



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

# State of West Virginia Delivery Order

Order Date: 01-23-2024

CORRECT ORDER NUMBER MUST APPEAR ON ALL PACKAGES, INVOICES, AND SHIPPING PAPERS. QUESTIONS CONCERNING THIS ORDER SHOULD BE DIRECTED TO THE DEPARTMENT CONTACT.

<b>Order Number:</b>	CDO 0511 2680 BMS2400000023 1	<b>Procurement Folder:</b>	1363932
<b>Document Name:</b>	Medicaid & Children's Health Insurance Program (MCES)	<b>Reason for Modification:</b>	
<b>Document Description:</b>	Medicaid & Children's Health Insurance Program (MCES)		
<b>Procurement Type:</b>	Central Delivery Order		
<b>Buyer Name:</b>	Crystal G Hustead		
<b>Telephone:</b>	(304) 558-2402		
<b>Email:</b>	crystal.g.hustead@wv.gov		
<b>Shipping Method:</b>	Best Way	<b>Master Agreement Number:</b>	CMA 0511 HHR2100000003 1
<b>Free on Board:</b>	FOB Dest, Freight Prepaid		

VENDOR		DEPARTMENT CONTACT		
<b>Vendor Customer Code:</b>	000000100150	<b>Requestor Name:</b>	Lakendra R Burdette	
BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST  PORTLAND ME 04102 US		<b>Requestor Phone:</b>	304-352-4319	
<b>Vendor Contact Phone:</b>	6813138905	<b>Requestor Email:</b>	lakendra.burdette@wv.gov	
<b>Discount Details:</b>		<div style="font-size: 48px; font-weight: bold;">24</div> <div style="font-weight: bold;">FILE LOCATION _____</div>		
Discount Allowed	Discount Percentage			Discount Days
#1 No	0.0000			0
#2 No				
#3 No				
#4 No				

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

<b>Total Order Amount:</b>	\$1,164,740.00
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Purchasing Division's File Copy

CH 2/12/24  
 PURCHASING DIVISION AUTHORIZATION  
 DATE: *[Signature]* 2/12/2024  
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION  
 DATE: *[Signature]* 2-12-24  
 ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Medicaid & Children's Health Insurance Program (CHIP) Enterprise System (MCES) Procurement Assistance Project

Dates of Service 02/14/2024 - 06/14/2024

Total: \$1,164,740.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$12,900.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-02-14	2024-06-14				

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

**Extended Description:**

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 60 Hours @ \$215 = \$12,900.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$16,200.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-02-14	2024-06-14				

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

**Extended Description:**

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 60 hours @ \$270 = \$16,200.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$73,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-02-14	2024-06-14				

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

**Extended Description:**

Lead MMIS Project Manager: Base Year One

Hourly Rate: \$205.00

Emily McCoy 360 hours @ \$205 = \$73,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$138,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-02-14	2024-06-14				

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

**Extended Description:**

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Sue Prior 25 hours @ \$80 = \$2,000  
 Matt Oatten 425 hours @ \$80 = \$34,000  
 AJ Mong 355 hours @ \$80 = \$28,400  
 Jon Watkins 500 hours @ \$80 = \$40,000  
 Cate Poling 60 hours @ \$80 = \$4,800  
 Emily Tan 135 hours @ \$80 = \$10,800  
 Hailey Holden 60 hours @ \$80 = \$4,800  
 Alycia Minshall, Caitlin Cabral, Emily Hendrickson, Janine DiLorenzo, Jonathan Williams, Jordan Ramsey, Megan Hamilton,  
 Carole Ann Guay, KD Dobyne 175 hours @ \$80 = \$14,000.00

Total: 1,735 hours @ \$80 = \$138,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$923,040.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-02-14	2024-06-14				

**Commodity Line Description:** General Project Manager: Base Year Three

**Extended Description:**

General Project Manager: Base Year One

Hourly Rate: \$180.00

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

Peter Alfrey 285 hours @ \$180 = \$51,300  
 Nicole Spears 685 hours @ \$180 = \$123,300  
 Mary Stewart 591 hours @ \$180 = \$106,380  
 Meghann Slaven 50 hours @ \$180 = \$9,000  
 Marnie Hudson 250 hours @ \$180 = \$45,000  
 MaryLou Banker 465 hours @ \$180 = \$83,700  
 Kortney Ester 250 hours @ \$180 = \$45,000  
 Ebony Carter 200 hours @ \$180 = \$36,000  
 Alison Barnet 375 hours @ \$180 = \$67,500  
 Rick Hayward 250 hours @ \$180 = \$45,000  
 Dorothy Ball 35 hours @ \$180 = \$6,300  
 Cynthia Taylor 70 hours @ \$180 = \$12,600  
 Susan Chugha 46 hours @ \$180 = \$8,280  
 Zach Rioux 20 hours @ \$180 = \$3,600  
 Shea Berry-Brennan 20 hours @ \$180 = \$3,600  
 Brandon Milton 20 hours @ \$180 = \$3,600  
 Liz Vose 160 hours @ \$180 = \$28,800  
 Brody McClellan 50 hours @ \$180 = \$9,000  
 Tonya Roloson 40 hours @ \$180 = \$7,200  
 Julie DuPuis 40 hours @ \$180 = \$7,200  
 Jeff Stoddard 290 hours @ \$180 = \$52,200  
 Jim Strassenburgh 250 hours @ \$180 = \$45,000  
 Ryan Wrisley 95 hours @ \$180 = \$17,100  
 Miles Isacke 275 hours @ \$180 = \$49,500  
 Lars Loren 50 hours @ \$180 = \$9,000  
 Fei Zou 30 hours @ \$180 = \$5,400  
 Marvin (Ed) Crawford 50 hours @ \$180 = \$9,000  
 Adam Bowman 125 hours @ \$180 = \$22,500  
 Dawn Webb 26 hours @ \$180 = \$4,680  
 Jason Hagrove 10 hours @ \$180 = \$1,800  
 Christa Bernacchia 25 hours @ \$180 = \$4,500

Total: 5,128 hours @ \$180 = \$923,040.00



January 17, 2024

To Whom It May Concern:

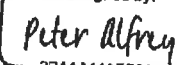
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Medicaid & Children's Health Insurance Program (CHIP) Enterprise System (MCES) Procurement Assistance Project under our master contract (CMA # HHR21\*03). As stated in the SOW document, the duration of this work is estimated to be 4 months. BerryDunn agrees to a SOW start date effective February 14, 2024.

Assuming a start date of February 14, 2024, the work would then conclude on June 14, 2024.

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:  
  
2DA4AA4ADBB3A477...

Peter Alfrey  
Principal  
207-541-2242

OK  




## 1.0 Introduction

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) and Bureau for Medical Services (BMS) with the planning activities for procuring modules for the Medicaid & Children's Health Insurance Program (CHIP) Enterprise System (MCES). This SOW is henceforth referred to as the MCES Procurement Assistance Project SOW. This work will be completed in accordance with the terms and conditions of the Central Master Agreement (CMA) #HHR21\*03 BMS Project Management Services contract between BerryDunn and DOHS.

### 1.1 Key Information

- This document intends to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the MCES Procurement Assistance.
- The objective of this project is to plan and estimate implementation costs for the modernized MCES, which will aim to:
  - Explore strengthening MCES partnerships with other states and territories (such as the United States Virgin Islands [USVI]) and leverage the 2021 outcomes-based planning (OBP) pilot for the modernized MCES with the Centers for Medicare & Medicaid Services (CMS)
  - Create Implementation Advance Planning Documents (IAPDs) to be submitted to CMS to help fund the implementation costs for the modernized MCES.
  - Coordinate joint requirements planning (JRP) sessions to confirm specifications and requirements for the modernized MCES and to inform the development of draft Request(s) for Proposals (RFP) and request for quotations (RFQ)
  - Develop draft RFP(s)/RFQ(s) to solicit competitive proposals to meet solution specifications and requirements according to technical and cost-evaluation criteria.
  - Plan organizational transformation through integration of the MCES Procurement Assistance project with current and future organization development (OD) projects.
  - Support DOHS OD and the Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) by implementing a modular procurement strategy to procure, design, and implement MCES modules, updating portfolio management office structure, and providing data integration technology advisory services.



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- The BerryDunn leadership team will consist of Peter Alfrey as the MCES portfolio manager and Nicole Spears as the project lead.
  - This work will begin upon approval of this SOW and a mutually-agreed-upon date. This work is scheduled to span four months.



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>team</p> <ul style="list-style-type: none"> <li>Managing project logs (action items, decisions, issues, and risk tracking)</li> <li>Storing project documentation repository in an agreed-upon SharePoint location</li> <li>Maintain the previously prepared Implementation Timeline including the plan and modular implementation approach for the modernized MCES</li> </ul> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>Deliverable 2: Monthly Status Report</li> </ul> <p><i>Completion Criteria</i></p> <ul style="list-style-type: none"> <li>Project Execution and Control will be completed upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DOHS project sponsor or their designee.</li> </ul>	<p>Adam Bowman Jon Watkins MaryLou Banker Marnie Hudson Dorothy Ball Cynthia Taylor Matt Oatten AJ Mong Sue Prior Christa Bernacchia Hailey Holden Jordan Ramsey Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Alycia Minshall Carole Ann Guay KD Dobyne Megan Hamilton</p>	
	<p><b>Procurement Advisory Services</b></p> <p><i>Service Approach</i></p> <p>Utilizing the previously prepared Strategic Plan for MCES modernization, BerryDunn will provide procurement advisory services to support the activities surrounding the procurement(s) of MCES Modules.</p> <p>During the pre-procurement phase:</p> <ul style="list-style-type: none"> <li>BerryDunn will prepare for the JRP sessions by researching requirements specific to the proposed modules to confirm specifications and requirements for the modernized MCES and to inform the development of the draft RFPs/RFQs.</li> <li>Under the guidance of BMS, BerryDunn will engage the USVI in procurement planning activities such as: soliciting requirements to fit the needs of the USVI; providing requirements for review and approval; inclusion in JRP sessions and procurement development; and incorporating USVI feedback into the procurement.</li> </ul>	<p>Peter Alfrey Nicole Spears Meghann Slaven Emily McCoy Ryan Wrisley Susan Chugha Shea Berry-Brennan Brandon Milton Zach Rioux Jim Strassenburgh Jeff Stoddard Mary Stewart Julie DuPuis Kortney Ester Rick Hayward Alison Barnett Ebony Carter</p>	<p>3,436</p>



