State of West Virginia
Delivery Order

Order Date: 05-08-2023

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 BMS2300000034 1	**Procurement Folder:**	1224245
Document Name:	EDS Project Phase IV	**Reason for Modification:**	
Document Description:	EDS Project 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	**Requestor Name:** Lucinda L Carroll
BERRY DUNN MCNEIL & PARKER LLC	**Requestor Phone:** (304) 352-4235
2211 CONGRESS ST	**Requestor Email:** lucinda.l.carroll@wv.gov

PORTLAND   ME   04102

US

Vendor Contact Phone: 6813138905   **Extension:**

Discount Details:

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

Total Order Amount:	$1,660,160.00

Purchasing Division's File Copy

CH 5/16/23

PURCHASING DIVISION AUTHORIZATION
DATE: _Tara___ 5/16/2023_
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION
DATE: _Beverly Toler 5-17-23_
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid Enterprise Data Solution Implementation and the Centers for Medicare & Medicaid Services Certification Project Phase IV (EDS Project Phase IV)

Dates of Service: 06/01/2023-12/31/2023

Total: $1,660,160.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$9,245.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2023-06-01	2023-12-31				

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:
Lead Project Manager: Base Year One

Hourly Rate: $215.00

Eduardo Daranyi 43 Hours @ $215 = $9,245

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$21,060.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2023-06-01	2023-12-31				

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:
Engagement Manager: Base Year One

Hourly Rate: $270.00

Nicole Becnel 78 Hours @ $270 = $21,060

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$1,181,775.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2023-06-01	2023-12-31				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:
General Project Manager: Base Year One

Hourly Rate: $175.00

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

Peter Alfrey 140 Hours @175 = $24,500
Ryan Wrisley 1,076 Hours @ $175 = $188,300
Meghann Slaven 862 Hours @ $175 = $150,850
Julie DuPuis 842 Hours @ $175 = $147,350
Jim Strasenburgh 875 Hours @ $175 = $153,125
Ed Crawford 275 Hours @ $175 = $48,125
Jeff Stoddard 945 Hours @ $175 = $165,375
Cynthia Taylor 990 Hours @ $175 = $173,250
Dot Ball 110 Hours @ $175 = $19,250
Curtis Boyd 558 Hours @ $175 = $97,650
Dawn Webb 80 Hours @ $175 = $14,000

Total Hours 6,753 Hours @ $175 = $1,181,775

Line		Commodity Code	Quantity	Unit	Unit Price	Total Price
4		80101600	0.00000		$0.0000	$448,080.00
Service From		Service To	Manufacturer		Model No	Delivery Date
2023-06-01		2023-12-31				

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

Extended Description:
Project Management Support Staff: Base Year One

Hourly Rate: $80.00

Shelly Schram 220 Hours @ $80 = $17,600
Matthew Oatten 1,024 Hours @ $80 = $81,920
Sarah Vintorini 1,036 Hours @ $80 = $82,880
Cate Poling 1,015 Hours @ $80 = $81,200
Kourtney Kirk 945 Hours @ $80 = $75,600
Azba Hotelwala 1,015 Hours @ $80 = $81,200
Alycia Minshall, Caitlin Cabral, Carole Ann Guay, Emily Hendrickson, Janine DiLorenzo, Jon Williams, Jordan Ramsey, Megan Hamilton, Nate Beasley 346 Hours @ $80 = $27,680

Total 5,601 Hours @ $80 = $448,080

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April 28, 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 Medicaid Enterprise Data Solution Implementation and the Centers for Medicare & Medicaid Services Certification Project Phase IV under our master contract (CMA #HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 7 months. BerryDunn agrees to a SOW start date effective June 1, 2023.

Assuming a start date of June 1, 2023, the work would then conclude December 31, 2023.

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

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

Best Regards,

DocuSigned by:

Nicole Y. Bechel

Nicole Y. Bechel
Principal
681-313-8905

Robert Price
Agree

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Staffing Plan and Scope of Work for

The West Virginia Department of Health and Human Resources and Bureau for Medical Services

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

(EDS Project Phase IV)

Prepared for CMA #HHR21*03

Submitted by:
Nicole Becnel, PMP®, Principal
Eduardo Daranyi, PMP®, Principal
Ryan Wrisley, PMP®, Manager
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207.541.2244
edaranyi@berrydunn.com
nbecnel@berrydunn.com

Submitted on:

April 28, 2023

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

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

1.0   Key Information

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

1.1   General

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

- In December 2021, IBM® announced the 14-month DDI timeline would exceed 14 months due to changes required to incorporate the National Provider Index (NPI) into the EDS design. Due to the EDS implementation extending beyond the 14-month timeline, the State requested continued PM services support from BerryDunn as outlined within this SOW.

- The objective of Phase IV of the EDS Project is to continue PM support for nine months after the updated go-live date of March 31, 2023. In addition, this project's scope

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includes services to support formal CMS certification and federal reviews. This SOW will support the following activities:

o   Continue PM support services throughout the implementation of the EDS

o   Continue providing data governance framework support, including facilitating meetings with Executive Data Governance Committee (DGC) chairs and the Data Stewards Team, reviewing memoranda of understanding (MOUs), and helping ensure the EDS Project aligns with DHHR data governance expectations

o   Continue aiding the State to support requirements management, vendor deliverable management, vendor and vendor contract management, and testing

o   Continue providing support to the State to obtain formal CMS certification and facilitation of the federal review process

o   Provide DDI validation support to the State post go-live to help ensure full stability of the EDS

1.2 Medicaid Information Technology Architecture (MITA) Goals and Objectives

Phase IV of the EDS Project will also aid the State in meeting several of its identified MITA-specific goals, such as:

- CM 2.1 – Increase the use of evidence-base clinical and appropriate services, including preventive services

- BR 1.2 – Standardize processes for data validation and reconciliation

- Gen 3.2 – Improve data access, analysis, and reporting to support decision-making

1.3 Assumptions

Estimates for this SOW are based on the following assumptions:

- The cost of services and timeline in this SOW assumes services are scoped to occur across seven months. The level of effort defined within this SOW is a point-in-time estimate that might require updates after the delivery or rebaseline(s) of the vendor-supplied project schedule.

- Schedule delays resulting from the action or inaction of federal, State, and vendor stakeholders might impact the overall project schedule and require change requests to help ensure BerryDunn's PM services continue for six months post go-live of the EDS.

- The State leadership team will consist of Shaun Charles, Brandon Lewis, and Sarah Young as the project sponsors.

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

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

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

- State staff and relevant stakeholders from bureaus and agencies will make themselves available for pertinent EDS implementation activities. If these individuals or others are not available or do not participate in the sessions, the project schedule, scope, and cost might be impacted.

- This SOW assumes the State project sponsor(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.

- This SOW assumes prompt review and input from the Department of Purchasing. Any delays in reviewing contract documents might impact the overall timeline for the work that BerryDunn will complete under this contract.

- The BerryDunn leadership team will consist of Ryan Wrisley and Meghann Slaven as the project leads.

- The level of effort defined within this SOW assumes BerryDunn will not be responsible for the development and/or maintenance of documentation to support the DGC, EDS implementation, and/or EDS maintenance and operations outside those documents detailed within this SOW. If DHHR requests assistance developing and/or maintaining documents outside of those within this SOW, those documents will be subject to review and approval by the DHHR project sponsor and BerryDunn.

- The level of effort defined within this SOW is based upon formal certification of the solution under CMS guidelines for the Streamlined Modular Certification (SMC) approach. Deviations from the tasks, deliverables, and/or activities defined within CMS' SMC guidelines might result in changes to this SOW.

