



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

# State of West Virginia Delivery Order

Order Date: 05-21-2024

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

Order Number:	CDO 0511 2680 BMS2400000041 1	Procurement Folder:	1427253
Document Name:	Partnership Management Project Phase II	Reason for Modification:	
Document Description:	Partnership Management Project Phase II		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST  PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Lakendra R Burdette Requestor Phone: 304-352-4319 Requestor Email: lakendra.burdette@wv.gov  <b>24</b> FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount:	\$894,410.00
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Purchasing Division's File Copy

CH 4/3/24  
PURCHASING DIVISION AUTHORIZATION  
DATE: 4/4/24  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION  
DATE: 6-5-24  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Partnership Management Project Phase II

Dates of Service: 06/15/2024 - 06/14/2025

Total: \$894,410.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$27,950.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-15	2025-06-14				

**Commodity Line Description:** Lead Project Manager: Optional Renewal Year One**Extended Description:**

Lead Project Manager: Optional Renewal Year One

Hourly Rate: \$215.00

Nicole Becnel 130 hours @ \$215 = \$27,950.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$35,100.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-15	2025-06-14				

**Commodity Line Description:** Engagement Manager: Optional Renewal Year One**Extended Description:**

Engagement Manager: Optional Year One

Hourly Rate: \$270.00

Shea Berry-Brennan 130 hours @ \$270 = \$35,100.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$12,300.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-15	2025-06-14				

**Commodity Line Description:** Lead MMIS Project Manager: Optional Renewal Year One**Extended Description:**

Lead MMIS Project Manager: Optional Renewal Year One

Hourly Rate: \$205.00

Emily McCoy 60 hours @ \$205 = \$12,300.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$701,460.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

**Commodity Line Description:** General Project Manager: Optional Renewal Year One

**Extended Description:**

General Project Manager: Optional Renewal Year One

Hourly Rate: \$180.00

Peter Alfrey 60 hours @ 180 = \$10,800  
Dawn Webb 260 hours @ 180 = \$46,800  
Amber Davis 1,080 hours @ 180 = \$194,400  
Ethan Wiley 850 hours @ 180 = \$153,000  
Shardae Bunche 450 hours @ 180 = \$81,000  
Ebony Carter 450 hours @ 180 = \$81,000  
Nycole Washington 347 hours @ 180 = \$62,460  
Sarah Renner 400 hours @ 180 = \$72,000

Total: 3,897 hours @ \$180 = \$701,460.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$117,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

**Commodity Line Description:** Project Management Support Staff: Optional Renewal Year One

**Extended Description:**

Project Management Support Staff: Optional Renewal Year One

Hourly Rate: \$80.00

Nolan Cyr 450 hours @ 80 = \$36,000  
Hailey Holden 60 hours @ 80 = \$4,800  
Megan Blount 50 hours @ 80 = \$4,000  
Katie McDonald 400 hours @ 80 = \$32,000  
Alycia Minshall 50 hours @ 80 = \$4,000  
Caitlin Cabral 50 hours @ 80 = \$4,000  
Carol Ann Guay 50 hours @ 80 = \$4,000  
Emily Hendrickson 50 hours @ 80 = \$4,000  
Janine DiLorenzo 50 hours @ 80 = \$4,000  
Jon Williams 50 hours @ 80 = \$4,000  
Jordan Ramsey 50 hours @ 80 = \$4,000  
Megan Hamilton 50 hours @ 80 = \$4,000  
KD Dobyne 50 hours @ 80 = \$4,000  
Cate Poling 60 hours @ 80 = \$4,800

Total: 1,470 hours @ \$80 = \$117,600.00

May 1, 2024

To Whom It May Concern:

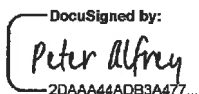
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services by providing support for the Partnership Management Phase II Project under our master contract (CMA # HHR21\*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2024.

Assuming a start date of June 15, 2024, the work would then conclude on June 14, 2025.


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:  
  
2DAAA44ADB3A477...