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	acceptance of the Deliverable Acceptance Forms (DAFs) by the DOHS project sponsor or their designee.		
4.0	<p><b>IAPD Development</b></p> <p><i>Service Approach</i></p> <p>To support the implementation cost and requirements of the modular MCES, BerryDunn will develop and assist in facilitating the approval of IAPDs for each module to help ensure that the project maintains buy-in and financial backing from relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> <li>Deliverable 6: IAPDs</li> </ul> <p><i>Completion Criteria</i></p> <p>The IAPD Development phase of the project will be completed upon signature approval of the Project Closeout Summary.</p>	Nicole Spears Mary Stewart MaryLou Banker Marnie Hudson Dawn Webb Jason Hargrove Jon Watkins Jordan Ramsey Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Alycia Minshall Carole Ann Guay KD Dobyne Megan Hamilton	217
5.0	<p><b>Purchasing Contract Management Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide the Agency with ongoing ad-hoc procurement research, analyses, and assistance upon request. BerryDunn will also continue refinement of procurement submission checklists, documenting Purchasing's role in contract compliance, and maintaining an inventory and proposed timeline of future procurements to support an overall proactive procurement timeline and strategy.</p> <p><i>Completion Criteria</i></p> <p>The Purchasing Contract Management Support phase of the project will be complete upon signature approval of the Project Closeout Summary.</p>	Peter Alfrey Nicole Spears Mary Stewart Liz Vose Brody McClellan Tonya Roloson Matt Oatten Jon Watkins AJ Mong Jordan Ramsey Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Alycia Minshall Carole Ann Guay KD Dobyne Megan Hamilton	800





### 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 Year 3 in CMA #HHR21\*03.

**Table 2: Project Resources**

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$ 270.00	Nicole Becnel	60	\$16,200.00
1	LPM	\$ 215.00	Eduardo Daranyi	60	\$12,900.00
3	LMPM	\$ 205.00	Emily McCoy	360	\$73,800.00
7	GPM	\$ 180.00	Peter Alfrey	285	\$51,300.00
7	GPM	\$ 180.00	Nicole Spears	685	\$123,300.00
7	GPM	\$ 180.00	Mary Stewart	591	\$106,380.00
7	GPM	\$ 180.00	Meghann Slaven	50	\$9,000.00
7	GPM	\$ 180.00	Marnie Hudson	250	\$45,000.00
7	GPM	\$ 180.00	MaryLou Banker	465	\$83,700.00
7	GPM	\$ 180.00	Kortney Ester	250	\$45,000.00
7	GPM	\$ 180.00	Ebony Carter	200	\$36,000.00
7	GPM	\$ 180.00	Alison Barnett	375	\$67,500.00
7	GPM	\$ 180.00	Rick Hayward	250	\$45,000.00
7	GPM	\$ 180.00	Dorothy Ball	35	\$6,300.00
7	GPM	\$ 180.00	Cynthia Taylor	70	\$12,600.00
7	GPM	\$ 180.00	Susan Chugha	46	\$8,280.00
7	GPM	\$ 180.00	Zach Rioux	20	\$3,600.00
7	GPM	\$ 180.00	Shea Berry-Brennan	20	\$3,600.00
7	GPM	\$ 180.00	Brandon Milton	20	\$3,600.00
7	GPM	\$ 180.00	Liz Vose	160	\$28,800.00
7	GPM	\$ 180.00	Brody McClellan	50	\$9,000.00
7	GPM	\$ 180.00	Tonya Roloson	40	\$7,200.00
7	GPM	\$ 180.00	Julie DuPuis	40	\$7,200.00



- LMPM = Lead MMIS Project Manager
- GPM = General Project Manager
- SS = Support Staff



## 4.0 Project Hours and Costs per Month

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

**Table 3: Project Costs by Month**

Month #	EM	LPM	LMPM	GPM	SS	Estimated Hours Per Month	Estimated Cost Per Month
	Hours	Hours	Hours	Hours	Hours		
Month 1	25	25	120	1,923	670	2,763	\$436,465
Month 2	10	10	80	1098	400	1,598	\$250,890
Month 3	10	10	80	1048	340	1,488	\$237,090
Month 4	15	15	80	1059	325	1,494	\$240,295
<b>Total</b>	<b>60</b>	<b>60</b>	<b>360</b>	<b>5,128</b>	<b>1,735</b>	<b>7,343</b>	<b>\$1,164,740</b>



**BerryDunn Authorized Signature**

As a principal of this firm in our Consulting Team 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 DOHS 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:

*Peter Alfrey*

Signature

1/17/2024

Date

**DOHS Approval of Approach, Staffing, and Not-to-Exceed Cost**

*Brendan Lewis*

Signature

1-22-24

Date



## Appendix A: Resumes

### Nicole Becnel, PMP®

<b>Proposed Project Role:</b>	Engagement Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Arts in Speech and Hearing Science, University of South Florida Certified Project Management Professional® (PMP®) Executive Coaching Certification®

#### Overview

Nicole brings valuable expertise to 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 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**
  - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to present)*  
Nicole is the lead project manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementing a fully compliant 837 encounter data process with the State's fiscal agent and 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



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

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

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

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

Nicole was the lead project manager overseeing the State's transition of the WVCHIP program from fee-for-service to managed care, to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site system 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 Operational Readiness Review 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 prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

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

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



reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the State.

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



- *Medicaid Eligibility and Enrollment RFP Development and Procurement Assistance (10/2015 to 12/2017)*
- *ICD-10 Readiness Assessment, Implementation, and Migration (09/2013 to 03/2016)*
- *MITA SS-A Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- *MMIS DDI and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014)*
- *Provider Enrollment (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)**  
As engagement manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing, and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as project manager and SME for the Maine Department of Health and Human Services (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 budgets, time, and quality specifications to help 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;



## Eduardo Daranyi, MEd, PMP®

<b>Proposed Project Role:</b>	Lead Project Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Science in Physics, Mathematics, and Business Administration, Hillsdale College Master of Education, Lesley College Certified PMP® 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 lead project manager, Ed provides oversight of BerryDunn's contract with BMS to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid DW/DSS implementation; SUD 1115 Waiver development and implementation; Affordable Care Act (ACA) analysis and advisory services; ICD-10 compliance; E&E systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; CHIP implementation and stabilization; access to care planning and monitoring; provider re-enrollment; asset verification system procurement; and other related initiatives. Since Ed joined the West Virginia project on a full-time basis in 2012, he has held many roles, including engagement manager, lead project manager, and general project manager. In 2012, Ed took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.





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, the State has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

Ed has been the engagement manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and roadmap 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. OD for the project will take the findings of the MITA SS-A and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present)*

Over the past eight years that 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 DW/DSS, develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DHHR databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DHHR in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DHHR.
- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*

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



10/2017 to 04/2019)

- *TPL Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *IAP Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *TEPMS Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *IMM Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home APD Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Healthcare Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*



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 Goold Health Systems, 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](http://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.



“unwind” and get the policies and eligibility processes back to a pre-COVID state, once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 to 10/2021).*  
Emily currently serves as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DHHR align and manage its projects across the enterprise. Emily’s State government employment experience, coupled with her knowledge of project and portfolio management, provides a valuable perspective and ability to help the State obtain its desired outcomes.
- *Eligibility and Enrollment Implementation Assistance (01/2018 to present).*  
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily is able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
- *Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020).*  
Emily served as the project manager for the West Virginia DHHR EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DHHR that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018).**  
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA – Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 to 04/2017).**  
Emily was a key resource on BerryDunn’s team to provide Henrico with planning and



Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.

- *Office of Behavioral and Alternative Health Care (01/2003 to 12/2004)*  
Emily served as a Health & Human Resource Specialist in the State Medicaid Long-Term Care Program with overall duties involving the supervision and oversight of claims processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the Minimum Data Set (MDS), billing, and medical eligibility.

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

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



## Peter Alfrey, PMP®, Prosci® CCP, LSSGB

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

### 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 MES, MCO and data/analytics programs providing program oversight. EPMO projects and programs include:



Peter served as project manager for the AVS project that supported the State's objective of procuring AVS-related services for the State's Medicaid program. Under Peter's leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.

- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016)*

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and 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.

- **WVCHIP**

- *ORR (09/2020 to 01/2021)*
- *MCO Transition Planning Project Phases I and II (03/2019 to present)*. Peter provided 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.
- *OOP Maximum (05/2021 to present)*

- **West Virginia DHHR**

- *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.



*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: 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*





- *MES MSP Project (7/2021 to present)*  
As project manager, Nicole assists the client with development of a modernization strategic plan, procurement planning activities, and providing subject matter expertise on MES. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.
- *Managed Care EDQ Project (7/2021 to 2/2022).*  
Nicole worked as an SME assisting with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). For this project she developed a SDLC Coordination Plan to provide a process for reviewing and prioritizing BMS enterprise system updates.

**Gainwell Technologies (formerly DXC Technology) (12/2017 to 07/2021).** Nicole worked as a senior business advisor for the Member Management Module Team as Kansas developed a new modular MMIS. The Member Management Module includes Member Eligibility, Medicare Management, Eligibility Verification Systems, and Early and Periodic Screening, Diagnosis, and Treatment. Nicole also led the Business Analysts in the module and produced the end products User Interface design, role-based access security (RBAC), all system documentation for her sub-systems (Design Expectations Document, Detailed System Design, Business Design Documentation, etc.), led her subsystem through the Medicaid Enterprise Certification Toolkit (MECT), and provided subject matter expertise for testing and training.