- The level of effort defined within this SOW assumes that BerryDunn will not serve as "testers" throughout the life of the project.

- The level of effort specific to Vendor Management and Contract Management Services is limited to the solutions implementation and operations period through the close of this SOW.

- The level of effort defined within this SOW might be impacted by any delay and/or project issue that arise as a result of vendor performance.

- The cost of the services described in this SOW is included in the latest EDS Implementation Advance Planning Document Update (IAPD-U) under project identifier

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WV-2023-01-17-MMIS-IAPDU-EDS, which was submitted to the federal partners with an estimated cost of $1,660,160 ($1,494,144 federal financial participation [FFP]/$166,016 State share) for PM services through December 2023. Any additional services added to this SOW might require an update to the State's current IAPD-U to allocate additional funds for PM services.

- BerryDunn will support DHHR through a future EDS Advance Planning Document (APD) submission over the course of this SOW. For the purposes of this SOW, BerryDunn assumed the need to update the current EDS IAPD for Federal Fiscal Year (FFY) 2023 and FFY 2024.

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

- BerryDunn will explore strengthening partnerships with states and other territories, such as the United States Virgin Islands (USVI) and leveraging tools and procedures.

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2.0   Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
1.0	**Engagement Oversight** *Service Approach* BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables. BerryDunn's project leadership will regularly meet with the EDS Project leads and other key team members to discuss project status and issues impacting timely completion of the project work; they will also oversee BerryDunn staff, services, and review of deliverables. *Deliverable(s)* • No Project Management Office (PMO) deliverables will be supplied in support of Engagement Oversight. *Completion Criteria* Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.	Eduardo Daranyi Nicole Becnel Peter Alfrey Ryan Wrisley	245
2.0	**Monthly Project Status Reporting** *Service Approach* BerryDunn will supply monthly project status reports, Commissioner Briefings, and CMS executive steering committee reports to DHHR project sponsors and/or federal partners to provide objective reporting on project health. The project status reports intend to supply higher-level executive-level reporting on the status of project deliverables and timeline as well as associated project issues and risks. The project status reports will be developed, reviewed, and finalized during the first two weeks of each	Eduardo Daranyi Peter Alfrey Ryan Wrisley Meghann Slaven Matthew Oatten Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo	84

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	calendar month for the life of the project. The monthly Commissioner Briefing and monthly CMS executive steering committee report will include overall project status, key project activities, high-level issue/risk updates, and upcoming target milestones. *Deliverable(s)* • D01: Commissioner Briefing • D02: Monthly Status Reports *Completion Criteria* Monthly Project Status Reporting will be deemed complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.	Jon Williams Jordan Ramsey Megan Hamilton	
3.0	**PM Support** *Service Approach* BerryDunn will provide PM services in alignment with Project Management Institute® (PMI®) standards. The list below contains suggested Project Management Book of Knowledge® (PMBOK®) knowledge areas that will serve as the baseline for project management services: • Communications Management • Risk and Issue Management • Stakeholder Management • Scope Management • Project Integration Management • Quality Management • Cost Management • Schedule Management Upon project initiation, BerryDunn will document agreed-upon expectations for the management of the project inclusive of: • Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn and State-owned meetings (as requested) • Management of project logs (action items, risks, issues, and decisions)	Ryan Wrisley Meghann Slaven Matthew Oatten Cate Poling Kourtney Kirk Azba Hotelwala Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton	1,995

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	• Location of project documentation repository in an agreed-upon SharePoint location		
	• Support from additional resources and subject matter experts (SMEs) for project needs		
	BerryDunn will also facilitate weekly meetings with State project sponsor(s) and project leads to discuss project status across each project area. BerryDunn will use this time to notify the State of project risks, issues, and/or items that might require its attention. The team will also use this time to plan risk and issue mitigation and responses.		
	Leverage and Reuse		
	BerryDunn will explore strengthening partnerships with states and other territories (such as the USVI) and leveraging tools and procedures.		
	PM Support will be provided across all tasks throughout the scope of this implementation.		
	Deliverable(s)		
	• D03: Meeting Materials and Notes		
	• D04: Project Logs (Action Item, Risk, Issue, and Decision Logs)		
	Completion Criteria		
	PM Support will be deemed complete upon signature acceptance of the Project Closeout Summary.		
4.0	**Data Governance Activities** *Service Approach* BerryDunn will continue providing data governance framework support to the DGC and Data Stewards Team, as well as external departments and agencies involved in data management processes, in collaboration with DHHR. BerryDunn will continue facilitating meetings with the Executive DGC chairs and the Data Stewards Team, support MOU and interagency agreement reviews, and help ensure the EDS Project aligns with DHHR data governance expectations. BerryDunn will also develop a repository of data governance policies, procedures, and documentation to support key stakeholders and the DGC. BerryDunn will support the implementation of the committee's	Ryan Wrisley Meghann Slaven Jim Strasenburgh Jeff Stoddard Sarah Vintorini Ed Crawford	560

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	planned operational goals and objectives. *Deliverables* • **D05: Data Governance Repository** *Completion Criteria* Data Governance Activities will be deemed complete upon signature acceptance of the Project Closeout Summary.		
5.0	**Requirements Management and Support** *Service Approach* BerryDunn will provide PM services in support of the requirements analysis, system design, development, and implementation phases of the EDS Project. During the requirements analysis, system design, and implementation phases, BerryDunn will work with the State to review the vendor's proposed solution for all requirements included in the Request for Proposals (RFP) (inclusive of proposed gaps). After requirements review, the project team will work with the vendor to refine and validate the solution for each EDS requirement. Throughout the design, testing, and implementation phases of the EDS Project, the State and BerryDunn will work with the vendor to clarify and validate the design for each requirement. To help ensure the requirements represent the State and vendors agreed-upon solution, BerryDunn might assign a track lead for each group of requirements to assist the State through requirements DDI. The groups of requirements will be based on the vendor's proposed approach to requirements validation. The track leads would be the State's primary points of contact for each requirement area and would work with BerryDunn and the vendor to define, clarify, and test each requirement's design. BerryDunn will also be responsible for meeting facilitation and/or note-taking (when requested by the State) during discussions in which requirements might be impacted. Although the vendor is responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability	Ryan Wrisley Meghann Slaven Sarah Vintorini Julie DuPuis Kourtney Kirk	1,083

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	matrix (RTM), BerryDunn will be responsible for helping ensure the RTM reflects the State and vendors agreed-upon solution. *Deliverable(s)* • No PMO deliverables will be supplied in support of Requirements Management and Support. *Completion Criteria* Requirements Management and Support will be deemed complete upon signature acceptance of the Project Closeout Summary.		
6.0	**Deliverable Management and Support** *Service Approach* BerryDunn will utilize its standardized approach to monitor and provide management oversight for the quality of project deliverables, artifacts, and other vendor-submitted work products. BerryDunn will work to establish expectations early in the development process when there is still time to adjust course on a deliverable or task without significant impacts to the project schedule. Our approach will consist of the following elements: • BerryDunn will be responsible for the facilitation, tracking, and management of vendor- and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location. • BerryDunn will develop, review, and finalize deliverable acceptance criteria with the vendor and State. • BerryDunn will participate in vendor-facilitated draft reviews of contract deliverables. • BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements. • BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables. • BerryDunn will collaboratively resolve comments on vendor-owned deliverables. • BerryDunn will create and obtain signature approval on each PMO- and vendor-owned	Ryan Wrisley Meghann Slaven Sarah Vintorini Curtis Boyd Jim Strasenburgh Cate Poling	2,415

