.

West Virginia Bureau for Medical Services (BMS) – COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).

She has also led the COVID-19 task tracking team and built strong relationships with State Bureaus by coordinating communications, escalating tasks, and monitoring the progress of tasks and adherence to Federal governance.



Cognosante (08/2018 to 11/2019)

As a senior associate and organizational change manager, Buffy has served as the OCM Lead on numerous projects, primarily Medicaid and Economic Assistance eligibility and their associated programs, and the Arkansas Juvenile programs. She managed all aspects of Organizational Change Management for Medicaid Eligibility, based on all requirements set forth in the RFP. This included collaborating with State and System Integrator teams in creating goals, timelines, deliverable expectation documents, and project status reports; serving as a track expert in design and JAD sessions of the new eligibility systems for Medicaid and Economic Assistance; and reviewing resolutions in finalizing OCM, training, communications, change impact, knowledge transfer, and roll-out plans.

State of Nebraska (04/2016 to 08/2018)

As the administrator of the Eligibility and Enrollment Solution project team, Buffy managed multiple projects including the new Medicaid eligibility system, asset verification system, procurements, and contract management. She led all facets of organizational change management, communication, training, and documentation design and implementation, which included the following responsibilities:

- Write and update Communications, Training, and OCM plans, and align with contractual requirements.
- Guide and manage creation and approval of Training approach, the design of process and training manuals, virtual training, and ongoing support materials.
- Analyze Request for Proposals (RFPs) and contractual requirements to ensure vendors deliver accurate design and functionality.
- Develop detailed project plans for each component of organizational changes, training, documentation development and communication approaches, by identifying sequential activities.

She also served as the Information Systems and Technology Privacy Officer, overseeing security of Medicaid software and hardware. This included creating and updating the Privacy Office Policy and Program Manual to create a prescriptive set of processes and procedures aligning with Federal and State of Nebraska Information Technology security policy and standards.

ACCESS Nebraska Lincoln Customer Service Center (06/2013 to 04/2016)

Buffy oversaw the direction and organization of the Medicaid and Long-Term Care services. She performed organizational change management analysis, reorganized the Lincoln Customer Service Center, assigned workers into skill sets, minimized phone queues, and reduced call wait times from forty-five minutes to five minutes or under for over two years. She created and implemented yearly strategic plans for both Customer Service Centers by examining resources, goals and objectives of the agency; updated and monitored performance metrics and developed dashboard monitoring strategies to ensure clients received efficient and accurate customer service; collected and analyzed data and trends for the Medicaid and Long-Term Care call centers, and implemented strategies to increase service levels; directed multifunctional



programs, improved efficiency, and increased the monthly quality assurance accuracy percentage with an average of 97.5 to 98%; and reviewed interactive voice response systems to reduce phone queues and improve customer service, and served on a workgroup reviewing upgrades to the interactive voice response systems.

Nebraska Department of Labor (10/2011 to 06/2013)

Buffy designed and implemented the Virtual Services Unit call center for improving the federally funded labor exchange by retaining and marketing to new and existing employers and adding and attracting skilled labor to the NEworks system. She designed an intense training program, including quality assurance guidelines and scripts, for new Workforce Coordinators, and conducted follow-up training.

Buffy also served as the program coordinator for the Wagner-Peyser Act, assisted in creating and communicating policy initiatives, procedures, and goals for WagnerPeyser employees. She developed federal grant applications and corrective action plans; designed an online training program and conducted weekly trainings for the NEworks online labor exchange system to assist in learning new technology; and assisted in designing the yearly federal incentive for enhancing the administrative delivery of employment and training activities in the Nebraska career centers, Workforce Regions, and surrounding communities.

TerraScan Inc. (03/2007 to 01/2011)

Buffy managed the Human Resources department, including overseeing employment, job postings, resume review, interviewing, hiring, maintaining sensitive documentation, and training of new and existing staff on policies and procedures.

Computer Services Inc. (11/2001 to 03/2007)

As a technical writer and application product specialist, Buffy managed online and hardcopy documentation for product releases and enhancements. She supervised work teams responsible for designing enhancements, programming, and testing banking software across the nation; conducted comprehensive testing of banking software; and designed help files and created articles for company announcements.