**SR Advise (01/2016 to 12/2017).** Nicole worked as a director and account manager to provide creative, strategic and executive services to clients within the healthcare marketing space. She developed and implemented operational plans and strategies to meet clients' individual business objectives and focused on improving organizational performance through enhanced business processes and management strategy planning. Nicole spearheaded a new internship program as well as business growth in the public health arena. She also directed RFP response development, including coordination with both sub and prime vendors. Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company.

**SVC, Inc. (07/2012 to 12/2015).** Nicole worked as the director of business development and a senior health policy advisor as a systems and managed care SME. She managed high-profile, complex program and system implementations reporting to and advising senior leadership. Nicole assisted in the development of key Medicaid pilot programs, including ones developed to serve as ACA Medicaid expansion vehicles, by identifying potential operational and implementation impacts and proposing best practices. Nicole also identified areas of opportunity and recommended strategies for process improvement for clients' established programs through the consideration of potential impact(s) of policy and programmatic changes on operations, systems, and vendors. Nicole also led non-financial business operations and business



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and sales assistants and managing all customer sales. Nicole directed sales operations resulting in the two most profitable years in the state for the builder, achieving 300%+ higher profit over prior years.



Oversight and Support Bureau Chief to lead a \$5+ billion Managed Care and Dental Wellness Program with the mission to improve member health outcomes, improve program efficiency and ensure program sustainability. She supervised 12 direct hires primarily responsible for contract compliance oversight, remediation of compliance and performance issues, managed care oversight, actuarial rate setting, quality improvement, encounter data submission accuracy, and data analytics. Mary led strategic planning related to regulatory implementation, onboarding of new programs and services, alignment of best practices, and continuous program and process improvement. She also collaborated with internal and external entities on aspects tied to fiscal oversight, actuarial rate development, and information technology systems. Mary provided relevant feedback on modernization for the current MMIS system including collaboration with multiple stakeholders on the creation of user stories relevant to the Iowa Medicaid program.

**Centene Corporation, Iowa Total Care (12/2018 to 10/2019).** Mary served as a Claims Management Manager with a staff of 16 direct hires responsible for the day-to-day operations of accurate claims processing. She worked with Provider Relations Contracting Department to ensure contract requirements aligned with the claims system, assisted Operations Director with the encounter/eligibility file transfer process, and identified and implemented operational efficiencies, process improvements and developed policies and procedures. Mary also analyzed provider/member impacts and responded to complex escalated claims processing issues to ensure that provider/member expectations were met.

**Conifer Health Solutions (02/2018 to 12/2018).** Mary served as a Claims Denial Prevention Analyst to provide solutions to hospital departments on eliminating/reducing denials; analytics on all department denials; and coordinated resources to meet department specific needs.

**Kansas Department of Health & Environment (01/2002 to 02/2018).**

- *Data Analytics/Business Analyst Manager, Division of Health Care Finance (05/2014 to 02/2018).*

Mary managed a team of eight health care data analysts responsible for all reporting requirements. She managed and delivered all legislative and internal/external policy fiscal impacts. She defined data reporting needs for the implementation of the modernized eligibility system, collaborated with the Operations team on validation and accuracy of the HIPAA 837, 834 and 820 transaction files with the MCO, and utilized Agile-Waterfall Hybrid Methodology for the Modernization of the Kansas Medicaid Management System (KMMS) – Data Warehouse module. She led requirement verification sessions, gathered business requirements and wrote Business Requirement Documents for the Medicaid Modernization project. Mary also created, performed and audited all UAT for the implementation of the MMIS modernized Data Warehouse.

- *Fiscal Analyst/Business Analyst Manager, Division of Health Care Finance (10/2002 to 5/2014)*

Mary was responsible for requests and statistical measures of



**Meghann Slaven**

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	11 years
<b>Certifications and Education:</b>	Bachelor of Science in Journalism, Ohio University Bachelor of Fine Arts in Performance and 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 EDS 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**
  - *MES MSP Project (11/2021 to present)*  
As deputy project manager, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, and quality). West Virginia was selected by the Centers for Medicare & Medicaid



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)
  - *Puerto Rico MMIS (PRMMIS) Project (11/2020 to 12/2020)*  
As a 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 help ensure school performance according to milestone achievement; guided students through processes to help 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.



**Marnie Hudson**

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

**Overview**

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

**Experience**

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

- West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Implementation Assistance (02/2018 to present).**  
 As a Requirements Lead on the People’s Access to Help (PATH) project, Marnie is supporting the success of West Virginia’s Integrated Eligibility Solution (IES) project, which will consolidate and integrate DHHR program service systems into a single enterprise. She manages and tracks the PATH Requirements Traceability Matrix to help ensure each project release supports DHHR’s program business needs. She participates in configuration design sessions to help ensure the vendor is accurately understanding and capturing stakeholders’ business needs and supporting business rules. In addition, she reviews and provides input on project deliverables, and she assists with project activities associated with requirements, including the review and validation activities for the Document Inventory (forms, letters, notices) of all legacy systems. Marnie also provides monthly and periodic status reports for Requirements and Design, including the readiness of each project release.



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This included leading the design and development of Medicare Part D System changes using SDLC methodologies, serving as a SME in the Provider & Third-Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the Reference Subsystem.



requirements. MaryLou provides a weekly project status report to both BerryDunn and West Virginia stakeholders that addresses key project health items, such as progress of configuration and requirement design.

**Puerto Rico Medicaid Program (PRMP) – Puerto Rico Eligibility and Enrollment (PREE) Enterprise Objective Monitoring and Control (EOMC) Services (01/2020 to present).**

As a business analyst and project coordinator, Marylou reviews the evaluation criteria for the Outcomes-Based Certification (OBC) effort of the new Eligibility and Enrollment (E&E) system. She assisted in mapping the criterion to system requirements and test cases in preparation for preparing required system demonstrations as criterion evidence set forth by the Centers for Medicare & Medicaid Services (CMS). MaryLou is also developing a reusable checklist to help other states prepare for operational readiness reviews (ORR) and the final certification review (CR) based upon CMS regulations and guidelines as they apply to certification requirements for an E&E system.

To help promote project success, MaryLou created and organized a comprehensive project documentation repository to help maintain over 1,000 documents. In her role on this project, she also prepares and oversees the development of the monthly status report deliverable and participates in weekly project status meetings.

**West Virginia Bureau for Medical Services (BMS) – Mountain Health Trust (MHT) MCO Procurement Assistance Project (09/2019 to 9/2020).**

As a project coordinator and business analyst, MaryLou effectively summarized the client's needs and issues in meeting notes. MaryLou also contributed and brainstormed with the BerryDunn team regarding project research assignments.

**Massachusetts HIX/IES Entities – IV&V Services (03/2013 to 09/2019).**

The Massachusetts Health Insurance Exchange and Integrated Eligibility System (MA HIX/IES) project focused on enhancing HIX/IES to establish a fully integrated system for determining eligibility for a variety of state-funded health and human service programs, which included Medicaid and Qualified Health Care Programs (QHP). As an IV&V analyst and project coordinator, MaryLou provided critical supporting data for findings and recommendations in the IV&V Monthly Assessment report. She developed and maintained dashboards and report templates for tracking planned requirements vs. requirements delivered. In addition, she monitored and reported on risks and issues, including analysis of the stability of the HIX/IES production system, review and tracking of planned system integrator contractual system requirements vs actual requirements delivered, and analysis of active workarounds needed to operate the solution. She supported the BerryDunn contractual deliverable review and submission process, as well as the IV&V deliverable review and comment management effort for all of the IV&V resources. She participated in weekly meetings related to CMS Blueprint testing, test case verification for CMS scenario results, and submission of testing results to CMS for approval. She has experience with IBM® Rational Quality Manager (RQM), IBM® Rational Requirements Composer (RRC), and ALM Application Lifecycle Management (ALM) automated





## Kortney Ester, MBA, CSM

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	Bachelor of Arts in Sociology, Central State University Master of Business Administration, Mount Vernon Nazarene University Certified Scrum Master, Scrum Alliance

### Overview

Kortney is a certified Scrum Master with more than seven years of Eligibility & Enrollment experience and 12 years of Medicaid experience. Excellent communication and presentation skills, which have contributed to successfully coordinating external testing between a state-level Medicaid client and Centers for Medicare and Medicaid.

### Experience

**BerryDunn (03/2023 to present).** Kortney will serve as a General Project Manager on the following projects.

- **West Virginia Bureau for Medical Services (BMS) – Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2023 to present).**
- **West Virginia BMS – MES Incident and Case Management System (ICMS) Procurement Project (03/2023 to present).**

**KPMG, LLP (03/2021 to 03/2023).** Kortney worked as a Senior Associate in Advisory to consistently maintain 100% utilization, accurate timesheets, and schedule. She recorded and edited client-facing meeting minutes, capturing key decisions and action items, provided feedback and next steps to associate-level team members on their work as an engagement Transition Coach and SA, and managed project plan development, project artifacts, performance reporting and tracking, and communication, including testing and procurement items. She also researched, compiled, and analyzed data on other states and entities related to active/potential procurements. Kortney provided ongoing procurement support to a state Medicaid client, as well as participating in daily standup and client-facing meetings as a contributor and observer. She assessed processes and procedures to ensure implementation of lean practices, successfully coordinated external testing with a state-level client and Centers for Medicare & Medicaid Services (CMS) and oversaw MCO test data on behalf of a state-level client. Kortney led CMS Interoperability data exchange transformation testing for a state-level



## Ebony Carter, PMP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	<p>Bachelor of Science in Health Science, focus in Community Health, Towson University</p> <p>Master of Science in Health Science, focus in Community Health, Towson University</p> <p>Certified Project Management Professional® PMP®</p>

### Overview

Ebony is a highly qualified Healthcare Analyst and Program Administrator professional with 15 years of experience in Healthcare Policy, Medicaid-CHIP program, Eligibility, MMIS, Customer satisfaction, and program management. She has demonstrated analytic, Medicaid audit, and problem solving skills. Her expertise is in program monitoring, contracts management, finance/ budgetary maintenance, communication, and program evaluation