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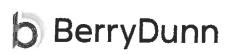| Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	project deliverable. Please refer to Appendix B for more information. • BerryDunn will review vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn will work with the vendor to help ensure all deliverables have approved acceptance criteria validated by the State. BerryDunn will also work with the State and vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also develop comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments. Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable and milestone by means of a deliverable acceptance form (DAF). BerryDunn will also work with the EDS vendor to help ensure both BerryDunn and the EDS vendor's deliverable review processes are aligned. *Deliverable(s)* • D06: Deliverable/Milestone Acceptance Forms *Completion Criteria* Deliverable Management and Support will be deemed complete upon signature acceptance of the Project Closeout Summary.		
7.0	**Federal Review and Certification Support** *Service Approach* BerryDunn will provide overall PM services support for required federal reviews and certification. This includes assisting the State with development of the approach, process, and methodologies used to manage the project and create associated deliverables required for federal reviews and certification. DHHR is engaged in discussions with CMS relative to the SMC approach for the EDS. BerryDunn will work with the State and federal partners to identify documentation needed to assist	Jim Strasenburgh Shelly Schram	360

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services for scheduling, facilitating, and managing any federal on-site visits or reviews. Key SMC activities and milestones include: • Define Outcomes Statements • Define Evaluation Criteria and Required Evidence • Define Key Performance Indicators (KPIs) • Certification Readiness Planning • Operational Readiness Review • Pre-Certification KPI Reporting • Certification Request Letter • Certification Review (DHHR anticipates the certification review to occur six months after go-live) • System Acceptance Letter • Post-Certification KPI Quarterly Reporting BerryDunn will provide support services to the State by leveraging and reusing the State's existing functionality and processes to help prevent unnecessary duplication. The services outlined in support of these certification-related services were modeled after SMC guidance from CMS. Any deviation from CMS guidance might impact the project's scope, timeline, and/or budget. *Deliverable(s)* • D07: State-Completed Certification Checklists • D08: Completed Certification Evidence Packets and Related Artifacts *Completion Criteria* Federal Review and Certification Support will be deemed complete upon signature acceptance of the Project Closeout Summary.		
8.0	**Vendor Management and Contract Management Services** *Service Approach* BerryDunn will provide overall Vendor Management	Ryan Wrisley Meghann Slaven Sarah Vintorini Kourtney Kirk	595

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	and Contract Management Services support for the EDS Project. This includes the following activities: • BerryDunn will monitor and evaluate contractor activities, including deliverables and Service Level Agreements (SLAs) against contract terms. • BerryDunn will evaluate the existing EDS vendor to help ensure continued best value of the existing contract. • BerryDunn will monitor contractors' internal risk management controls and financial condition. • BerryDunn will assist in maintaining effective relationships with vendors. BerryDunn will also assist in defining, communicating, and implementing ways to improve vendor relationships. • BerryDunn will also assist the State in collecting and retaining Vendor Performance Scorecard Data. This data will contain performance review records based on the EDS contract's KPIs and SLAs. The Vendor Management and Contract Management Services outlined within this SOW will be limited to the solutions implementation and initial operation. *Deliverable(s)* • D09: Vendor Performance Scorecard Data *Completion Criteria* Vendor Management and Contract Management Services will be deemed complete upon signature acceptance of the Project Closeout Summary.		
9.0	**APD Support** *Service Approach* BerryDunn will develop and assist in facilitating the approval of an IAPD-U for the EDS to help ensure that the project continues to maintain buy-in and financial support from relevant federal partners. BerryDunn has included a minimum of two APDs within the budget. BerryDunn also included the number of hours associated with the creation of the APD to support operations in this SOW.	Ryan Wrisley Meghann Slaven Matthew Oatten Dawn Webb Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson	240

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	Deliverable(s) • D10: APD(s) *Completion Criteria* The APD Support phase of the project will be deemed complete upon signature approval of the Project Closeout Summary.	Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton Nate Beasley	
10.0	**Testing Support** *Service Approach* BerryDunn will provide resources to assist DHHR with System Integration Testing (SIT), User Acceptance Testing (UAT), Pilot Testing (where applicable), and Operational Readiness Testing (ORT) efforts. Assistance during SIT, UAT, and ORT is outlined as follows: • BerryDunn will provide relevant expertise to assist DHHR with the review of SIT cases and results. BerryDunn will also assist with the monitoring of SIT defects and the impact to overall project health. • BerryDunn will assist DHHR with updates to the UAT Plan, as needed, as well as UAT test scenarios. This will require close coordination of both the vendor's and State's UAT Plans. • BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes, issues, and defects identified over the course of this testing phase. • BerryDunn will assist DHHR with the facilitation and validation of the vendor's services as they relate to ORT. BerryDunn will also be responsible for those services necessary to assist DHHR in validating that it is operationally ready for system go-live. To help ensure the requirements represent the agreed-upon solution between the State and vendor, BerryDunn's assigned track leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the vendor to define, clarify, and test each requirement's design.	Jim Strasenburgh Cynthia Taylor Dot Ball Julie DuPuis Kourtney Kirk	3,186

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	Deliverable(s) • D11: UAT Plan Updates as needed (the UAT Plan was developed and approved in Phase I of the EDS Project) *Completion Criteria* The Testing Support phase will be deemed complete upon signature acceptance of the Project Closeout Summary.		
11.0	**DDI Validation** *Service Approach* In Phase I of the EDS Project, the decision was made to continue the legacy solution operations three months post go-live to help ensure full stability of the EDS. Based on this decision, BerryDunn will support the State with the transition from the legacy DW/DSS to the EDS. BerryDunn will support the activities to be completed by the vendor during the implementation/cutover from the existing solution to the new solution at go-live, including the three-month parallel testing of the legacy and EDS solutions, defect triaging, and security and privacy safeguard reviews. *Deliverable(s)* • No PMO deliverables will be supplied in support of DDI Validation. *Completion Criteria* The DDI Validation phase of the project will be deemed complete upon signature approval of the Project Closeout Summary.	Ryan Wrisley Meghann Slaven Jim Strasenburgh Ed Crawford Cynthia Taylor Dot Ball Julie DuPuis Cate Poling	1,575
12.0	**Project Closeout** *Service Approach* BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. *Deliverable(s)* • D12: Project Closeout Summary	Eduardo Daranyi Nicole Becnel Peter Alfrey Ryan Wrisley Meghann Slaven Kourtney Kirk Alycia Minshall Caitlin Cabral Carole Ann Guay	137

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	Completion Criteria BerryDunn Project Closeout services will be considered complete when the DHHR project sponsor or their designee formally accepts the complete EDS solution from the vendor and signs the Project Closeout Summary.	Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton	
Total Hours			12,475
Total Not-To-Exceed Cost Estimate			$1,660,160

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3.0 Project Resources and Hours

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

- EM = Engagement Manager ($270/hour)

- LPM = Lead Project Manager ($215/hour)

- GPM = General Project Manager ($175/hour)

- SS = Support Staff ($80/hour)

Table 2: Project Resources

CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
3	LPM	$215	Eduardo Daranyi	43	$9,245
2	EM	$270	Nicole Becnel	78	$21,060
4	GPM	$175	Peter Alfrey	140	$24,500
4	GPM	$175	Ryan Wrisley	1,076	$188,300
4	GPM	$175	Meghann Slaven	862	$150,850
4	GPM	$175	Julie DuPuis	842	$147,350
4	GPM	$175	Jim Strasenburgh	875	$153,125
4	GPM	$175	Ed Crawford	275	$48,125
4	GPM	$175	Jeff Stoddard	945	$165,375
4	GPM	$175	Cynthia Taylor	990	$173,250
4	GPM	$175	Dot Ball	110	$19,250
4	GPM	$175	Curtis Boyd	558	$97,650
4	GPM	$175	Dawn Webb	80	$14,000
5	SS	$80	Shelly Schram	220	$17,600
5	SS	$80	Matthew Oatten	1,024	$81,920
5	SS	$80	Sarah Vintorini	1,036	$82,880
5	SS	$80	Cate Poling	1,015	$81,200
5	SS	$80	Kourtney Kirk	945	$75,600
5	SS	$80	Azba Hotelwala	1,015	$81,200

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CL #	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
5	SS	$80	Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton Nate Beasley	346	$27,680
			Total Hours and Total Cost:	**12,475**	**$1,660,160**

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4.0 Project Hours and Costs Per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project. These estimates might fluctuate based on the project's status.