Peter Alfrey  
Principal  
207-541-2242

Ok  




West Virginia Department of  
Human Services (DoHS) Bureau  
for Medical Services (BMS)

Partnership Management Project Phase II

**Staffing Plan and Scope of Work**

Prepared for Centralized Master Agreement (CMA) #HHR21\*03

**Submitted by:**

BerryDunn  
300 Capital Street  
Charleston, WV 25301  
681-313-8905

**Nicole Becnel PMP®, Principal**

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**Shea Berry-Brennan, Principal**

[sberry-brennan@berrydunn.com](mailto:sberry-brennan@berrydunn.com)

**Peter Alfrey, Principal**

[PAlfrey@berrydunn.com](mailto:PAlfrey@berrydunn.com)

**Submitted On:**

May 1, 2024

## **Staffing Plan and Scope of Work (SOW) for the West Virginia (State) Department of Human Services (DoHS) Bureau for Medical Services (BMS) Partnership Management Project Phase II**

This SOW describes the tasks BerryDunn will perform to assist BMS with Leverage and Reuse initiatives. The work completed under the Partnership Management Project Phase II will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21\*03 BMS Project Management Services contract between BerryDunn and the State DoHS.

### 1.0 Introduction

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

#### 1.1 Key Information

The objective of this project is to continue to support the BMS with incorporating the State's Leverage and Reuse activities to Medicaid agencies of other states and territories through the following activities:

- Assisting in facilitation of multistate forums
- Supporting technical advisory activities
- Offering Medicaid program management guidance
- Supporting BMS in efforts related to sharing of systems, modules, code, contracts, and developed artifacts

The Partnership Management Project Phase II SOW aims to:

- Reduce risk during development, implementation, maintenance, and operations of business processes and systems
- Lower implementation and operations costs
- Accelerate development and implementation timelines
- Improve the overall quality and maturity of the Medicaid Enterprise System (MES)

The Partnership Management Project Phase II will also aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Gen 1.0 – Improve BMS effectiveness and efficiency
- Gen 3.0 – Leverage technology to enhance performance and decision-making

- Gen 5.0 – Help ensure program quality
- Operations Management (OM) 1.0 – Improve operational efficiency and reduce costs in the healthcare system
- OM 2.0 – GOAL – Improve access to information necessary for OM
- Performance Management (PE) 1.0 – Improve effectiveness and efficiency of PE function

## 1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- This work will begin upon approval of this SOW and a mutually agreed-upon date. BerryDunn will provide a separate letter acknowledging approval of the start date once the SOW approval date is known. BerryDunn estimates completion of this work within 13 months of project initiation.
- The State leadership team will consist of Sarah Young, Deputy Commissioner, as project sponsor and Brandon Lewis, Director Office of Enterprise Systems, as project lead.
- BMS key staff will be available to participate, when necessary, throughout this project, including, but not limited to, weekly team meetings, ad hoc meetings, etc.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- Shea Berry-Brennan will provide engagement oversight on this project, Nicole Becnel will provide as Lead Project Management services, and Amber Davis will provide Project Management services.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the State project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The estimated number of hours reflected in this SOW for the Leverage and Reuse Initiatives include assistance for up to two State partnerships.
- BerryDunn and the State will explore strengthening State partnerships with other states and territories [such as the United States Virgin Islands (USVI)] and leverage any needed tools and procedures when applicable.

## 1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) for the purposes of this SOW. The Centers

for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 27, 2024, for total State and federal funds in the amount of \$25,284,316, under project identifier WV-2024-01-08-MMIS-IAPDU-MITA. The estimated cost of the services delivered under this SOW is \$894,410 (included in the approved Advance Planning Document [APD]). Therefore, any scope that is added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.



## 2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members regularly to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>D01: Commissioner Briefing</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Shea Berry-Brennan</p> <p>Nicole Becnel</p> <p>Emily McCoy</p> <p>Dawn Webb</p> <p>Amber Davis</p>	260
2.0	<p><b>Project Execution and Control</b></p> <p><i>Assumptions</i></p> <p>The services described in this section will be performed concurrently with those described in Sections 3.0, 4.0, 5.0, and 6.0.</p> <p><i>Service Approach</i></p> <ol style="list-style-type: none"> <li>Provide project management services for partnership management activities, and documentation, as well as other activities related to partnership management (as requested). <ol style="list-style-type: none"> <li>Additional project documentation will be developed and maintained including, but not limited to meeting documentation, action item tracking logs, decision logs, risk and issues logs, and project timeline.</li> </ol> </li> <li>Provide project management services for</li> </ol>	<p>Shea Berry-Brennan</p> <p>Nicole Becnel</p> <p>Emily McCoy</p> <p>Peter Alfrey</p> <p>Dawn Webb</p> <p>Amber Davis</p> <p>Ethan Wiley</p> <p>Shardae Bunche</p> <p>Ebony Carter</p> <p>Nycole Washington</p> <p>Sarah Renner</p> <p>Nolan Cyr</p> <p>Hailey Holden</p>	1,200