### Experience

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

- **West Virginia Bureau for Medical Services (BMS)**
  - *Payment Error Rate Measurement Project (PERM) (04/2022 to present)*  
Ebony is serving as a project SME for the PERM Project. In this project, Ebony is responsible for reviewing Data Processing (DP) request for more information, and validating DP errors.
  - *Fee Schedule Edit Quality Review Phase V (04/2022 to present)*  
Ebony is serving as a project SME for the Fee and Edit project. In this project, Ebony is responsible for researching and validating fee schedules and/or edits and delivering outcomes to the state of WV. While researching, she also reviews federal policy and state regulation to ensure that the fee schedule and edits are in line with existing and current policies.
  - *Public Health Emergency (PHE) Support Project (03/2022 to 06/2022)*  
Ebony assists with tasks related to the PHE project.
  - *PERM Advanced Planning Document (APD) (08/2022 to 01/2023)*



and state personnel to determine readiness for the initiation of DP reviews, and assisted with development of review workflow processes. Ebony conducted detailed audits of MMIS to determine if states paid Fee-for-Service and Managed Care claims according to Medicaid CFR and state regulations under the Payment Error Rate Measurement Project. She researched, analyzed, interpreted, and applied provider Medicaid enrollment, recipient eligibility (CHIP and Medicaid), risk based screening, and claims processing, CFR and state regulations when conducting audits of state claims. Ebony created operating procedures for navigating state MMIS systems, managed workflow through State Medicaid Error Rate Findings (SMERF) system and used the SMERF system, State MMIS, and eligibility systems to conduct audits. Ebony communicated with CMS about impediments that impede the team's ability to complete audits accurately and on time.

**Maryland Department of Health and Mental Hygiene (DHMH) (07/2008 to 08/2015).** Ebony worked as an Agency Grant Specialist to monitor the life cycle of all grants and the budget and expenditures for DHMH Office of Preparedness and Response (OPR) cooperative agreements for the Department of Health and Human Services, Center for Disease Control and (CDC) and Prevention and Assistant Secretary for financial Resources (ASPR). She supported senior management in maintaining fiscal records of preparedness activities such as syndromic surveillance, plan implementation, incident reports, and after action reports. She designed, developed, implemented, and interpreted grants assistance management policies, procedures, and best practices for monitoring cooperative agreements for CDC and ASPR. Ebony monitored a budget over \$30 million and was responsible for accounts payable paid by invoices used pay blocks according to the state of Maryland General Accounting principles. She developed standard operating procedures that adhere to CFR and Code of Maryland Regulations (COMAR) regulations, developed information packages for employees and awardees, and served as liaison to represent senior fiscal officer at staff meetings and conferences. Ebony monitored 23 counties and 1 city in the Medicaid Transportation Grant program for budget requirements and to ensure grantees and providers followed program goals, objectives, and regulations in accordance with CFR and COMAR). She analyzed and evaluated the program for efficiency and effectiveness of health care delivery and health initiatives by participating in routine audits (onsite reviews) of each jurisdiction ensuring compliance with COMAR regulations, Medicare and Medicaid regulations, and Maryland State Transmittals. She analyzed data for recipient Medicaid transportation needs, supported senior analyst in providing leadership and Medical Assistance Transportation guidance to state legislatures during conferences and workshops, and provided guidance on Managed care or Medicaid fee-for-service appeals. She managed, developed, implemented, and evaluated training curricula on Medicaid Managed Care, and Medicaid Transportation program. She developed standard operating procedures in drafting COMAR regulations to improve compliance with state and federal Medicaid and Medicare regulations.



their partner MITRE for OH, IL, and WY. She also led the MITA third-party assessment of Change Healthcare processes/platforms and the R3 Milestone review for State of IL PBM Module.

#### **Advocate Solutions (2014 to 2017)**

Alison served as a solutions professional and project manager for the Ohio Department of Medicaid. She wrote a Request for Proposal for new Pharmacy Benefits Management (PBM) Services, containing over 700 requirements, and served as a key contributor to the CMS Advanced Planning Document (IAPD) for new PBM services. She then managed the implementation of new PBM for the Ohio Department of Medicaid-duration of 18+ months, as well as the CMS Certification of the new PBM solution on state side using MECT 2.0 toolkit.

#### **Catamaran (formerly SXC) (2012 to 2014)**

As a Pharmacy Claims Manager for Indiana Medicaid, Alison managed all project activities throughout implementation including risk management. She spearheaded the CMS Certification process for the newly implemented PBM System and served as a key player in the PBM implementation project. In addition, Alison was responsible for claims processing system maintenance including additions of edits, utilization management criteria, and prior authorization criteria for the system upon request, as well as the interface between the drug rebate system and claims processing system including experience with both federal and supplemental rebate programs. She developed business requirements for the NCPDP D.0 transition, business design and system specifications for claims processing, test plans and over 1000 test cases, and end-user training documentation.

#### **Fusion Alliance (2010 to 2011)**

As a business consultant, Alison worked with Liberty Mutual to lead JAD sessions to develop and document, technical and business requirements, risk assessment, mitigation strategies and system design. She translated end-user business requirements to technical specifications for implementation of new call tracking software; improved business process to address inefficiencies in the claim intake process, resulting in improved response time from an average of 18 hours to less than 4 hours; and evaluated Commercial off-the-shelf (COTS) software for call tracking tools for intake call center for both cost efficiency and functionality.

#### **HP Enterprise Services (formerly EDS) (2007 to 2010)**

As the Director of Pharmacy Claims Processing, Alison was responsible for project management throughout the System Design Life Cycle (SDLC) for over 50 pharmacy IT related projects. This included all aspects of pharmacy business, including managing 11 employees, budgeting, and department profit/loss statements. She contributed to the success of several high-profile projects for Indiana Medicaid including the pharmacy benefit consolidation, which placed all pharmacy benefits management activities for 800,000 managed care members under the fee-for-service delivery system. This provided the IHCP with the ability to collect drug rebates for all claims for MCO members, resulting in a significant increase in drug rebate revenue. She also managed four large-scale project implementations, including a new pharmacy claims processing system implementation, Pharmacy Benefits Consolidation (Carve-Out), collecting National Drug Codes on physician administered drugs for the purpose of drug



## Rick Hayward

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	15 years
<b>Certifications and Education:</b>	Associate of Science in Math, Butler County Community College

### Overview

Rick brings over 30 years of experience in various roles in the IT industry, including over 20 years working with IT projects related to health and human services project. His experience includes Medicaid Management Information System (MMIS) operations oversight, leading Affordable Care Act (ACA) system modifications. His experience managing IT projects specifically for Medicaid and Health and Human Services gives him insight into many of the unique risks and challenges associated with delivering these projects on time and under budget. role.

### Experience

#### **BerryDunn (12/2023 – Present)**

Rick will work as a Senior Consultant with Bureau of Medical Services (BMS) where he will assist with data governance and Medicaid and CHIP Enterprise Systems (MCES) procurement and planning.

#### **State of Maine Department of Health and Human Services (DHHS) (05/2021 – 12/2023)**

Rick worked as an Operations Manager with Maine, where he provided oversight of the day-to-day MMIS operations activities of the State's fiscal agent. In this position, Rick addressed system operations, system change management, user acceptance testing, department communications concerning change management, state and federal audit responses, and vendor oversight for the states. His responsibilities include managing issues by leveraging the change request process, managing multiple system projects, and managing day-to-day operational activities to help ensure claims are processed appropriately to meet the business needs of multiple units. A significant role for this position is holding the vendor accountable to operational system performance standards, defining performance service level agreements (SLAs), and adhering to contractual obligations. Rick also assists in major system procurement and upgrade planning including, but not limited to, defining contract modifications, setting performance SLAs, outreach to other states, system demonstration planning, research on customization carry-forward and discussions with the Centers for Medicare & Medicaid Services (CMS) on upgrade planning and certifications.

#### **Protech Solutions (10/2019 – 04/2021)**



**Dorothy Ball, BA**

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

**Overview**

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

**Experience**



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

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

Consulting roles and projects include:

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

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

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



- 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.





- *ICD-10 Implementation (03/2013 to 04/2016)*: Cynthia worked on the ICD-10 Implementation Project and provided support to the Project Manager as a SME on healthcare policy. She assisted in the remediation of the BMS Provider Policy Manual for ICD-10 implementation, facilitated Policy Workgroup Sessions with program areas, and assisted in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.
- *Adult Quality Measures Grant Project (03/2013 to 10/2016)*: Cynthia supported the collection and reporting of the Adult Core Quality Measures and the implementation of the BMS Quality Unit. She assisted with the development of training materials; coordinated training workshops, provided training to staff and to providers; served as a resource for providers, stakeholders, and partners requesting assistance; provided expertise in the development of trainings that focused on educating providers in collecting and reporting on the Adult Core Measures, as well as in development of staff training that included the use of tools for collecting and analyzing the data from claims, surveys, medical records, and encounter records; and worked with the Data Manager and Data Analyst to ensure best practices related to data collection and analysis.
- *Affordable Care Act (ACA) Project (12/2012 to 08/2013)*: Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.

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

- *MMIS Coordinator's Office (06/2006 to 12/2011)*: Cynthia provided business analysis and project support for the MMIS implementation and certification; assisted with the development of an APD and Invitation to Bid for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a Recipient Web Portal, Provider Web Portal for enrollment and re-enrollment, National Correct Coding Initiative (NCCI) edits, and 5010 compliance; and assisted with the development of APDs for NCCI and ICD-10.
- *IV&V and Technical Assistance of the FA MMIS Implementation (04/2006 to 10/2008)*: Cynthia provided project management support; monitored and tracked correspondence between the Agency, FA, and IV&V vendor; reviewed and compiled Agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the Project Manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the Agency and FA delivery schedule.
- *Managed Care External Quality Review (EQR) (06/2006 to 05/2011)*: Cynthia served as



## Susan Chugha, Prosci® CCP

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

### Overview

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

### Experience

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

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



tracked against the agreed-upon schedule that will address data quality and usability issues identified within the Medicaid program.