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	12	7	969	801	1,789	$238,400
Month 2	11	6	964	800	1,781	$236,960
Month 3	11	6	964	800	1,781	$236,960
Month 4	11	6	964	800	1,781	$236,960
Month 5	11	6	964	800	1,781	$236,960
Month 6	11	6	964	800	1,781	$236,960
Month 7	11	6	964	800	1,781	$236,960
Total	78	43	6,753	5,601	12,475	$1,660,160

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5.0   High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

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

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

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6.0   Organizational Structure

The following diagram illustrates the organizational structure of the BerryDunn EDS Project Management Team.

Figure 2: Organizational Structure

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BerryDunn Authorized Signature

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

DocuSigned by:

Nicole Y. Becnel

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4/28/2023

Signature

Date

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

5/3/23

Signature

Date

Appendix A: Resumes

Eduardo Daranyi, MEd, PMP®

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

Overview

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

Experience

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

- **West Virginia 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; Affordable Care Act (ACA) analysis, and advisory services; ICD-10 compliance; Eligibility & Enrollment (E&E) systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; Children's Health Insurance Program (CHIP) implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives. Since Ed joined the West Virginia project on a full-time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ

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over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.

- o *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 Managed Care Organizations (MCOs); and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

- o *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to present).*
  Ed provides Engagement Management oversight to help the State transition members from a fee-for-service (FFS) model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

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

- o *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
  As Engagement Manager, Ed with the BerryDunn team of specialists, developed

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

o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present).*
Ed has been the Engagement Manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

o *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present).*
Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the Data Warehouse/Decision Support System (DW/DSS), develop two RFPs, 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.

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- o QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008).
  Ed provided quality assurance services for West Virginia's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (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:

  - o Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)

  - o State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)

  - o Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)

  - o Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)

  - o Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)

  - o Managed Care Organization Transition: Phase II (03/2020 to 02/2021)

  - o WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)

  - o MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)

  - o Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)

  - o Lead project manager until 6/30/2019; principal in charge as of 7/1/2019

  - o Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)

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

  - o Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 to 05/2020)

  - o Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)

  - o Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)

  - o Lead project manager until 6/30/2019; principal in charge as of 7/1/2019

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- o Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)

- o Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)

- o WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)

- o Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)

- o WVCHIP Data Warehouse/Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)

- o Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)

- o Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)

- o MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)

- o Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)

- o Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)

- o Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)

- o West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)

- o Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)

- o Income Maintenance Manual Update Project (09/2016 to 09/2017)

- o Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)

- o Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)

- o Safe at Home APD Update (08/2015 to 11/2016)

- o RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)

- o ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)

- o Eligibility and Enrollment APD (06/2015 to 09/2015)

- o PPACA Workgroup Oversight (2012 to 2015)

- o 5010 Refresh Project (2012 to 2015)

- o State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to

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2014)

- o *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- o *MITA 3.0 Organizational Redesign (2013)*
- o *Policy Workflow Assessment (2013)*
- o *Prior Authorization Forms Revisions (2013)*
- o *ePrescribing Helpdesk and Support (2012)*

- **West Virginia DHHR (06/2012 to present).** In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.

- **Maine Department of Health and Human Services (DHHS)** – *Independent Verification & Validation (IV&V) and QA Services (04/2011 to 06/2012).*
  BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing, and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

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

- **North Carolina Office of the State Auditor** – *Independent Audit of the State IT Services 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 HIPAA Compliance initiative. He performed an organizational assessment and

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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 toward the future and MESC 2020: Where we are today and where we will be tomorrow.

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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 DHHR BMS.**

    o *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.

    o *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

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development, RFP draft narratives and supporting documentation, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and UAT planning and support.

o *IES/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 PATH. PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), 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, deliverables, and risk and issue management.

o *APD Assistance (07/2010 to present)*
Nicole is the Lead Project Manager overseeing the development and approval of 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, PERM, and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.

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

o *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

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serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

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

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

o *Provider Management Support (7/2019 to 1/2021)*
Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the MITA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multistate 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.

o *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative

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"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.

o   *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.

o   *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.

o   *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.

o   *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
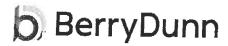
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Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.

- o *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*
  Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:

  - o *MCO Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*

  - o *MMIS Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*

  - o *MHT MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*

  - o *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*

  - o *MHP Implementation (Coordinated Care Management) (03/2020 to 06/2020)*

  - o *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*

  - o *SPRS (02/2020 to 05/2021)*

  - o *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*

  - o *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*

  - o *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*

  - o *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*

  - o *MMIS PERM Phase II (05/2020 to 05/2021)*

  - o *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*

  - o *MMIS Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*

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

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- o *5010 System Refresh (2012 to 2015)*
- o *HIT Statewide Strategic Plan development (2012 to 2014)*
- o *Provider Enrollment (2012 to 2015)*
- o *MITA 3.0 Organizational Redesign (2013)*
- o *Policy Workflow Assessment (2013)*
- **New Jersey Division of Medical Assistance and Health Services** – *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).* As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

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

  - **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help 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 help 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

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Peter Alfrey, PMP®, Prosci® CCP

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

Overview

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects and serving as a program manager for the West Virginia DHHR and BMS, 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 BMS**

  - *EPMO (09/2018 to present).*
    Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and APD development; and research and tracking of industry trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's Medicaid enterprise system, MCO and data/analytics programs providing program oversight. EPMO projects and programs include:

    - *Organization Development Services (Scheduled to start 06/2022)*

    - *Public Health Emergency (PHE) Support (12/2021 to present)*

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- *Access to Care (09/2021 to present)*

- *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I and II (10/2020 to present)*

- *MCO Encounter Data Quality—Phases I and II (06/2020 to 02/2022)*

- *Mental Health Parity and Behavioral Health Services Support (05/2020 to present)*

- *Data Improvement Project—Phases I, II and III (09/2019 to present)*

- *Medicaid EDS Implementation and CMS Certification Project (09/2019 to present)*

- *MHT MCO Procurement Assistance Project Phases I and II (06/2019 to 06/2021), and MHT Re-Procurement (03/2020 to present)*

- *Contact Tracing (04/2020 to 09/2020)*

- *Coordinated Care Management Project Management and Procurement Assistance / MHP Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to present)*

o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).*

o *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019).* Peter was the project manager for the SUD waiver initiative leading the implementation of the "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration effective January 1, 2018, to December 31, 2022, which allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. He managed a large, cross-functional team focused on areas such as annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

o *AVS Project Management Services and Procurement Assistance (04/2017 to 02/2018).* Peter served as project manager for the AVS project that supported the State's objective of procuring AVS-related services for the State's Medicaid program. Under Peter's leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported

the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.