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>leverage and reuse initiatives. This includes, but is not limited to, the following:</p> <ol style="list-style-type: none"> <li>Provide status updates (as requested).</li> <li>Coordinate and facilitate leverage and reuse project team meetings (as requested).</li> <li>Manage project action items, decisions, risks, and issues.</li> <li>Provide senior-level subject matter expertise.</li> </ol> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> <li>D02 Monthly Status Report</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon successful completion of the project and acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Megan Blount Katie McDonald Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne Cate Poling</p>	
3.0	<p><b>Leverage and Reuse</b></p> <p><i>Assumptions</i></p> <p>BerryDunn will support the State with facilitation and documentation to leverage and reuse the State's existing functionality. This includes support for up to two State partnerships and initial support for new opportunities.</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources with relevant expertise to assist BMS with facilitating, planning, and designing two State partnerships and initial support for additional partnerships. BerryDunn will continue updating the Leverage and Reuse Opportunities Repository, as requested.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Leverage and Reuse complete upon successful completion of the project and acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Shea Berry-Brennan Nicole Becnel Emily McCoy Peter Alfrey Dawn Webb Amber Davis Ethan Wiley Shardae Bunche Ebony Carter Nycole Washington Sarah Renner Nolan Cyr Hailey Holden Megan Blount Katie McDonald Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams</p>	1,372

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Jordan Ramsey Megan Hamilton KD Dobyne Cate Poling	
4.0	<p><b>APD Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will support the State in developing an APD or Advanced Planning Document Update (APD-U) to help secure federal funding necessary for the partnership initiatives.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> <li>D03: APD (as needed)</li> <li>D04: APD-U (as needed)</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem APD Support complete upon successful completion of the project and acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Emily McCoy Peter Alfrey Dawn Webb Amber Davis Katie McDonald</p>	1,350
5.0	<p><b>Sub-Project Management Services</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will leverage processes previously executed on the engagement and work with the BMS Project Sponsor and Leads to define a process by which Partnership Management sub-projects can be defined and initiated. The process for requesting and approving these sub-projects will include a review and approval process by the Project Sponsor and/or key BMS stakeholder(s).</p> <p>BerryDunn will conduct a high-level requirements analysis and project strategic planning for initiatives BMS identifies.</p> <p>BerryDunn may also assist with other limited tasks related to the implementation of BMS projects, as defined by the Project Sponsor(s). BerryDunn assumes the initiation of up to three projects.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Sub-Project Management Services complete upon successful completion of the project and acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Shea Berry-Brennan Nicole Becnel Emily McCoy Peter Alfrey Dawn Webb Amber Davis Ethan Wiley Shardae Bunche Ebony Carter Nycole Washington Sarah Renner Nolan Cyr Hailey Holden Megan Blount Katie McDonald Alycia Minshall Caitlin Cabral Carole Ann Guay</p>	1,450

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne Cate Poling	
6.0	<p><b>Project Closeout</b></p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables that BerryDunn will transfer to the State at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>D05: Project Closeout Summary</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Closeout Summary complete upon successful completion of the project and acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	Dawn Webb Amber Davis Katie McDonald	55
Total Hours			5,687
Total Not-To-Exceed Cost Estimate			\$894,410

### 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 Optional Year 1 in CMA HHR21\*03 BMS.

The following rates were used to compute the costs in the table:

- CL 9: Engagement Manager (EM) (\$270/hour)
- CL 8: Lead Project Manager (LPM) (\$215/hour)
- CL 10: Lead MMIS Project Manager (LMPM) (\$205/hour)
- CL 11: General Project Manager (GPM) (\$180/hour)
- CL 12: Support Staff (SS) (\$80/hour)