MindVision Software (10/2000 to 11/2001)

Buffy answered software and eSellerate technical support questions daily by email and phone. She edited the User's Guide for Installer VISE, conducted comprehensive testing of software and eSellerate web site, and performed on-site training of new software to Lincoln Stars administrators.

Education and Certifications

EdD, Educational Leadership and Administration, General, Doane University (in progress)
 Master's Degree, Management, Doane University
 BA, English, Theatre English, University of Nebraska
 Certified Project Management Professional (in progress)



A. Nicole Spears, MBA

Proposed Project Role:	Subject Matter Expert
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)**
 - *Managed Care Program Management (06/2022 to present).* Nicole serves as the program manager for the managed care related projects under the enterprise portfolio management structure. Nicole provides oversight to the project managers of the projects within the Mountain Health Promise (MHP) Procurement Assistance, Mountain Health Trust (MHT) Procurement Assistance, Mental Health Parity, WV Children's Health Insurance Program (CHIP) MCO Transition, and Maximum Out-of-Pocket (MOOP) projects. Nicole works with each of the project teams to help ensure adequate staffing is available throughout the project, project milestones are met, and solutions are reasonable and viable options for the client. Additionally, she provides executive-level communications regarding project progress, risks, issues, and key decisions.
 - *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.
- *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 (formerly DXC Technology) (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, role based access security (RBAC), all system documentation for her subsystems (Design Expectations Document, Detailed System Design, Business Design Documentation, etc.), led her subsystem through the Medicaid Enterprise Certification Toolkit (MECT), and provided subject matter expertise for testing and training.

SR Advise (01/2016 to 12/2017). Nicole worked as a director and account manager to provide creative, strategic and executive services to clients within the healthcare marketing space. She developed and implemented operational plans and strategies to meet clients' individual business objectives and focused on improving organizational performance through enhanced business processes and management strategy planning. Nicole spearheaded a new internship program as well as business growth in the public health arena. She also directed Request for Proposal (RFP) response development, including coordination with both sub and prime vendors.



Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company.

SVC, Inc. (07/2012 to 12/2015). Nicole worked as the director of business development and a senior health policy advisor as a systems and managed care SME. She managed high-profile, complex program and system implementations reporting to and advising senior leadership. Nicole assisted in the development of key Medicaid pilot programs, including ones developed to serve as ACA Medicaid expansion vehicles, 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 programmatic changes on operations, systems, and vendors. Nicole also led non-financial business operations and business development for the company, including business development and procurement, hiring and onboarding of staff, website management, and office operations.

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

- *Medicaid Technical & Systems Integration Manager (02/2011 to 04/2012)*
Nicole worked as the technical & systems integration manager in the office of Medicaid Policy & Planning to manage, approve, and track Indiana Medicaid system changes and ensure successful integration with vendors. She directed relationship and project management, including leading staff and team members through new initiatives and constant change. As the Managed Care technical SME with extensive knowledge of both the MMIS and vendor systems, Nicole helped establish and design the new SDLC change control board. This team oversaw scope and budget, ensured requirements and design served business needs, and provided the opportunity for improved system integration by giving vendors a voice at the table. In this role, she also directed staff in executing audits and quality control on MMIS and MCO systems changes & MCO performance reporting to help ensure vendor compliance. She was also a key stakeholder in Indiana's initiative to determine its response to the Affordable Care Act (ACA) and recommended actions to the unit's compliance team on contractual delinquencies.
- *Board Director (08/2010 to 02/2011)*
As Board Director of the Professional Licensing Agency (2010 to 2011) Nicole managed staff operations, including establishing & achieving group goals and ensuring training and employee growth. She established strong relationships with related organizations and governing bodies in which boards had a stake and resolved board issues, including bringing boards into federal compliance and developing new compliancy division.
- *Medicaid Policy & Procedure Analyst (07/2008 to 08/2010)*
As Policy & Procedure Analyst in the Office of Medicaid Policy & Planning (2008 to 2010) Nicole directed the 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.

Keystone Builders (04/2005 to 07/2008). Nicole worked as a new homes sales consultant to assist clients with building new residential real estate properties. She managed all Indiana communities and launched the "On Your Lot" Division. This role included overseeing vendors and sales assistants and managing all customer sales. Nicole directed sales operations resulting in the 2 most profitable years in the state for the builder, achieving 300%+ higher profit over prior years.