- o *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*
  Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and user acceptance testing (UAT) support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

- **West Virginia Children's Health Insurance Program (WVCHIP)**

  - o *Operational Readiness Review (09/2020 to 01/2021)*

  - o *MCO Transition Planning Project Phases I and II (03/2019 to present).*
    Peter provides project oversight to help the State integrate the WVCHIP member population with the State's Medicaid population to the MHT managed care program by January 1, 2021.

  - o *Out of Pocket Maximum (05/2021 to present)*

- **West Virginia DHHR.**

  - o *IES/PATH DDI Project Management (08/2018 to 11/2019).*
    Peter served as the organizational change management (OCM) lead for the IES, providing strategic direction and oversight to the project team. Peter built a joint team of individuals from the IES vendor, Optum, and BerryDunn to launch the OCM program and supporting communications campaign. During that time, OCM became a core component of the IES/PATH project. Through Peter's leadership, the OCM team created an OCM plan to launch OCM efforts for the project; created a communications toolkit and communications materials; and conducted over 50 interviews with individuals across DHHR for an OCM readiness assessment to support the IES/PATH project.

- **New Jersey Division of Medical Assistance and Health Services** – *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).*
  Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect

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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)** – *IV&V for Maryland's HBE Implementation (03/2014 to 04/2014).*
  As a business analyst, Peter worked with Maryland's PMO and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

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

Health Dialog (07/2006 to 11/2008). As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multifaceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and CMS. He also managed cross-functional implementation teams, maintained communications with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as PMO 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 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

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Ryan Wrisley, MHCDS, PMP®

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

Overview

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

Experience

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

- **Maryland Health Benefit Exchange** – *IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).*
  Ryan served as a quality assurance analyst for a project valued at approximately $200 million dollars. He worked closely with the project manager and the project team who performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the executive leadership of the project.

- **West Virginia Offices of the Insurance Commissioner (OIC)** – *Health Insurance Exchange Planning (06/2011 to 03/2013).*
  Ryan served as Project Manager for the development of a Strategic Technology Plan to guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition, he has provided program and portfolio management of the OIC's various planned initiatives that must take place in order for the HIX to become fully operational and comply with federal healthcare reform requirements.

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- **Maine Human Resources Division (HRD) –** *System Analysis and Requirements Development for Procurement of Human Resources Management System (03/2012 to 08/2012).*
  Ryan served as project manager for the development of requirements for an RFP to procure a Human Resources Management System (HRMS) for the State of Maine's HR Division. Ryan's responsibilities included:
  - o Conducting a Current Environment Assessment
  - o Documenting process flows for each of the major business processes
  - o Identifying issues, challenges, and bottlenecks within each process flow
  - o Conducting research of peer state agencies
  - o Developing technical and functional requirements for inclusion in an RFP to procure a new HRMS

- **Massachusetts Office of the State Auditor (OSA) –** *IT Roadmap (04/2012 to 06/2012).*
  Ryan served as project manager for BerryDunn's engagement to develop a 48-month Technology Roadmap. His responsibilities included:
  - o Conducting a Current Environment Assessment
  - o Identifying issues, challenges, and bottlenecks with current systems and processes
  - o Conducting research of peer state agencies
  - o Developing technology initiatives to address the issues, challenges, and bottlenecks
  - o Providing a Technology Roadmap to guide the State Auditor's Office over a four-year horizon

- **New Hampshire Liquor Commission (NHLC) –** *Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012).*
  Ryan served as project manager for a systems planning and RFP development project for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse Inventory Management System, Liquor Inventory and Distribution System, and supporting back-office systems.

MaineHealth Accountable Care Organization (MHACO) (2015 to 09/2019). As the senior director of data operations and analysis, Ryan was responsible for data operations, analytics, and clinical applications teams for the MHACO. He procured an enterprise-wide multi-million-dollar Population Health Management Software Tool; was responsible for the aggregation of

EMR/Electronic Health Records (EHR) data across different EMR/EHRs as well as claims data from commercial payors and CMS MSSP; developed analytic strategy and plan tied to operating plan to enable data-driven decisions; developed a data request triage process as well as data request help-desk process, and implemented help-desk software; and oversaw the legacy internally built clinical integration registry and the transition to the new Population Health Tool.

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

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

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

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Meghann Slaven

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

Overview

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

Experience

BerryDunn (10/2017 to present)

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

- **West Virginia BMS**

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

     As project lead, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, quality) and is a primary point of contact for project constraints that require escalation. West

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

o *West Virginia MCO EDQ Assistance Project (09/2020 to 02/2021).*

As a business analyst, Meghann provided guidance and assistance to the project management team with research developing deliverable templates and content, including a Best Practices Research Summary and Data Strategy Roadmap.

o *MITA State Self-Assessment (SS-A) Maintenance (08/2020 to 04/2021).*

As a business analyst, Meghann provided guidance and assistance to the project management team to update the West Virginia's MITA 2018 HIT Companion Guide Report.

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

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

o *Gap Analysis and Project Management Services (10/2017 to 06/2018).*
As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of the capstone project

deliverable. As part of a team analyzing over 2,600 impacts from the ACA on West Virginia Medicaid's policy, systems, and business processes, Meghann assisted with research, writing, and assessment activities to support the development of a compliance gap analysis deliverable.

- Puerto Rico Medicaid Program (PRMP)

  o *Puerto Rico Medicaid Management Information System (PRMMIS) Project (11/2020 to 12/2020).*

    As an SME, Meghann provided guidance and assistance to the project management team to update PRMP's MMIS APD and corresponding federal funding documentation.

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

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

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

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

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

Clay Center for the Arts and Sciences (08/2005 to 09/2006). As a group reservations coordinator, Meghann scheduled group visits to Avampato Discovery Museum, Clay Center, and West Virginia Symphony Orchestra. She was responsible for maintaining and analyzing the database regarding group attendance, and assisted with museum programs and special events.

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

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Julie DuPuis, MPA

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

Overview

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

Experience

BerryDunn (07/2022 to present).

- **West Virginia DHHR –** *Medicaid Enterprise System and Enterprise Data Solution projects (07/2022 to present).*
  Julie serves the Medicaid Enterprise System and Enterprise Data Solution projects as a SME supporting data profiling, testing and requirements gathering support.

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

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

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

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Jim Strasenburgh

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

Overview

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

Experience

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

- **West Virginia DHHR (10/2019 to present)**

  o *Enterprise Data Services and Data Source Program (01/2020 to present).*
  Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.

  o *PATH/IES Program (10/2019 to present).*
  Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.

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

- **Maryland Health Benefit Exchange** – *IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).*
  As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES

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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.

b, BerryDunn

Marvin (Ed) Crawford

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

Overview

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

Experience

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

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

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

West Virginia BMS (06/2010 to 04/2019). As the HIPAA security officer, Ed provided management and operational support services to the State Medicaid Agency which included, but was not limited to, Information Technology security controls, system performance monitoring, project management, report administration and stakeholder engagement. Areas of focus included research, analysis and management of comprehensive IT security policies and

procedures for the Medicaid Enterprise (MMIS, DW/DSS and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

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

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

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

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

b BerryDunn

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 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.