- *State Plan Review and Support (SPRS) Project (03/2020 to present).*  
As program manager, Susan oversees the project and BerryDunn team that handles updates to State Plan sections, attachments, supplements, and develops amendments.

Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages are in compliance, compared service descriptions to federal and state guidance, and analyzed pages for overall accuracy.

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

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

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

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

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

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

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



- **Project Specialist – Assistant Vice President**

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

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

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

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

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



## Zach Rioux, PMP, Prosci® CCP

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	Bachelor of Science in Political Science and Psychology, University of New England Certified Project Management Professional Prosci® Certified Change Practitioner MLC Certified Medicaid Professional (MCOMP-II)

### Overview

Zach is an experienced project manager and health information technology (IT) professional with a proven record leading successful projects and project management organizations for state Health and Human Service (HHS) agencies. As a senior manager within BerryDunn's Government Consulting Group, Zach has managed Medicaid Management Information System (MMIS) implementation and certification efforts, facilitated multiple state HHS strategic planning and procurement efforts, and directed portfolios of work focused on strategic planning, data management, and project management related initiatives. Whether Zach's managing an effort to help the Puerto Rico Medicaid Program (PRMP) achieve their first ever MMIS Centers for Medicare and Medicaid Services (CMS) certification; or managing a portfolio of over 18 initiatives for West Virginia Department of Health and Human Resources (DHHR), he brings comprehensive knowledge of project management, state IT procurements, CMS certification, vendor management, and health IT system implementations. Zach's ability to bring together, manage, and partner with large, cross-functional teams makes him an integral resource to any State HHS agency looking to improve its health IT enterprise.

### Experience

**BerryDunn (05/2013 to present).** Zach is dedicated to working with state agency clients across industries, including health and human services and Medicaid agencies.

#### **Puerto Rico Department of Health and Human Services (DHHS) (06/2019 to present)**

- *Federal Fiscal Year (FFY) 2021-2022 Enterprise Objective Monitoring and Control (EOMC) Services (10/2020 to present).*

Zach is currently serving as an engagement manager for BerryDunn's FFY2021-2202 EOMC services SOW with the PRMP. In this role, Zach is responsible for managing over 22 resources and providing oversight, guidance, and expertise in support of the following:



- Facilitation of discussions among ONC, CMS, PRMP, HealthGorilla (HIE system integrator), Intervoice (PMO), and other vendors to assist in the planning and implementation of a Health Information Exchange (HIE) and Enterprise Data Warehouse (EDW)
- Oversight of an assessment of the current Health Information Technology (HIT) landscape (business, technical, infrastructure, security, etc.)
- Oversight and support for the integration of HIT assets into the MITA SS-A framework to help maximize enhanced federal financial participation (FFP) for PRMP
- Oversight to assist in updates to Puerto Rico's State Medicaid Health Plan (SMHP)
- Assistance and subject matter expertise for the development of an HIT and HIE APD
- Facilitation of discussions with CMS, ONC, and/or PRMP relating to the HIT and HIE APD's review and approval
- Delivering on all HIT EOMC services and maintaining a budget of approximately \$1 million within a single FFY
- Adherence to contract requirements, scope, services, timelines, and budget
- *Federal Fiscal Year (FFY) 2020 Puerto Rico Eligibility and Enrollment (PREE) Enterprise Objective Monitoring and Control (EOMC) Services (11/2019 to 09/2020).*  
As the engagement manager for BerryDunn's FFY 2020 PREE EOMC Services SOW, Zach facilitated, provided oversight, and managed a team of four resources in support of PRMP's PREE system implementation and OBC effort. In this role, Zach also helped to ensure the FFY 2020 PREE EOMC services SOW was managed as a single portfolio in conjunction with the FFY 2020 MMIS Phase Two EOMC Services SOW and the FFY2020 HIT EOMC Services SOW. As an engagement manager, Zach was also responsible for the following:
  - Facilitating discussions and/or providing guidance to inform discussions among CMS, PRMP, Intervoice (PMO), RedMane (Eligibility and Enrollment [E&E] system integrator), Wovenware (local interface integrator), V2A (organizational change management vendor), and NTT Data (IV&V vendor)
  - Providing subject matter expertise and project management expertise in support of the PREE system implementation and certification effort
  - Identification of PREE implementation issues and/or risks as well as proposed resolution or mitigation strategies
  - Guidance, management, and expertise to help facilitate and execute PREE OBC discussions, and planning efforts



- Facilitating and develop tools to aid PRMP in maintaining their Medicaid enterprise APDs
- Managing a team of over three resources to complete Puerto Rico's 2018 – 2019 MITA SS-A and Roadmap
- Providing management and oversight to a team of three resources responsible for the development of five contract recommendation memorandums focused on providing recommendations for issues and/or risks within PRMP contracts
- Adhering to contract requirements, scope, services, timeline and budget
- *Enterprise Objective Monitoring and Control (EOMC) Services (06/2019 to 09/2019).*  
Zach was a business analyst, SME, and then a project manager in support of the PRMP's efforts to obtain CMS certification of program integrity, enterprise/technical, encounter processing, and data warehouse related MMIS functionalities. These MMIS related functionalities were Puerto Rico's first MMIS and first CMS certification effort. Additionally, this CMS certification effort was a pilot of CMS' OBC. Zach's responsibilities in support of the OBC effort included, but was not limited to:
  - Providing subject matter expertise, business analyst, and project management support to PRMP to help achieve CMS' OBC approval of the aforementioned MMIS functionalities
  - Collaborating with the Puerto Rico OBC Work Group (OBC WG) comprised of representatives from CMS, MITRE, PRMP, DXC (system integrator), and Intervoice (PMO)
  - Facilitating discussions among the OBC WG to help obtain CMS' certification and approval of PRMP MMIS functionality
  - Collaborating and leading a team of four business analysts and SMEs
  - Helping PRMP to prepare for CMS on-site reviews and presentations
  - Facilitating the review of certification evidence prior to submission to CMS
  - Facilitating and/or contributing to the development of objective and independent assessments on the status of PRMP's certification effort
  - Facilitating and/or contributing to the development of CMS Progress Status Reports

**West Virginia Department of Health and Human Resources (DHHR) and the Bureau for Medical Services (BMS) (05/2013 to 12/2019)**

- *Enterprise Portfolio Management Office (EPMO) Project (09/2018 to 12/2019).*  
Zach was a project manager and then a program manager for the EPMO project. In this



Zach served as the project manager for the TEPMS Project, and provided project management, strategic planning, and subject matter expertise to aid in meeting several MITA SS-A goals and objectives. As the project manager, Zach was also responsible for oversight and assistance in project status, budget, and resource tracking, maintenance, and reporting, as well as escalating project risks and issues to client executives.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (12/2016 to 01/2017).*  
Zach served as a business analyst for the 2017 MITA SS-A and assisted the State in successfully completing its annual MITA SS-A. Zach's focus for assistance was primarily in the MITA business process area of Plan Management.
- *Project Management of MMIS Procurement, DDI, and Certification (05/2014 to 10/2016).*  
Zach served as the project lead, overseeing teams for the following areas:
  - **Operations Management:** Oversight of the Fiscal Agent and BMS & Office of Management Information Services (MIS) MMIS Operations during the MMIS DDI Post Implementation and Stabilization period.
  - **Change Management:** Oversight of the Fiscal Agent, BMS, and MIS change management process to ensure compliance with state and federal change management policies.
  - **Documentation Management:** Oversight of all documentation submitted by the MMIS Fiscal Agent and State for compliance with federal and State policy, contractual requirements, and quality standards.
  - **Certification Management:** Oversight and assistance successfully completing the WV MMIS CMS Pilot Certification Process with the State and MMIS Fiscal Agent.

In Zach's previous roles on the MMIS DDI, he assisted the State as the operational readiness testing lead as well as the deliverable review manager. Zach also contributed as a business analyst and participated in the review of design- and testing-related documentation.

Zach's assistance on this project led to the MMIS DDI and Certification effort being completed on time, on budget, and without a single change order.

- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 08/2016).*  
Zach has previously served as the project manager for the Access to Care Monitoring Phase. In this role, Zach oversaw a team of six BerryDunn professionals and worked closely with key State stakeholders to develop a West Virginia Access Monitoring Review Plan. The plan identified data baselines, thresholds, assumptions, and trends and incorporated provider and beneficiary feedback to the extent necessary for the State





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compiled from the survey; and researching and compiling disparate information into coherent and well-organized appendices.

**Massachusetts HIX/IES Entities – IV&V Services (05/2013 to 08/2013).**

Zach worked with the BerryDunn project team to analyze system implementation requirements and create user test cases to demonstrate system requirements have been met.

**US Senator Susan M. Collins (05/2011 to 12/2012).** As an assistant in two of Senator Collins' offices, Zach assisted constituents and staffers with a variety of tasks and wrote professional letters and memos for Senator Collins.



training materials for the eligibility staff, which are being created by BerryDunn's team, most recently including an extensive AVS training.