Peter Alfrey, PMP, Prosci® CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in Journalism and Communication, Spanish Minor, University of Oregon Master of Arts in History, Providence College Certified Project Management Professional LEAN Six Sigma Green Belt Certification Prosci® Certified Change Practitioner

Overview

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

Experience

BerryDunn (03/2014 to present).

- **West Virginia Bureau for Medical Services (BMS)**
 - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).*
 Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects. EPMO projects and programs include:
 - *Organization Development Services (06/2022 to present)*
 - *Public Health Emergency (PHE) Support (12/2021 to present)*
 - *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I, II and III (10/2020 to present)*
 - *MCO Encounter Data Quality—Phases I and II (06/2020 to 02/2022).*
 - *Mental Health Parity and Behavioral Health Services Support (05/2020 to 09/2022)*



- *Data Improvement Project—Phases I, II and III (09/2019 to present).*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present).*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to 06/2021), and MHT Re-Procurement (03/2020 to 08/2022)*
- *Contact Tracing (04/2020 to 09/2022).*
- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise (MHP) Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to 09/2022)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).*
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019). Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 02/2018). Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*
- **West Virginia Children's Health Insurance Program (WVCHIP)**
 - *Operational Readiness Review (09/2020 to 01/2021)*
 - *MCO Transition Planning Project Phases I and II (03/2019 to present). Out of Pocket Maximum (05/2021 to present)*

West Virginia Department of Health and Human Resources (DHHR) - Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019).

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).**
Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.
- **Vermont Green Mountain Care Board (GMCB) – Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014).**
Peter led the efforts to help the GMCB build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.



- **Maryland Health Benefit Exchange (HBE) – Independent Verification & Validation (IV&V) for Maryland's HBE Implementation (03/2014 to 04/2014).**

As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

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

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

Presentations

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

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

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

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

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

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

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



conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016

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



Susan Chugha, Prosci® CCP

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

Overview

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

Experience

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

- **West Virginia Bureau for Medical Services (BMS).**
 - *Substance Use Disorder (SUD) Waiver Initiative Project Phase V (10/2016 to present).*
Susan manages the current ongoing phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducts deliverable review on all documents. She performs research on SUD services, CMS requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on time for federal submission. During this most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development,



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

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

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

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all 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 are in compliance, compared service descriptions to federal and state guidance, and analyzed pages for overall accuracy.

- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Project (07/2021 to present).*

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

- *American Rescue Plan Act of 2021, Section 9817 Home and Community Based Services (HCBS) Implementation Plan (05/2022 to present).*

As project lead, Susan oversees the day-to-day operations for this project, conducts research, and monitors the successful completion and submission of project and federal deliverables.

- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 to present).*

Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.

- *Organization Development (OD) Services Project (05/2022 to present).*

As a business analyst (BA) on the OD project, Susan assists with client relations, retreat planning and coordination, research, and writing assignments that help to inform strategic planning documents, in addition to other identified deliverables per the agreed upon SOW.

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

As program manager for the CSEDW Phase IV project, Susan oversees the project team through oversight, project management, technical assistance, and monitoring risks and issues. Prior to Phase IV of the project, Susan helped monitor progress on the preparation of the CSEDW waiver renewal application.



In 2018 Susan served as the project coordinator for the CSEDW project. Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.

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

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

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

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

- **Project Specialist – Assistant Vice President**
 - Lead Project Specialist for semi-annual Global Distribution Summits.
 - Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
 - Lead Project Specialist for annual client event that hosted over 1600 industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
 - Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all



around the US and assisted with follow-up after each program to track our successes and determine where improvement was needed.

- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.

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

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

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

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



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.

Relevant 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.
- *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.

Education and Certifications

BS, Social and Behavioral Sciences, Indiana University



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.



Alycia Minshall

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

Overview

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

Experience

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

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

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

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



proposals; case studies; and meeting notes. She helped to ensure that all materials are well written, accurate, properly researched, objective, concise, and focused, as well as helping to ensure consistency in voice, brand, and tone across messaging channels.