**Table 2: Project Resources – With Estimated Hours and Total Cost**

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Shea Berry-Brennan	130	\$35,100
8	LPM	\$215	Nicole Becnel	130	\$27,950
10	LMPM	\$205	Emily McCoy	60	\$12,300
11	GPM	\$180	Peter Alfrey	60	\$10,800
11	GPM	\$180	Dawn Webb	260	\$46,800
11	GPM	\$180	Amber Davis	1,080	\$194,400
11	GPM	\$180	Ethan Wiley	850	\$153,000
11	GPM	\$180	Shardae Bunche	450	\$81,000
11	GPM	\$180	Ebony Carter	450	\$81,000
11	GPM	\$180	Nycole Washington	347	\$62,460
11	GPM	\$180	Sarah Renner	400	\$72,000
12	SS	\$80	Nolan Cyr	450	\$36,000
12	SS	\$80	Hailey Holden	60	\$4,800
12	SS	\$80	Megan Blount	50	\$4,000
12	SS	\$80	Katie McDonald	400	\$32,000
12	SS	\$80	Alycia Minshall	50	\$4,000
12	SS	\$80	Caitlin Cabral	50	\$4,000
12	SS	\$80	Carole Ann Guay	50	\$4,000
12	SS	\$80	Emily Hendrickson	50	\$4,000
12	SS	\$80	Janine DiLorenzo	50	\$4,000

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Jon Williams	50	\$4,000
12	SS	\$80	Jordan Ramsey	50	\$4,000
12	SS	\$80	Megan Hamilton	50	\$4,000
12	SS	\$80	KD Dobyne	50	\$4,000
12	SS	\$80	Cate Poling	60	\$4,800
<b>Total</b>				<b>5,687</b>	<b>\$894,410</b>

## 4.0 Project Hours and Costs per Month

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

**Table 3: Project Costs by Month**

Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	10	10	6	321	120	467	\$73,460
Month 2	10	10	6	321	120	467	\$73,460
Month 3	10	10	6	316	115	457	\$72,160
Month 4	10	10	6	316	115	457	\$72,160
Month 5	10	10	4	314	115	453	\$71,390
Month 6	10	10	4	314	106	444	\$70,670
Month 7	10	10	4	314	106	444	\$70,670
Month 8	10	10	4	314	115	453	\$71,390
Month 9	10	10	4	306	113	443	\$69,790
Month 10	10	10	4	269	113	406	\$63,130
Month 11	10	10	4	269	113	406	\$63,130
Month 12	10	10	4	269	112	405	\$63,050
Month 13	10	10	4	254	107	385	\$59,950
<b>Total</b>	<b>130</b>	<b>130</b>	<b>60</b>	<b>3,897</b>	<b>1,470</b>	<b>5,687</b>	<b>\$894,410</b>

# 5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

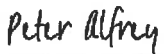
Task	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 Leverage and Reuse													
4.0 APD Support													
5.0 Sub-Project Management Services													
6.0 Project Closeout													





**BerryDunn Authorized Signature**

As a principal of this firm in our Government Consulting Team, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to 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:  
  
2DAAA44ADB3A477...

5/1/2024

Signature

Date

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



Signature

5/8/24

Date



## Appendix A: Resumes

### Shea Berry-Brennan, MBA, PMP®, CCP

<b>Proposed Project Role:</b>	Engagement Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	11 years
<b>Certifications and Education:</b>	Master of Business Administration, University of Charleston Bachelor of Science in English, The Ohio State University Project Management Institute (PMI®) Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP) Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II) Certified MBTI Practitioner

#### Overview

Shea is a principal on BerryDunn's Consulting Services Team, focused on providing project management support, research, and analysis services. Shea has over 10 years of project management experience, including experience working with State agencies on Independent Verification & Validation (IV&V), project management, strategic planning, organizational development, and procurement assistance projects. Shea has Medicaid experience developing her subject matter expertise in the following areas: organizational development and training, Centers for Medicare & Medicaid Services (CMS) certification, modular procurements, Medicaid Enterprise Systems modernization, provider management, care management, security management, and utilization management.

#### Experience

##### BerryDunn (05/2013 – present)

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Program Manager – Provider Management Program (06/2018 – 06/2019)*

- *Provider Enrollment (PEA) Year 2 Project*

- *Access to Care Monitoring*

- *Provider Incentive Payment (PIP) Audit Year 7 Project*

- *PEA Project (08/2014 – 12/2016)*

Shea was the Project Manager on the PEA Project and responsible for maintaining and monitoring the project risks and issues log, project issue escalation process, and prove overall health status.