Finally, Shea leads BerryDunn's project management support services. For this portion of the project, Shea focuses on:

- Vendor management support, including contractual compliance monitoring and escalation
  - Extensive policy and procedure review and updates
  - Overseeing implementation activities, such as developing an implementation plan, assisting with pilot activities, establishing KPIs and monitoring mechanisms, and rewriting job descriptions
  - Planning for release cycles, including design, testing, and operational readiness
  - Supporting the development of an effective leadership team prepared to guide their teams through change, including offering strategic change management services
  - Redesigning processes to improve the quality, accuracy, timeliness, and efficiency of the services provided
  - Managing the implementation of a new client service delivery model that will positively transform the organization for MQD's staff and the clients they serve
  - Project Management of Hawai'i's AVS system implementation, including vendor management and conflict resolution between multiple service vendors (for AVS and the eligibility system)
- **Alaska Division of Health Care Services (HCS) – MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to 02/2021).**  
The BerryDunn team is assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support. This included an extensive current state assessment, including staff assessments, web-based research, options analysis, competitive analysis, and cost research; and a final MMIS Modernization Recommendations Report was provided. Shea was the lead reviewer of this report, which ultimately provided multiple future strategic MES modernization options.
  - **Missouri Office of Administration Information Technology Services Division – State Medicaid IT Assessment Project (07/2019 to present).**  
Shea serves as the consulting manager for the Missouri State Medicaid IT Assessment Project. For this project, Shea is leading the assessment of the State's current IT governance approaches and the development of short- and long-term recommendations. Ultimately, BerryDunn will develop a recommended future IT Governance Model. Shea



between the State and the Vendor to address and remediate issues. This required that she facilitate executive level stakeholder meetings with the State, the MMIS vendor, and CMS. Shea also served as a design track lead for the utilization management, care management, provider management, and general/technical tracks. For each track, she was responsible for managing the repository of action items, organizing resources, and tracking decisions. She is also responsible for analyzing vendor deliverables aligned with her tracks to ensure the correct project documentation has been provided and is available for future use.

- **West Virginia Department of Health and Human Resources (DHHR).**
  - *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016).* Shea served as the project lead for the DHHR Office of Management and Information Services' (MIS') eligibility and enrollment Vendor transition project. West Virginia had a condensed time frame to transition the maintenance and operations of their existing eligibility system from one vendor to another. Shea led and facilitated key knowledge transfer and the resolution of critical project issues. Additionally, she managed a team of five in supporting MIS in deliverable review, risk and issue tracking and mitigation, and executive status reporting.
  - *Eligibility and Enrollment RFP Development Assistance (10/2015 to 01/2016).* Shea served as the requirements manager for this project. As a member of the project management team, Shea supported the development of the approach to gather requirements from the State agencies that are targeted for inclusion in the RFP, including the Child Care system, the SACWIS system, the Child Support System, and the core eligibility and enrollment solution that services a variety of assistance programs including Medicaid, CHIP, SNAP, TANF, LIEAP, and other West Virginia specific assistance programs. Shea led the requirements development process, facilitated JRP sessions, and escalated risks and issues to impacted stakeholders. Shea developed responses to vendor questions and created the final question and answers procurement document for the engagement. She also led the development of the evaluation materials and scoring methodology for the procurement, and led and facilitated the evaluation committee during scoring sessions. Finally, Shea led the team in supporting the State with the development of the final procurement packages, including providing consulting services to both the State and the Federal Partners during the review of the final selection.

**CIMCO Building Services (06/2012 to 08/2013).** Shea focused on strengthening the company's ties to their clients by performing site visits, carefully watching safety compliance, and ensuring quality work. From March 2013 to August 2013, she focused on project management by reviewing cost and inflation, performing quality checks, managing risks, and



## Brandon Milton, MBA, PMP

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	Bachelor of Science, Business Administration and Political Science, University of Maine Master of Business Administration, University of New Hampshire Certified Project Management Professional

### Overview

Brandon is a principal in our Medicaid practice group with more than more than ten (10) years' experience as a Project Manager and/or providing project management support services directly related to the analysis, development and/or implementation of programs, initiatives for a State Medicaid Agency. He specializes in Medicaid Enterprise Systems and is a certified Project Management Professional® with a successful track record of managing large information technology projects on time and on budget.

### Experience

**BerryDunn (07/2011 to present).** Brandon specializes in working with Medicaid agency clients. Notable project work includes:

- Alaska Division of Health Care Services (HCS) – MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to present).**  
Brandon is the project principal for BerryDunn's team overseeing the work performed by our project team, assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support.
- Hawai'i Department of Human Services Med-QUEST Division (MQD) – Organizational and Business Process Redesign (07/2017 to present).**  
Brandon is currently serving in the role of project director / IT lead for a business process redesign effort for the customer-facing sections of Hawaii's MQD. His work includes identifying opportunities for the State to leverage its new Medicaid eligibility determination system to improve efficiency and the customer experience. Phase two of the project just completed, which culminated in a findings and recommendations report that included recommendations for organizational transformation of eligibility offices and call centers.
- New Jersey Division of Medical Assistance and Health Services – MMIS**



- Operational readiness plans
- Training Plans
- CMS Certification evidence
  - Planning and execution of user acceptance testing
  - Planning and quality assurance reviews of CMS certification evidence.
  - Planning and execution of operational readiness testing
  - Oversight of service-level agreements and system performance in operations

The West Virginia MMIS went live in January of 2016 and the State received their certification letter from CMS in October 2016.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014).*  
Brandon provided project management and quality assurance services for the BMS' DW/DSS implementation. As part of this effort, he facilitated business process redesign sessions with the Program Integrity staff to align their business processes with the new case management system. He also facilitated requirements validation sessions; worked with the State in identifying potential data suppliers; and worked with the selected suppliers to determine the data feeds they will provide the DW/DSS. He facilitated design sessions between the State, data suppliers, and vendor to determine the data elements that would make up each of the data feeds. In addition, he developed test cases for UAT to provide end users with assurance that the system processes information according to requirements.
- *Provider Enrollment (PEA) Project.*  
Brandon provided project management support for the DDI of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He created status reporting deliverables and assisted the project manager in executing the project according to the project management plan.
- **Missouri Department of Social Services – Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services.**  
Brandon provided project management oversight and subject matter expertise for the development of evidence packets for CMS gate reviews of MEDES. This work included identification and validation of system evidence to align with the checklist criteria from



## Liz Vose, MPA

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

### Overview

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

### Experience

#### **BerryDunn (02/2022 to present) West Virginia Department of Health and Human Resources (DHHR) (07/2022 to present)**

- *Mountain Health Promise (MHP) re-procurement project (07/2022 to present)*  
Liz serves as Medicaid Managed Care Subject Matter Expert.
- *Mountain Health Trust (MHT) re-procurement project (09/2022 to present)*  
Liz serves as Medicaid Managed Care Subject Matter Expert.

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

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

- *Director of Compliance and Communications (05/2015 to 03/2019).*



## Brody J. McClellan, MPA

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

### Overview

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

### Experience

#### BerryDunn (09/2021 to present)

##### West Virginia Department of Health and Human Resources (DHHR) (09/2021 to Present)

- ✓ *Mobile Crisis Services Planning Project (09/2021 to present)*  
Brody serves as Project Lead to create a new State Plan Amendment for West Virginia Medicaid to provide Community Based Mobile Crisis Intervention Services.
- ✓ *Mental Health Parity Compliance Project (09/2021 to 9/2022)*  
Brody served as Project Lead to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and CHIP to ensure compliance with federally mandated mental health parity rules.
- ✓ *Mountain Health Promise (MHP) re-procurement project (09/2021 to present)*  
Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.
- ✓ *Mountain Health Trust (MHT) re-procurement project (09/2021 to present)*  
Brody serves as Medicaid Finance and Actuarial Subject Matter Expert.



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

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





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

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

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

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



## Julie DuPuis, MPA

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

### Overview

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

### Experience

#### **BerryDunn (06/2022 to present).**

- **West Virginia DHHR**
  - *MES and EDS projects (06/2022 to present)*  
Julie serves the EDS project as an SME supporting data profiling, testing and requirements gathering support.
  - *MES MSP Project (06/2022 to present)*  
Julie serves the Medicaid Enterprise System Modernization Strategy and Procurement project as an SME supporting requirements gathering and research support.

**Michigan State University (12/2016 to 06/2022).** Julie served as data resource analyst and Medicaid specialist to help 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



## Jeff Stoddard

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Consulting Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	18 Years
<b>Certifications and Education:</b>	Bachelor of Science in Management of Information Systems, University of Vermont Health Leadership Development Program, Daniel Hanley Center for Health Leadership

### Overview

Jeff is a proven strategic healthcare data, technology, and analytics leader. He focuses on building data management, analytic, and reporting systems. Jeff excels in interacting with diverse stakeholders, building consensus, and developing successful working relationships while achieving project objectives. He maintains a keen focus on finding solutions that help clients achieve operational efficiencies, improve quality of care, and reduce costs.

### Experience

#### BerryDunn (12/2019 to present)

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

#### West Virginia Bureau for Medical Services (BMS)

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



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**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.



- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).**

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

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

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

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

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

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

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



planned initiatives that must take place for the HIX to become fully operational and comply with Federal healthcare reform requirements.

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

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

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

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

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

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

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

Ryan served as project manager for a system 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.



## Miles Isacke, Prosci® CCP

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	Bachelor of Applied Arts, Mathematics, Bates College

### Overview

As a technical manager, Miles focuses on the design and implementation of decision support tools – from enterprise data warehouse solutions to custom reporting tools. He works with clients to understand business, data and infrastructure requirements. He leads development projects for data warehouse solutions and other client decision support tools responsible for the data quality, testing, and efficacy of various client-facing solutions.

Miles' other skills include programming and analytical support; constructing, testing, and implementing reporting tools; constructing systems and procedures to assure the quality of data processing output; and performing quantitative analysis. Miles has programming expertise in SQL, PL/SQL, T-SQL, SAS, Visual Basic, and Microsoft Office.

### Experience

#### **BerryDunn (formally Compass Health Analytics) (2013 to present)**

- **Community Care Behavioral Health – Data Warehouse and Decision Consulting Services (09/2013 to present)**

Miles has served as the primary analyst, advisor, and architect for data warehouse planning and decision support tool implementation for the Behavioral Health Medicaid MCO. The work focuses on gathering client requirements, designing, building and maintaining the data warehouse and broad decision support systems at Community Care Behavioral Health.

- **Missouri Department of Mental Health – EHR Business Planning (10/2021-04/2022)**

Miles served as strategic data advisor for the procurement of a new EHR. with the project required working with client stakeholders to construct current-state documentation and build out future-state requirements. Miles helped develop strategic recommendations to meet project goals and avoid unforeseen risks in the implementation and integration of a new EHR product.