- *MCO 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 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.

b, BerryDunn

Cynthia Taylor, LPN, CHP, CHS

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

Overview

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

Experience

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

- **West Virginia BMS**

    o *Medicaid EDS Procurement Assistance, Implementation, and the Centers for Medicare and Medicaid Services (CMS) Certification Project (09/2018 to present)* As business analyst/SMEs, Cynthia assists BMS with management of the scope of EDS requirements throughout the requirements' DDI, testing, and training. Previously supported the Data Visioning & Warehouse RFP and Concept of Operations (ConOps) Development for the Procurement Assistance Project.

    o *MITA SS-A (08/2012 to present)* Cynthia serves as MITA Subject Matter Expert/Analyst for West Virginia's MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects.

    o *WV Children's Health Insurance Program (WVCHIP) (09/2020 to 03/2021):* Cynthia served as a business analyst, assisting WVCHIP with transitioning from FFS delivery to managed care model. She assisted in the operational and system readiness reviews and the development of the Operational and Monitoring Plan.

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o *ICD-10 Implementation (03/2013 to 04/2016):* Cynthia worked on the ICD-10 Implementation Project and provided support to the Project Manager as a SME on healthcare policy. She assisted in the remediation of the BMS Provider Policy Manual for ICD-10 implementation, facilitated Policy Workgroup Sessions with program areas, and assisted in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.

o *Adult Quality Measures Grant Project (03/2013 to 10/2016)*
Cynthia supported the collection and reporting of the Adult Core Quality Measures and the implementation of the BMS Quality Unit. She assisted with the development of training materials; coordinated training workshops, provided training to staff and to providers; served as a resource for providers, stakeholders, and partners requesting assistance; provided expertise in the development of trainings that focused on educating providers in collecting and reporting on the Adult Core Measures, as well as in development of staff training that included the use of tools for collecting and analyzing the data from claims, surveys, medical records, and encounter records; and worked with the Data Manager and Data Analyst to ensure best practices related to data collection and analysis.

o *ACA Project (12/2012 to 08/2013):* Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.

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

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

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

b, **BerryDunn**

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

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

- *HIPAA Privacy Implementation (07/2002 to 06/2004):* Cynthia worked with the Agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing Agency Notice of Privacy Practices; developing Agency privacy policies, procedures, and forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

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

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

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

b, BerryDunn

Dorothy Ball, BA

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

Overview

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

b, **BerryDunn**

Experience

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

- **BerryDunn (06/2009 to present)**

    o **West Virginia DHHR**

        ▪ *Electronic Data System (EDS) Project (09/2018 to present)*
        Dot serves as Business Analyst/SME currently serving as the Project Training Lead and supporting the Testing and Certification teams. She previously supported the Data Visioning & Warehouse RFP and Concept of Operations (ConOps) Development, and the Certification team for the Procurement Assistance Project.

        ▪ *West Virginia Medicaid Enterprise IES Project (09/2018 to present)*
        Dot serves as Business Analyst/SME supporting the Deliverables Review team for the West Virginia Project Management Services

        ▪ *MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 to present)*
        Dot serves as MITA Subject Matter Expert/Analyst.

        ▪ *ACA Compliance and Implementation Project (05/2010 to 12/2013)*
        Dot served as Lead Policy Analyst

        ▪ *State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 to 10/2010)*
        Dot served as Business Analyst

    o **Puerto Rico Medicaid Program** – *Puerto Rico MMIS Enterprise Objective Monitoring and Control Services (08/2020 to 09/2021)*
    Dot served as MITA Subject Matter Expert/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise KPI Set/Guide.

    o **West Virginia BMS** – *Medicaid Enterprise GAPMS Project (11/2016 to 03/2018)*
    Dot served as Policy Analyst and ACA SME.

    o **Arizona Health Care Cost Containment System (AHCCCS)** – *Testing Experience and Functional Tools in Community-Based Long-Term Services and Supports (TEFT) Grant PHR Assessment project (07/2014 to 09/2014)*
    Dot served as Business Analyst/SME

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

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

Consulting roles and projects include:

- Lead Analyst: New Mexico MMIS Replacement Project – Medical Assistance Division (MAD) MITA State Self-Assessment (SS-A) and Child Support Enforcement NHSIA assessment prepared for the State of New Mexico Human Services Department (HSD).

- Policy Manager: Arizona Health Insurance Exchange (HIX) IV&V

- MITA Subject Matter Expert/Business Analyst: AHCCCS MITA 2.0 and 3.0 SS-A.

- Policy Analyst: Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application.

- Lead Policy Analyst: West Virginia BMS ACA Compliance and Implementation Project.

- Lead Policy Analyst: Alabama Medicaid Managed Care EQR project.

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

- Business Analyst for the AHCCCS MITA Analysis Project. Performs business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, develops As-Is and To Be Assessments, data collection surveys, documentation review, plans and facilitates validation sessions, performs quantitative and qualitative gap analysis and documentation, develops solutions transition and sequencing plan MITA strategic Roadmap.

- Lead Business Analyst for AHCCCS FFS Management Division (FSM) MITA Assessment managed MITA business analysis team.

- Lead Business Analyst for AHCCCS and Department of Economic Security (DES) to initiate Phase I of the State of Arizona Technology Interface Project System (TIPS).

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- Lead Business Analyst managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third Party Administrator Transition and System Implementation project managed requirements development team.

- Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS), member of HIPAA privacy policy compliance team assessments.

- Lead Business Analyst Indiana MITA Analysis project. Performs business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, develops As-Is and To Be Assessments, web enable documentation request surveys using Survey Monkey, plans and facilitates validation sessions, and documentation review, develops solutions transition and sequencing plan MITA strategic Roadmap.

- Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development, and Implementation project.

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

- Business Analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework. This was among the first MITA assessments performed.

- Policy Analyst providing support to the Centers for Medicare and Medicaid Services (CMS) MITA Initiative Team. Provides policy guidance for the development of MITA Business Model and MITA Assessment tools. Participates in MITA framework development workgroups and MITA MMIS reshaping efforts including HL7 Financial Management workgroup. Familiar with most aspects of the framework and technical specifications.

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

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

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

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

- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues,

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managed care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues

- Analyzing and interpreting state and federal laws and regulations

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

- Developing data collection tools and survey instruments

- Conducting comparative health data analysis

- Responding to legislative requests and mandates

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

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

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

b, BerryDunn

Curtis Boyd, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Bachelor of Arts in Political Science, Southern University Master of Public Administration, Southern University Certified Project Management Professional® (in progress)

Overview

Curtis is a senior consultant with the BerryDunn Government Consulting Group, Medicaid Practice Area. He has 25 years of experience managing large enterprise systems and implementations for MMISs, commercial health plan systems, procurements, and data warehousing. Curtis has experience with MITA efforts as well as IV&V. He has led data modeling, data analytics, and process-mapping initiatives. Curtis also has experience designing and re-engineering processes, workflows, and technology solutions for healthcare systems.

Experience

BerryDunn (02/2021 to present). Curtis works as a senior consultant and project manager, responsible for delivering frequent, clear, and consistent communication to the client, team members, vendors, and direct reports He participates in marketing and business development activities, including writing blog posts, attending conferences, participating in industry groups, leading/participating in prospective client business development meetings, writing and reviewing RFPs and assisting with go/no-go decision-making, and developing responses to RFPs in collaboration with BerryDunn's New Business Development team. Additional responsibilities include project management and Medicaid subject matter expertise supporting small- and large-scale Medicaid projects.