- *Project Management of MMIS Procurement, DDI, and Certification (08/2013 – 12/2015)*

Shea served as the project management lead on the Bureau's MMIS implementation. She maintained the project risk and issue log and oversaw the process by which they were escalated to the client. She was also a liaison 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 was also responsible for analyzing Vendor deliverables aligned with her tracks to help ensure the correct project documentation has been provided and is available for future use.

#### **WV Department of Human Services (DoHS)**

- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 – 05/2016)*

Shea served as the project lead for the DoHS Office of Management and Information Services' (MIS') eligibility and enrollment Vendor transition project. WV had a condensed time to transition the maintenance and operations of its 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 – 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 WV 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.

- **Hawai'i Department of Human Services MedQuest Division (MQD)**

- *Organizational and Business Process Redesign (10/2019 – present)*

Shea is currently serving in the role of Project Manager for a Business Process Redesign effort for the customer-facing sections of Hawai'i's eligibility department,



MQD. Her work includes identifying opportunities for Hawai'i to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience. Shea supports the continued MQD organizational redesign efforts by focusing on the development and implementation of a leadership development program and providing organizational support and guidance, focused on process efficiency, where she recently led a review of the current system business process and provided recommendations for lean improvements. Before becoming PM, Shea also served as an IT Project Strategist, where she provided assessments and support in strategic planning of the current business models, providing recommendations for IT improvements. Shea also supports the development of training materials for the eligibility staff, which are being created by BerryDunn's team, most recently including an extensive AVS training.

Additionally, 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; and supporting the development of an effective leadership team prepared to guide their teams through change, including offering strategic change management services. Shea also participates in 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; and managing Hawai'i's AVS system implementation, including Vendor management and conflict resolution between multiple service vendors (for AVS and the eligibility system).

- **Missouri Office of Administration Information Technology Services Division**

- *State Medicaid IT Assessment Project (07/2019 – 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. BerryDunn will develop a recommended future IT Governance Model. Shea is also responsible for managing all resources, the budget, all deliverables, service level agreements, and risks and issues.

- **Alaska Division of Health Care Services (HCS)**

- *MMIS Fiscal Agent Solicitation Consultant Services (09/2020 – 02/2021)*

The BerryDunn team assisted 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 provided multiple future strategic MES modernization options.

- **Massachusetts Health Insurance Exchange and Integrated Eligibility System (HIX/IES) Entities**

- *IV&V Services (10/2018 – 09/2019)*

BerryDunn provided IV&V Services for implementation of the Massachusetts HIX/IES. Shea served as the temporary Project Manager for BerryDunn's IV&V engagement, overseeing project work and activities. Services included deliverable reviews; verification and validation of automated code review and continuous integration results; cost allocation and financial status reports; review of expected and delivered reusability; independent assessment of implementation readiness; and issue and risk management.

- **New Hampshire Department of Health and Human Services (DHHS)**

- *MMIS and Fiscal Agent Services Assessment and Strategy Project (03/2018 – 09/2018)*

Shea served as the lead senior consultant on the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, she led a team that assessed the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards, and developed potential MMIS re-procurement options. Additionally, Shea led the deliverable's development for this project, including the final assessment and options report, which included a SWOT analysis and a strategic assessment of the current Medicaid landscape, focusing on significant advancements in new Medicaid enterprise systems and the move to updated approaches and strategies for MMIS procurement.

- **Ohio Department of Medicaid (ODM)**

- *Ohio Medicaid Enterprise System (OMES) IV&V Services (12/2016 – 02/2018)*

Shea served as the CMS certification lead on the BerryDunn team providing IV&V Services to ODM on their new modular MMIS procurement project. She managed CMS communications, focused on client relations, and led the IV&V team's certification process. Additionally, Shea helped provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program.

**CIMCO Building Services (06/2012 – 08/2013)**

Shea focused on strengthening the company's ties to their clients by performing site visits, carefully watching safety compliance, and helping to ensure quality work. From March 2013 to August 2013, she focused on project management by reviewing cost and inflation, performing quality checks, managing risks, and controlling project deadlines. In this position, she obtained extensive project management experience.



Before moving to her project management position, Shea worked as a service coordinator, focusing on dispatch, billing, drafting letters, QA, and recruiting new work. In this position, she learned many skills pertaining to interacting with clients and project coordination.