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

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

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

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

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

- ***Student Director (8/2010 to 12/2011)***
Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center and manage campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.
- ***Writing Center Tutor (8/2008 to 12/2011).***
Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



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.



Carole Ann Guay

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

Overview

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

Relevant Experience

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

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



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

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



Grady Black

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Support Staff
Years of Experience Relevant to Proposed Role:	<1 year
Certifications and Education:	Bachelor of Science in Data Analytics, Bentley University (in progress)

Overview

Grady is a member of the BerryDunn Health Analytics Practice Group supporting our project staff with a history in data analytics, database management, applied statistics, and programming.

Experience

BerryDunn (05/2022 to present). As a member of the BerryDunn Health Analytics Practice Group, Grady assists the team and clients with business analysis, data mapping documentation, data quality profiling and analysis.

Bentley University (09/2019 to present). Some of Grady's project work with the university includes:

- *Regression Analysis*
Grady collaborated with other students on a regression analysis-based case report on solar energy usage in the city of Boston, culminating in an analytical report.
- *Introduction to Database Management*
Grady collaborated with other students to create a Microsoft Access database application for a fictitious liquor distribution company. He presented the application and database to his colleagues, depicting the layout of the application including creation of tables, forms, reports,



Hailey Holden

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

Overview

Hailey is a leadership-driven professional with more than 10 years of experience creating solution-focused, and collaborative partnerships in large volume and high stress situations. She is an excellent communicator with a passion for positive change and brings a variety of skills such as timeline management, schedule deconflicting, client-contractor coordination, personnel and resource management, data and project management, event planning and marketing, recruitment, and process improvement.

Relevant Experience

BerryDunn (07/2022 to present)

Hailey is a project coordinator for BerryDunn's Medicaid practice group.

El Paso County Department of Human Services (04/2021 to 07/2022)

As an Adolescent Lead Social Caseworker, Hailey provided over 2,500 hours of intensive casework services to families and children yearly by developing productive working relationships with clients and creating a collaborative partnership between team members and stakeholders. During this period, she successfully identified the needs of clients to create and implement solution-focused plans of action, helped ensure the successful completion of short- and long-term goals by monitoring and documenting progress, and conducted research and investigation to ensure proper reporting, prosecution, and documentation of child abuse and neglect reports. At times, she also performed assessments of new cases to help ensure clients' safety, referred clients to appropriate resources creating a substantial decrease in repeat infractions, and provided accurate updates and testimony in court hearings and mediations. Hailey also acted in a supervisory role to members of the casework team, training and overseeing new caseworkers.

Lake County Court Appointed Special Advocate (CASA) Program (04/2016 to 04/2021)

Hailey provided a vital service by advocating for the best interests of abused and neglected children involved in child welfare proceedings. On the client side, she provided representation and testimony in open court on behalf of the client's best interest and collaborated with the local



Department of Child Services and service providers to achieve best outcomes. On the organization's side, she pioneered volunteer recruitment, training, and retention efforts for other 100 community volunteers, including developing and implementing marketing plans, planning community outreach events to drive community awareness and involvement, and designing and distributing program marketing materials such as flyers, brochures, postcards, and other outreach items. She also compiled statistical data to best represent the organization, allowing for a marked increase of both state and national grant funding, and initialized and maintained a secure database to store documentation and client demographic information. These tasks required innovative solutions to help ensure proper programming under a strict budget.

Second Chance for Pets Network (01/2015 to 01/2017)

As a board member, Hailey evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people. To develop partnerships for raising funds, she conducted outreach to and collaborated with local businesses. She also assisted in recruiting and training volunteers and monitored animals in their respective foster homes, helping ensure all needs were met.

Education and Certification

BA, Psychology, Purdue University
Member of 21st Century Scholars Program



Janine DiLorenzo

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

Overview

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

Experience

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

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

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

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



for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and also wrote copy for website and social media outreach channels.

- ***AmeriCorps*VISTA, Brockton Parents Magazine (06/2011 to 08/2011)***
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000-copy distribution via businesses, schools, municipal buildings, and social service agencies.

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



Jonathan Williams

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

Overview

Jon is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before being submitted to clients.