## Lars Loren

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	22 years
<b>Certifications and Education:</b>	Bachelor of Arts in Physics, Dartmouth College Juris Doctor, Stanford University

### Overview

Lars is a member of BerryDunn's Health Analytics Practice Group and former leader of its Data Management Practice, contributing to diverse projects, nearly all of which involve health insurance claim data for commercial and Medicaid populations. These projects include data quality control and analysis of APCDs for state government clients, as well as architecture, development, and analysis of data warehouses and analysis systems for state Medicaid programs, provider sponsored ACOs, and nonprofit insurers. More generally, he has wide experience in process analysis and reporting and decision support systems. He has participated in all aspects of this work, from hands-on analysis and design to consultation with senior managers on system selection and organizational development.

### Experience

**BerryDunn (06/2003 to present).** As former director of analytics at BerryDunn and the firm it acquired, Compass Health Analytics, Lars analyzes MCO operational and financial planning business processes and consults with MCOs on decision support organization, strategy, architecture, and data design. He has managed system development projects for MCO and disease management firms and designed related databases. He has managed other research projects at the firm and provided analytical input, such as analysis of legislative intent and the impact of mandated insurance coverage on premiums.

**ISDM, Inc. (12/1997 to 06/2003).** As a consultant in a small firm with a national practice focused on marketing and CRM systems, IT planning, and process improvement, Lars worked across various projects as an analyst, project manager, and systems and data architect. Among other projects, he managed a project to implement CRM software for a mid-sized investment banking firm and evaluated and recommended changes in a demand forecasting process.

### Other Experience

For Advanta Corporation, Lars served as an internal consultant managing project planning and justification to redesign the customer acquisition database and process.





## Fei Zou, MS

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

### Overview

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

### Experience

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

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

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



**Marvin (Ed) Crawford**

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

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 Medicaid Management Information Systems (MMIS) and Eligibility & Enrollment (E&E) projects.

**Experience**

**BerryDunn (04/2019 to present).**

Ed serves as part of BerryDunn’s Medicaid Practice Area, working with the West Virginia Bureau for Medical Services on project management initiatives.

- **West Virginia Department of Health and Human Resources (DHHR) – People’s Access to Help (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 Bureau for Medical Services (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 Bureau for Medical Services (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.



## Adam Bowman

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	8 years
<b>Certifications and Education:</b>	Bachelor of Science in Computer Science, West Virginia State University Minor in Mathematics CompTIA Security+ Certified

### Overview

Adam is an experienced IT security professional, who brings a background supported by 11 years in the United States Air Force. Adam is also a consultant in BerryDunn's Medicaid consulting practice. He brings three years of project management experience after working in the testing, functional, technical, and resource management pieces of People's Access to Help (PATH).

### Relevant Experience

#### BerryDunn (10/2019 to present)

- **West Virginia Department of Health and Human Resources (DHHR) - People's Access to Help (PATH) DDI Project Management (10/2019 to present).** Adam supports the WV DHHR's PATH Project by leading and coordinating PMO related business planning efforts by utilizing an array of software applications to process, organize, and analysis data. He closely monitors multiple work streams to ensure that the project remains on track, meets deadlines, and develops according to plan. Adam is also the point of contact for all Issues, Risks, Action Items, Assumptions, Decisions (IRAAD).

Prior to these roles, Adam supported the WV DHHR's PATH Project as a Project Coordinator responsible for documenting meeting activities, coordinating the review and delivery of multiple status reports, and performing test case execution.

#### United States Air Force (03/2012 to present)

- Adam supports an Aeromedical Evacuation Squadron by supervising logistical and equipment technicians to ensure medical equipment is stocked, operational, and ready to deploy. He also plans, organizes, and performs network operations to include establishment, operations, information assurance and defense in support of joint, national and Air Force objectives. Provides cyberspace expertise to commanders and Joint Task Forces (JTF) for cyber operations, command and control communications, and information management. Translates system operational concepts, requirements, architectures, and designs into detailed engineering specifications and criteria to present



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

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	16 years
<b>Certifications and Education:</b>	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).*



submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

- ***MMIS Fee Schedule and Edit Quality Review (09/2017 to present).***  
Dawn served first as project subject matter expert (SME) and then as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and to provide analysis of cost savings opportunities for BMS.

- ***TPL Procurement (05/2019 to 03/2022)***  
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.

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

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

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

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

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

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

**Valley Health Systems, Inc. (12/2009 to 07/2017).** Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on



## Jason Hargrove, MBA, PMP

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

### Overview

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

### Experience

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

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



responses. Additional responsibilities included overseeing facility leases, maintenance, construction, and expansion as needed.

- **Strategic Project Manager** – In this role, Jason was responsible for the direction, coordination, and completion of assigned strategic projects. He also assisted with business development and RFP responses, developed and implemented project management tools and tracking methods, and managed administrative office and project staff members.

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

- **Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017)**. Jason served in several capacities on the Ohio project including business development, project leadership and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams and coordinating on-site staff. During the project, the named Implementation Manager left the organization and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation and client relations.
- **Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016)**. As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.
- **Iowa Medicaid Enterprise PBM (04/2012 to 10/2013)**. Jason led the re-procurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SMEs in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.
- **Utah CMS certification support (2012)**. Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were



## Christa Bernacchia

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	23 years
<b>Certifications and Education:</b>	Bachelor of Arts in Mass Communications, Quinnipiac College

### Overview

Christa leads a team of credentialing professionals and is responsible for the overall vision of the credentialing division, including the firm's National Committee for Quality Assurance (NCQA) Credentials Verification Organization (CVO) certification. She is an accomplished healthcare strategist and problem-solver with more than two decades of experience in the industry with a focus on credentialing, recredentialing, privileging, enrollment, primary source verification, accreditation, and quality improvement. She has proven expertise in developing relationships, overseeing project planning and implementation, and conducting workflow redesign to improve efficiency and quality.

Christa's experience includes working for a staff model health maintenance organization (HMO), where she managed all internal credentialing, including primary source verification, privileging, Joint Commission accreditation, special projects, and emergency planning efforts. Christa also works on various consulting engagements, providing subject matter expertise to health systems, State Medicaid Agencies, and other healthcare entities from the provider lens.

### Experience

**BerryDunn (01/2021 to present).** As the BerryDunn Director of Credentialing Services, Christa is responsible for the overall growth and vision of the credentialing service line, including the NCQA CVO certification and credentialing consulting offerings. Christa works with a dedicated team to build relationships and manage client communications and services, including commercial insurance carrier and governmental payer enrollments, as well as credentialing, privileging, and ongoing/exclusion monitoring needs. Services are provided nationwide and the BerryDunn credentialing team works with nearly 300 payers, including Medicaid, Medicare, MCO and Advantage carriers.

**VantagePoint HealthCare Advisors (10/2016 to 12/2020).** As the Director of Credentialing Services, Christa managed a team of credentialing specialists and was responsible for the operational oversight of the Credentialing Department, including the organization's NCQA CVO certification.

**HealthyCT, Inc. (03/2016 to 10/2016).** As the Quality Improvement Analyst, Christa supported activities and projects related to credentialing, recredentialing, data analysis, reporting, HEDIS,





**Sue Prior**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	29 years
<b>Certifications and Education:</b>	Bachelor of Arts, University of Connecticut Certified in Healthcare Compliance through HCCA

**Overview**

Sue is a principal in BerryDunn’s Healthcare Group, joining the firm in 2021 as part of the merger with VantagePoint Healthcare Advisors. Sue helps clients address the demands of today’s rapidly changing healthcare market, developing effective and proactive strategies designed to improve their business and help them stay competitive.

In her more than 25-year career, Sue has served as a director for a nationally recognized chain of nutrition centers and in executive positions across various academic hospital systems, medical practices, and management services organizations.

Sue’s diverse background and certification in healthcare compliance positions her to effectively assist clients with strategic planning, revenue integrity, and operations optimization.

**Experience**

**BerryDunn (01/2021 to present).** As principal, Sue provides business solutions to clients, enabling them to address the demands of today’s rapidly changing healthcare market by conducting periodic revenue cycle and compliance assessments; develops effective, proactive strategies; and executes short- and long-term projects designed to improve their business, enhance patient satisfaction, and help them stay compliant with changing regulations in competitive markets. Leveraging her diverse background Sue effectively assists clients with strategic planning, contract negotiation, business analytics program development, and revenue cycle, compliance, and credentialing operational optimization. She works with a variety of clients, including private practices, integrated health systems, ASCs, LTACs, and PE firms.

**VantagePoint HealthCare Advisors (1999 to 01/2021).** As president and CEO, Sue led VantagePoint HealthCare Advisors in providing business solutions to clients, enabling them to address the demands of today’s rapidly changing healthcare market by conducting periodic revenue cycle and compliance assessments. She also developed effective, proactive strategies and executed short- and long-term projects designed to improve her clients’ businesses, enhance patient satisfaction, and help organizations stay competitive. Sue also assisted with healthcare alignment strategies for hospitals and physicians.



## Matt Oatten

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

### Overview

Matt 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 DHHR**
  - *MES and EDS projects (07/2022 to present)*  
Matt serves the EDS project providing business analysis and project coordination support.
  - *MES MSP Project (07/2022 to present)*  
Matt 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).** Matt 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 five 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 to meet timelines. Matt 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.



## AJ Mong

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

### Overview

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

### Experience

#### BerryDunn (07/2022 to present)

- **West Virginia DHHR (07/2022 to present)**
  - *MHP Re-Procurement Project (07/2022 to present)*  
AJ serves the MHP Re-Procurement Project providing business analysis and project coordination support.
  - *MHT Re-Procurement Project (09/2022 to present)*  
AJ serves the MHT Re-Procurement Project providing business analysis and project coordination support.
  - *MES MSP Project (07/2022 to present).*  
AJ serves the MES MSP Project providing business analysis and project coordination support.