North Carolina DHHS (08/2016 to 02/2021). Curtis worked as portfolio manager/senior project manager for the North Carolina DHHS, IT division, Medicaid MMIS Replacement project. He was responsible for the planning, oversight, and management leadership for the State's modular implementation. Curtis was also responsible for developing APDs, RFPs and other required documents for CMS and State consumption.

HTMS (02/2021 to present). Curtis worked on the Medicaid Practice project as a senior consultant. Curtis held various roles to support business development and procurement. He had project management responsibilities for Medicaid and private health organizations, serving in the following roles:

- South Dakota Medicaid, South Dakota – MMIS Project Director

b, BerryDunn

- Senior Whole Health, Massachusetts – Senior Medicaid Health Consultant

- Change Healthcare Corporate Office, Missouri – Project Management Lead

- Geisinger Health, Pennsylvania – Senior Medicaid Health Consultant and Project Manager

- Valance Health, Illinois – Senior Medicaid Health Consultant

- Cenpatico Health, Arizona – Senior Medicaid Health Consultant

Hubert Systems (05/2010 to 02/2011). Curtis worked as an SME to support the State's MITA Assessment, including developing business and technical requirements. He also provided recommendations for program and process improvement.

CNSI (06/2008 to 05/2010). Curtis served as a SME and team lead for the Program Integrity Management and Data Warehouse/Analytics business areas for the South Dakota Department of Social Services. He provided MITA methodology expertise to support DDI to align the MITA business processes for the State's program integrity business area. Curtis also provided front-end and middle tier support to generate standardized queries, on-demand queries, and reports for Audit Studio He had oversight of business analyst and program staff to generate, establish, review, and monitor case activity related to fraud and abuse, grievances, appeals, and sanctions for the Case Management Sub-System. In addition, Curtis managed the implementation of predictive modeling, risk analysis, and episode grouping analysis to identify patterns of utilization, risk, predictions, treatment patterns, and provider profiling to improve the delivery of services.

Louisiana Department of Health and Hospitals (04/2000 to 05/2008). Curtis worked as an assistant section chief/program manager for the MMIS, Curtis was responsible for providing oversight of the MMIS fiscal intermediary contract and acted as principal assistant to the MMIS section chief which oversaw five key areas for a certified MMIS. He managed the fiscal intermediary and Medicaid Administrative Reporting Systems (MARS) staff in the preparation of annual mandated federal reports (i.e., Medicaid Statistical Information System (MSIS) 2082); conducted the State's MITA Assessment; and managed data warehouse and data quality controls to help ensure the integrity of information. In addition, Curtis worked closely with the CMS Regional Office on MITA, MSIS, and other federal reporting.

b, **BerryDunn**

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).*

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- *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

b, BerryDunn

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.

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

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

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

b, **BerryDunn**

Shelly Schram, CAPM®

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

Overview

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

Experience

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

- *EPMO (01/2019 to 10/2021).*
  Shelly supports the WV EPMO project with business analysis, project coordination, and management tasks. She worked with the State to maximize productivity and developed State-approved templates used across the engagement. Shelly also works as an SME for APD in development and updates to project narratives and timelines.

- *Third Party Liability Options Analysis and Procurement Assistance Project (04/2019 to 03/2022).*
  Shelly serves as the project SME for the TPL project. She focuses on business analysis, project coordination, and management tasks. As a SME, Shelly supports deliverable development, requirements definition, conducts research on federal and state guidance, and performs gap analysis between the RFP and State identified requirements.

- *PERM Project Phase II (11/2019 to present).* Shelly serves as a SME for the project. She focuses on identified error life cycles, tracking requests, data analysis, corrective actions, and Corrective Action Plans (CAPs).

- *West Virginia PATH (06/2020 to present).*
  Shelly supports the project activities related to the new West Virginia IES to consolidate and integrate DHHR program service systems into a single enterprise.

b, **BerryDunn**

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

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

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

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

- *Development Project Specialist (01/2016 to 08/2018).* In this role, Shelly developed, maintained, and monitored detailed project schedules, including timelines, workflow, budgets, personnel, and resources. She researched high-profile donors via online data sources for the executive director and SVP of Development, and coordinated events hosted by National Development. During this time, Shelly also began integration of the Blackbaud Luminate Online system. For this project, she coordinated and took lead on ensuring timely completion. In addition to integration, she began the process of building online campaigns with matching appeals.

- *Training and Evaluation Data Specialist (05/2013 to 01/2016).* Shelly managed data files to help ensure accuracy and security. She summarized the results of training and evaluation activities; organized and prepared high-quality reports, graphs, and charts of departmental activities; and constructed and maintained staff evaluation and program fidelity instruments.

- *Project Support Specialist (12/2011 to 05/2013).* Shelly assisted with the migration of three databases into one newly created CRM, assisting with accurately mapping data fields and migrating 7.3 million donor records. She researched foundations, organizations, and individuals using several online databases to compile into a constituent report.

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

b, **BerryDunn**

Matthew Oatten

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Communications, Michigan State University

Overview

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

Experience

BerryDunn (07/2022 to present).

- **West Virginia Department of Health and Human Resources (DHHR)**
  - *Enterprise Data Solution (EDS) Project (07/2022 to present).* Matthew serves the Enterprise Data Solution project providing business analysis and project coordination support.
  - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2022 to present).* Matthew serves the Medicaid Enterprise System Modernization Strategy and Procurement project providing business analysis and project coordination support.

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

Michigan State University (08/2018 to 01/2022). Matthew works as Assistant Cheer & Dance Coach to co-manage operations of a D1 athletic team of 80 co-ed athletes. He assesses athlete performance while providing training to develop skill sets in compliance with NCAA and MSU Athletic Department safety protocols. He facilitates travel sporting, marketing, and community events to engage athletes, donors, and fans nationwide.

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Michigan State University (03/2014 to 05/2017). Matthew served as Resident Assistant to mentor and support a floor of over 90 on-campus residents. He enforced high standards of safety protocol, policy, and accountability while managing interpersonal relationships. He created, facilitated, and assessed programs to support residents' growth and development both academically and socially.

Sarah Vintorini

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

Overview

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

Experience

BerryDunn (11/2019 to present).

- **West Virginia BMS.**

  o *MES (3/2021 to present).*

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

  o *EDS (12/2021 to present).*

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

  o *EVV (11/2019 to present).*
    Sarah provides project coordination, deliverable review and creation, and monitors project risks and issues. Sarah helped BMS with the release of their EVV RFP, coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of West Virginia's EVV solution.

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- o *Provider Management Support (PMS) (11/2019 to present).*
  Sarah provides project coordination, deliverable development and review, and monitors risks and issues related to all sub-projects within PMS. Sarah is involved in the facilitation of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse. She assisted in developing a comprehensive outreach plan to educate and engage direct care workers and enroll each worker in the State's MMIS.

- o *Mental Health (MH) Parity Compliance Report (04/2020 to 08/2020).*
  Sarah provided project coordination, monitored project risks and issues, and assisted with deliverable development of West Virginia's MH Parity Compliance Report. She coordinated meetings with MCOs, and helped to gather documentation for accuracy related to FFS and pharmacy claims.

- o *MHP Implementation Project Management Support (01/2020 to 06/2020).*
  Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.

- **Alaska Division of Health Care Services (HCS)** – *MMIS Solicitation Consultant Services (09/2020 to present).*
  Sarah helped develop and distribute a fact-finding survey to gain input from stakeholders and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Sarah assists with the development of deliverables, project presentations, and monitors project action items.