Experience

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

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

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

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

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



Jordan Ramsey, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	<p>Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign</p> <p>Master of Arts in English: Professional Writing, Southeast Missouri State University</p> <p>Lean Six Sigma Green Belt Certification</p> <p>Poynter ACES Certified Editor</p>

Overview

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

Experience

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

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

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

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



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

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

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

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

Other Teaching Experience (2006 to 2010).

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



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

West Virginia State Tax Department (10/2019 to present). 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.



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.

Relevant 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.



Krista Clay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	<p>Bachelor of Arts in Psychology, Marshall University</p> <p>CITI Program: Social and Behavioral Responsible Conduct of Research, Credential ID 45589043</p> <p>CITI Program: Social / Behavioral / Epidemiological Research Investigators, Credential ID 45589023</p>

Overview

Krista is an experienced project coordinator with a variety of software and administrative skills. She has demonstrated success in supporting social media and marketing growth campaigns, overseeing community events, and in managing employee schedules and assigning duties as needed.

Experience

TEK Systems (07/2022 to present)

- **BerryDunn (12/2022 to present).** Krista's role as Project Coordinator role as Project Coordinator includes maintaining continuous coordination and communication with Project Managers on scheduling meeting, managing agendas, action items, meeting notes, and correspondence, as well as researching the latest data and resources for updated information within each project. She assists with other items such as monthly status reports, news roundups, and project trackers. She works on the following projects for West Virginia:
 - *Implementation Support Grant*
 - *Substance Use Disorder 1115 Waiver Project Phase V*
 - *Payment Error Rate Measurement RY2023 Phase II*
 - *Data Improvement Project Phase 3*
 - *Data Improvement Project Phase 4*
 - *Public Health Emergency Support Phase II*
 - *MITA AA-A Annual Update 2021*
 - *TAPS Subprojects*
 - *Mental Health Parity Project*
 - *Mobile Crisis SPA*



Altis Movement Technologies (05/2022 to 07/2022). Krista served as Personal Assistant to CEO & Special Projects Coordinator to maintain strong relationships with exceptional communication and interpersonal skills between various departments. She managed project budgets, organized tasks and responsibilities into execution, and used situational awareness and critical thinking skills to solve problems. Krista was responsible for taking meeting notes, planning meetings, organizing schedules and calendars, and providing updates on current projects

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 also 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.



Nathan Beasley

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	BS, Criminal Justice, Husson University Associates, Criminal Justice, Southern Maine Community College

Overview

Nathan is an experienced project coordinator, bringing almost five years of experience in project assistance and legal support. He brings a strong analytical ability and a record of adherence to project deadlines and parameters.

Experience

BerryDunn (12/2022 to present)

Nathan serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-governmental clients.

Preti Flaherty (05/2021 to 12/2022)

As a paralegal and legal assistant, Nathan worked in the Finance/Real Estate & Corporate groups reporting to the practice group chair as well as one associate attorney. He was responsible for drafting and finalizing contracts, closing documents, financial documents from templates, and created original documents in a timely and accurate manner; as well as for transactional closing coordination, reviewing documents for completion, and due diligence checks.

Bernstein Shur (10/2020 to 05/2021)

Nathan served as a legal assistant, responsible for drafting title commitments and policies for the Monument Title group, conducting reconciliations of financial expenses within the Monument Title group, and introducing new processes to better ensure accurate record keeping. Additionally, he met with various companies to determine a new title drafting software to be used by the group, then shared relevant findings with stakeholders.

The Hartford (08/2019 to 10/2020)

As an ability analyst, Nathan made final decisions regarding the approval and denial of individual's short-term disability claims. He investigated claims, building evidence to make a final determination; worked on large group claims with more detail specific clients; and was



identified early on as an exceptional analyst and placed on a special project to assist other analysts with their caseloads.

Bergen Parkinson (04/2018 to 08/2019)

As a legal assistant, Nathan managed the schedules of two partners within the firm's real estate group. He ensured that deadlines were being met with mediations and real estate transactions, created template document sets for the practice group to use to ensure accurate and consistent closings, and introduced a new system to reduce the amount of time spent during annual report filing season, cutting the amount of processing time substantially.