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

**Frederick Douglass Elementary School (09/2013 to 06/2020).** AJ served as an elementary school counselor with the School Leadership Team and Focus School Improvement Team to take the school from one of the bottoms 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of



**Jon Watkins**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	8 years
<b>Certifications and Education:</b>	Bachelor of Science in Criminal Justice, West Virginia University at Parkersburg

**Overview**

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

**Experience**

**BerryDunn (10/2021 to present).**

- **West Virginia Department of Health and Human Resources (DHHR)**
  - *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 to 11/2022).*  
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon’s work will help to ensure the State has a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.
  - *WV (West Virginia) Public Health Emergency (PHE) Support Project (12/2021 to 12/2022).*  
Jon provides project coordination and monitors project risks and issues to assist the WV Department of Health and Human Resources with temporary flexibility that provides services to different beneficiaries during the Public Health Emergency. Jon’s work helps to keep the client informed and helps ensure the project meets its goals and objective.
- **West Virginia Bureau for Medical Services (BMS)**
  - *Mountain Health Trust (MHT) Re-Procurement Project (3/2022 to 7/2023).*  
Jon provides project coordination and monitors project risks and issues



## Cate Poling

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	9 years
<b>Certifications and Education:</b>	Associate in arts Degree, emphasis in English, West Virginia University Parkersburg MLC Certified Medicaid Professional (MCMP)

### Overview

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

### Experience

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

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

**Mountain State Eye Associates (04/2017 to 06/2021).** Caitlin was a Certified Ophthalmic Assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide minor in-office surgical procedures, and prepare patients for cataract surgery. She



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

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

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

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

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

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



## Hailey Holden

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

### Overview

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

### Experience

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

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



## Alycia Minshall

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Editor
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	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 requests for proposals; case studies; meeting notes; and more. She helped to ensure consistency in voice, brand, and tone across messaging channels, as well as helping to ensure that all materials are well written, accurate, properly researched, objective, concise, and focused. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.





## Caitlin Cabral

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Editor
<b>Years of Experience Relevant to Proposed Role:</b>	3 years
<b>Certifications and Education:</b>	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 processes. 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



**Emily Hendrickson**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Paraprofessional
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	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, and proficiency in schedule management. She also acted as class advisor to the senior class, which involved organized



## Janine DiLorenzo

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Editor
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	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.



## Jonathan Williams

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Editor
<b>Years of Experience Relevant to Proposed Role:</b>	15 years
<b>Certifications and Education:</b>	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](http://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.



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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for ISO auditing and company records. She created Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**

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

- **Minnesota Health Benefit Exchange (MNSure) – Programmatic Audit (10/2015 to present).**

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.

- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**

Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

**Webber Energy Fuels (2004 to 2014).** As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, the State Project Management Office (PMO) will develop and deliver a status report to the DoHS and BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
2	Monthly Status Report	On a monthly basis, the State PMO will develop and deliver a status report to the DOHS Executive Steering Committee. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
3	Modular RFP(s)/RFQ(s)	Utilizing the previously prepared Strategic Plan for MCES modernization, BerryDunn will provide procurement advisory services to support the activities surrounding the procurement(s) of MCES Modules.
4	Vendor Questions Packets	During the procurement phase, BerryDunn will assist the State with facilitating responses for up to two rounds of vendor questions and answers.
5	Proposal Evaluation Packets	Proposal evaluation packets to assist the Evaluation Team during evaluation meetings and scoring sessions.
6	IAPD(s)	BerryDunn will assist DOHS in the development of MCES module IAPD(s); however, the State will maintain responsibility for submission of the document. The IAPD(s) will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610.
7	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project





## Appendix C: Abbreviations, Terms and Acronyms

**Table 5: Abbreviations, Terms and Acronyms**

Acronym	Definition
ACA	Affordable Care Act
ACES	American Copy Editors Society
APD	Advance Planning Document
BMS	Bureau for Medical Services
BPH	Bureau for Public Health
CCP	Certified Change Practitioner
CFR	Code of Federal Regulations
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
CMA	Central Master Agreement
DAF	Deliverable Acceptance Form
DDI	Design, Development, and Implementation
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
DoHS	Department of Human Services
DLA	Division of Legislative Audit
E&E	Eligibility & Enrollment
EDQ	Encounter Data Quality
EDS	Enterprise Data Solution
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
EVV	Electronic Visit Verification
FFS	Fee for Services
HBE	Health Benefit Exchange
HCS	Division of Health Care Services



Acronym	Definition
PMP®	Project Management Professional®
POS	Point of Sale
QA	Quality Assurance
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Quotation
SDLC	System Development Life Cycle
SIT	System Integration Testing
SNAP	Supplemental Nutrition Assistance Program
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
SME	Subject Matter Expert
TANF	Temporary Assistance for Needy Families
UAT	User Acceptance Training
USVI	United States Virgin Islands
WVCHIP	West Virginia Children's Health Insurance Program
WVU	West Virginia University



STATE OF WEST VIRGINIA  
DEPARTMENT OF HUMAN SERVICES  
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.  
Cabinet Secretary

Cynthia Beane  
Commissioner

DATE: January 23, 2024  
TO: Office of Shared Administration/Finance  
FROM: Lakendra Burdette *LB*  
Procurement Specialist  
RE: PF1363932, CDO BMS24\*23  
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order anticipates making payments for months 1-2 in SFY 24 and months 3-4 in SFY25.

Contract service period: 02/14/2024 – 06/14/2024. Funding allocation table below:

	CDO BMS24*23 Medicaid & Children's Health Insurance Program (CHIP) Enterprise System (MCES) Procurement Assistance Project	
	02/14/2024 - 06/14/2024	
	PR05 SYF24 02/14/23-04/30/24	PR07 SFY25 05/01/24-06/14/24
EM	35 Hours @ \$270 = \$9,450	25 Hours @ \$270 = \$6,750
LPM	35 Hours @ \$215 = \$7,525	25 Hours @ \$215 = \$5,375
LMPM	200 Hours @ \$205 = \$41,000	160 Hours @ \$205 = \$32,800
GPM	3,021 @ \$180 = \$543,780	2,107 Hours @ \$180 = \$379,260
SS	1,070 @ \$80 = \$85,600	665 Hours @ \$80 = \$53,200
	Total: \$687,355	Total: \$477,385
		Grand Total : \$1,164,740






STATE OF WEST VIRGINIA  
DEPARTMENT OF HUMAN SERVICES  
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.  
Cabinet Secretary

Cynthia Beane  
Commissioner

DATE: January 22, 2024

TO: Crystal Husted  
Senior Buyer  
State of West Virginia Purchasing Division

FROM: Althea Greenhowe   
Procurement Specialist, Senior  
Office of Shared Administration

RE: PF1363932, CDO BMS24\*23  
Dept 0511

The West Virginia Bureau for Medical Services (BMS) respectfully requests approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil, & Parker under PF785940, CMA HHR 21\*03.

The MCES Procurement Assistance project will also aid the State in meeting several of its identified MITA-specific goals, such as: Improve the State's effectiveness and efficiency. Improve operational efficiency and reduce costs in healthcare system. Promote an environment that supports flexibility, adaptability, and rapid response to changes in programs and technology. Promote an enterprise view that supports enabling technologies that align with Medicaid business processes and technologies. Improve the management of member and provider data so that it is timely, accurate, usable, and easily accessible to support analysis and decision-making for healthcare management and program administration. The services period 02/14/2024 – 06/14/2024. The total cost of the invoice is \$1,164,740.00.

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-3924 or [althea.m.greenhowe@wv.gov](mailto:althea.m.greenhowe@wv.gov). Thank you for your time and consideration in this matter.



## Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

Any Words <sup>i</sup>

All Words <sup>i</sup>

Exact Phrase <sup>i</sup>

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc" ×

Entity ∨

Location ∨

Status ∧

Active

Inactive

Reset 



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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

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### BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC   Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit				

Organization Information									
<b>Business Purpose</b>	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Technical Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)			<b>Capital Stock</b>					
<b>Charter County</b>	Kanawha			<b>Control Number</b>	0				
<b>Charter State</b>	ME			<b>Excess Acres</b>					
<b>At Will Term</b>	A			<b>Member Managed</b>	MBR				
<b>At Will Term Years</b>	<b>Par Value</b>								

**Authorized  
Shares**

**Young  
Entrepreneur**

Not Specified

**Addresses**

Type

Address

**Designated Office  
Address**

209 WEST WASHINGTON STREET  
CHARLESTON, WV, 25302

**Mailing Address**

2211 CONGRESS STREET  
PORTLAND, ME, 04102  
USA

**Notice of Process  
Address**

CORPORATION SERVICE COMPANY  
209 WEST WASHINGTON STREET  
CHARLESTON, WV, 25302

**Principal Office  
Address**

2211 CONGRESS STREET  
PORTLAND, ME, 04102  
USA

Type

Address

**Officers**

Type

Name/Address

**Member**

CHARLES K. LEADBETTER III  
2211 CONGRESS STREET  
PORTLAND, ME, 04102

**Member**

DAVID A. ERB, C.P.A.  
2211 CONGRESS STREET  
PORTLAND, ME, 04102

**Member**

SARAH BELLIVEAU, C.P.A.  
2211 CONGRESS STREET  
PORTLAND, ME, 04102

**Member**

KATHY PARKER, C.P.A.  
2211 CONGRESS STREET  
PORTLAND, ME, 04102

Type

Name/Address

**DBA**

DBA Name

Description

Effective Date

Termination

BERRY DUNN

TRADENAME

3/21/2011

BERRY, DUNN, MCNEIL & PARKER,  
PLLC

TRADENAME

11/5/2019

**DBA Name**

**Description**

**Effective Date**

**Termination Date**

## Annual Reports

**Filed For**

2023

2022

2021

2020

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2015

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2012

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For more information, please contact the Secretary of State's Office at 304-558-8000.

Monday, February 12, 2024 — 10:12 AM

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