- **West Virginia Department of Health & Human Services (DHHR)** – *PATH DDI Project Management (12/2019 to present).*
  Sarah provides project coordination, tracks action items, and monitors project risks and issues. Sarah assisted the cross-functional team including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.

West Virginia Governor's Highway Safety Program (2013 to present). Sarah currently serves as a corporate event planner for the West Virginia Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities have included securing over $150,000 annual sponsorships, a tradeshow of over 30 vendors from across the country, securing nationally acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event. Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She has utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

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

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

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

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Cate Poling

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

Overview

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

Experience

BerryDunn (06/2021 to present).

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

Mountain State Eye Associates (04/2017 to 06/2021). Caitlin was a Certified Ophthalmic Assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide minor in-office surgical procedures, and prepare patients for cataract surgery. She performed extensive, thorough patient histories. This position involved heavy documentation/notetaking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure and administering ophthalmic medications to patients.

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient

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

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

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

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

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

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

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

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

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

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

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

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

b, **BerryDunn**

Kourtney Kirk

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	5.5 years
Certifications and Education:	Bachelor of Science in Business Administration, Glenville State College

Overview

Kourtney is an experienced coordinator with a history of working in data analysis, graphic design and advertising, event planning, and communication and sales. She has strong leadership skills, the ability to work under pressure and deadlines, and confidence in speaking, working on a team, and understanding new concepts.

Experience

BerryDunn (10/17/2022 to present). Kourtney will serve as a Project Coordinator on the following projects.

West Virginia BMS – Medicaid Enterprise Modernization Strategy and Procurement Project (10/2022 to present).

TEK Systems (08/2020 to 10/2022)

- **BerryDunn** (03/2021 to 01/2022)

- **West Virginia DHHR** – (03/2021 to 01/2022).

  o Kourtney created agendas and maintained meeting schedules for the DHHR, IBM® Watson Health, and BerryDunn. She maintained project information for multiple projects and tracked action items, decisions made, and meeting minutes. She assisted in the creation of client deliverables for various projects, created monthly status reports and obtained updated information from team members, and scheduled meetings. Kourtney also created agendas for engagement-level meetings and distributed them to meeting invitees in advance, trained with Confluence and Jira® products, took meeting minutes for all client-based and internal meetings, and submitted meeting notes for review to the editing team and updated any corrects before distributing to team and client

N3 (03/2018 to 11/2018; 08/2019 to 08/2020)

Business Development Representative and Scheduling Coordinator (08/2019 to 08/2020).

- Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign

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to support Microsoft Account Executives (AE) and clients, schedule meetings between clients and Microsoft AEs to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

Business Development Representative (03/2018 to 11/2018).

- Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and also managed client relationships

Total Quality Logistics (11/2018 to 08/2019). Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pickup and delivery of shipments. She communicated proactively customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glenville State College (08/2017 to 12/2017). Kourtney served as the student intern, responsible for filing any donations made to the college. She used Razor's Edge and BlackBaud technology systems, communicated directly with GSC Alumni to request donations to the Glenville State College Foundation, and prepared presentations and marketing advertisements for the Foundation. She served as executive assistant to Call Stars program and assisted in the hiring process, entered contact information into contact management systems, and maintained tracking reports of public relations activity. Kourtney also performed analysis of donations made by Alumni and businesses and represented the goodwill of Glenville State College.

b BerryDunn

Azba Hotelwala

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	5.5 years
Certifications and Education:	Bachelor of Science in Business Administration, Glenville State College

Overview

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

Experience

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

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

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

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

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

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

b BerryDunn

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 10 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

Experience

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

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

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

- *Senior Editor (6/2020 to 8/2021)*
  As senior editor, Alycia wrote copy for various mediums, including websites, social media, landing pages, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and RFPs; 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 RFPs; 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.

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Caitlin Cabral

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

Overview

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

Experience

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

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

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

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

University of Hartford's Department of Communication (09/2018 to 05/2020). Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing

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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.

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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 toward Bachelor of Science 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.

Experience

BerryDunn (10/2014 to present). Carole Ann serves as a project coordinator 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

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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 DHHR** – *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).*
  Carole Ann served as an analyst for West Virginia 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.

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Emily Hendrickson

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

Overview

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

Experience

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

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

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

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

Civil Consultants (09/1999 to 07/2014). As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing, and proofreading proposals, project submittals, and correspondence to clients and governmental agencies; printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

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

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

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Janine DiLorenzo

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

Overview

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

Experience

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

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

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

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

- *AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 to 08/2013)*

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

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Jonathan Williams

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

Overview

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

Experience

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

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

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

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

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

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Jordan Ramsey

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

Overview

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

Experience

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

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

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

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

Southeast Missouri State University (2015 to 2017). As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book

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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.

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Megan Hamilton

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

Overview

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

Experience

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

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

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

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

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

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

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

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Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

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

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Deliverable #	Deliverable Name	Deliverable Description
		and implement ways to improve relationships with vendors.
10	APD(s)	An IAPD-U will be developed prior to the close of the FFY and will contain information necessary for DHHR to request continued federal buy-in and financial backing. BerryDunn will also assist DHHR in the development of the IAPD-U; however, the State will maintain responsibility for submission of the document.
11 (Phase I and Phase II Project Deliverable)	UAT Plan Updates (As Needed)	The UAT Plan was developed in Phase I of the EDS Project. The UAT Plan documents the State's approach to UAT of the EDS, including the approach to tracking UAT outcomes, issues, and defects. Updates to the UAT Plan will be developed during Phase III as needed.
12	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Central Master Agreement
CMS	Centers for Medicare & Medicaid Services
DAF	Deliverable Acceptance Form
DDI	Design, Development, Implementation
DGC	Data Governance Committee
DHHR	Department of Health and Human Resources
DW/DSS	Data Warehouse/Decision Support System
EDS	Enterprise Data Solution
FFP	Federal Financial Participation
FFY	Federal Fiscal Year
IAPD-U	Implementation Advance Planning Document Update
KPI	Key Performance Indicator
MITA	Medicaid Information Technology Architecture
MOU	Memorandum of Understanding
NPI	National Provider Index
ORT	Operational Readiness Testing
PM	Project Management
PMBOK®	Project Management Book of Knowledge®
PMI®	Project Management Institute®
PMO	Project Management Office
PMP®	Project Management Professional®
QA	Quality Assurance
RFP	Request for Proposals
RTM	Requirements Traceability Matrix
SIT	System Integration Testing

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Acronym/Abbreviation	Definition
SLA	Service Level Agreement
SME	Subject Matter Expert
SMC	Streamlined Modular Certification
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
UAT	User Acceptance Testing
USVI	United States Virgin Islands

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

FROM: Lucinda Carroll
             Procurement Specialist, BMS Procurement Services

DATE: May 4, 2023

RE: PF1224245, CDO BMS23*34

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

The purpose of this delivery order is for the Medicaid Enterprise Data Solution Implementation and the Centers for Medicare & Medicaid Services Certification Project Phase IV (EDS Project Phase IV) and will allow vendor to continue PM support for nine months after the updated go-live date of March 31, 2023. In addition, this project's scope includes services to support formal CMS certification and federal reviews. The total cost is not to exceed $1,660,160.00. The service period will be 06/01/2023 – 12/31/2023.

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

Robert Price
Agree

TO: DHHR Finance

FROM: Lucinda Carroll
          Procurement Specialist, BMS Procurement Services

DATE: May 4, 2023

RE: PF1224245, CDO BMS23*34 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 06/01/23 through 12/31/23 and we anticipate all payments to be made in SFY24.

Total: $1,660,160.00

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.