Appendix B: Deliverable Dictionary

Table 4: List of Deliverables and Descriptions

Deliverable #	Deliverable Name	Deliverable Description
D01	Commissioner Briefing	A monthly dashboard slide that will be developed and delivered to the BMS leadership. The report will include a status of project deliverables, milestones and any associated project issues and risks.
D02	Monthly Status Reports	A monthly report that will be developed and delivered to the BMS project sponsor. The report will include a status of project deliverables, milestones and any associated project issues and risks.
D03	MMIS Encounter Edits Recommendations Report	A report that will include recommendations to improve data quality across MMIS encounters.
D04	EDS Data-Profiling Biweekly Activity Report	A biweekly report that outlines the findings from the weekly PUB-MART schema analytic layer review.
D05	MCO Member/Eligibility Data Enhancements Research Summary	A research summary that will provide analysis to integrate MCO member data into the BMS systems.
D06	Deploy Jira® projects to production	A data quality tool that will be developed to help track data quality issues across the DHHR/BMS and implement a CR system for the use of BMS and its vendors.
D07	Updated EDQ project SDLC plan documents	A report or set of documents that will outline an updated SDLC process and approach.



D08	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at project close. The summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms

The following are definitions of terms, abbreviations, and acronyms used in this document.

Table 5: Definitions of Terms, Abbreviations, and Acronyms

Term, Abbreviation, or Acronym	Definitions
BMS	Bureau for Medical Services
ACA	Affordable Care Act
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
DDI	Design, Development, and Implementation
DHHR	Department of Health and Human Resources
DHHS	U.S. Department of Health & Human Services
DIP	Data Improvement Project
DW/DSS	Data Warehouse/Decisions Support System
E&E	Eligibility & Enrollment
EDQ	Encounter Data Quality
EDS	Enterprise Data Solution
EM	Engagement Manager
EPMO	Enterprise Portfolio Management Office
GPM	General Project Manager
HBE	Health Benefit Exchange
HHS	Health and Human Services
HIPAA	Health Insurance Portability and Accountability Act
HIX	Health Insurance Exchange
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update



Term, Abbreviation, or Acronym	Definitions
IBM®	International Business Machines Corporation
IES	Integrated Eligibility System
IV&V	Independent Verification and Validation
LPM	Lead Project Manager
MCO	Managed Care Organization
MES	Medicaid Enterprise System
MESC	Medicaid Enterprise Systems Conference
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OCM	Organizational Change Management
PATH	People's Access to Help
PERM	Payment Error Rate Measurement
RFP	Request for Proposal
SDLC	System Development Lifecycle
SIT	System Integration Testing
SLA	Service Level Agreement
SME	Subject Matter Expert
SOW	Statement of Work
SS	Support Staff
SUD	Substance Use Disorder
T-MSIS	Transformed Medicaid Statistical Information System
UAT	User Acceptance Testing
USVI	United States Virgin Island
WV	West Virginia, State
WVCHIP	West Virginia Children's Health Insurance Program



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

Jeffrey H. Coben, MD
Interim Cabinet Secretary

Cynthia E. Beane
Commissioner

TO: DHHR Finance
FROM: Lucinda Carroll *LC*
Procurement Specialist, BMS Procurement Services
DATE: May 3, 2023
RE: PF1223649, CDO BMS23*33 Funding Memo

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

The service period will be 05/22/23 through 06/14/24 and we anticipate payment to be split between SFY24 and SFY25 per the table below:

June 2023 through April 2024 on PR07 in SFY24 for \$1,382,245.00
May 2024 through Jun 2024 on PR07 in SFY25 for \$360,975.00

Total: \$1,743,220.00

Thank you for your time and consideration in this matter. If you have questions or need additional information, please feel free to contact me at 304-352-4235 or lucinda.l.carroll@wv.gov.



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

Jeffrey H. Coben, MD
Interim Cabinet Secretary

Cynthia E. Beane
Commissioner

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

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

DATE: May 3, 2023

RE: PF1223649, CDO BMS23*33

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

The purpose of this delivery order is to assist BMS by providing support for the Data Improvement Project (DIP) – Phase IV. The total cost is not to exceed \$1,743,220.00. The service period will be 05/22/2023-06/14/2024.

Thank you for your time and consideration in this matter. If you have questions or need additional information, please feel free to contact me at 304-352-4235 or lucinda.carroll@wv.gov.

Robert Price
Agree