## Nicole Becnel, 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 Arts in Speech and Hearing Science, University of South Florida Certified Project Management Professional (PMP®) Executive Coaching Certification®

### Overview

Nicole brings valuable expertise in her field as a qualified Medicaid IT professional with over 20 years of experience in health and human services project management experience. Her breadth of knowledge includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia (WV) overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

### Experience

#### BerryDunn (06/2010 – present)

Nicole works with BerryDunn's Medicaid Practice Group. Nicole has been expertly providing valuable project oversight and coordination while helping to establish and maintain engaging and productive client and vendor relationships for WV projects and initiatives for over a decade. Project highlights include:

- **State of WV**
  - *Lead Manager (2012 – present)*
    - *MCO ORR Assistance (09/2020 – 12/2020)*
    - *MMIS Fee Schedule and Edit Quality Review Project: Phase III (06/2020 – 11/2020)*
    - *MHT MCO Procurement Assistance Project: Phase II (05/2020 – 09/2020)*
    - *SUD Waiver Initiative Phase 4 (04/2020 – 05/2021)*
    - *MHP Implementation (Coordinated Care Management) (03/2020 – 06/2020)*
    - *MCO Transition: Phase II (03/2020 – 02/2021)*
    - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
    - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 – 04/2021)*
    - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 – 05/2020)*
    - *WVCHIP MCO Transition Planning (01/2019 – 07/2019)*



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





### **WV Department of Human Services (DoHS)**

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – 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 implementation of a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.
- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*  
Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*  
Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 – present)*  
Nicole is the Lead Project Manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped WV secure



and maintain millions of dollars in federal funding.

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*  
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV 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 – 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 (FC) and adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.
- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 – 10/2020)*  
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and prepared 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 – 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 increased quality of care and health outcomes as well as data quality and efficiency for the State's managed care populations.

- *Provider Management Support (07/2019 – 01/2021)*  
Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multistate collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*  
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*  
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 – 09/2013)*  
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS.



Her work on the project included oversight of contract start-up activities and system design sessions.

- *Provider Enrollment (PEA) Project (07/2011 – 12/2012)*

Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare 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 – 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 planning assistance, operational readiness assessment assistance, and post-implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 – 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.

- **New Jersey Division of Medical Assistance and Health Services**

- *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 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.

**Molina (formerly Unisys MMIS Operations) (09/2001 – 06/2010)**

- *Project Manager for MIHMS Provider Enrollment*

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



- *WV 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, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

- *Contract Configuration and Reports Lead for WV MMIS*

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

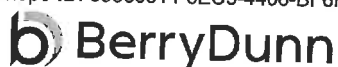
- *Project Management Support*

Nicole served in a project management support services role for State Medicaid initiatives, including the Kentucky MMIS DDI project. Her work involved schedule management, action item management, training support, provider development, and UAT planning. She also helped ensure the appropriate project organization processes were closely followed.

### **Presentations**

"Modularity GPS: Defining the Road map and Understanding the Landscape," Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 08/16/2016.

"Managing in a Modular MMIS Implementation," Presentation for MESC 2014, 08/21/2014.


**Emily E. McCoy, RN, BSN, PMP®**

<b>Proposed Project Role:</b>	Lead MMIS 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 Nursing, Marshall University Registered Nurse Project Management Institute (PMI®) Certified Project Management Professional (PMP®) Certified Executive Coach

**Overview**

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

**Experience**
**BerryDunn (07/2016 – present)**

Emily serves as a senior manager in BerryDunn's Medicaid Practice Group (MPG), bringing her years of experience to state Medicaid agency clients, particularly in Centers for Medicare & Medicaid Services (CMS) certification.

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Eligibility and Enrollment Implementation Assistance (01/2018 – present)*  
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily can combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
    - *Public Health Emergency (PHE) (10/2021 – 7/2022)*  
Emily served as a subject matter expert (SME) for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with unwinding efforts 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 – 10/2021)*  
Emily served 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 DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
  - *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*  
Emily served as the project manager for the West Virginia DoHS 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 DoHS 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 (DMAHS)**
  - *MMIS Modernization (7/2022 – 12/2023)*  
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
  - *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 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 – 04/2017)*  
Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements



development, RFP development, and system selection.

#### **West Virginia DoHS (11/2013 – 06/2016)**

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

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

#### **West Virginia Bureau for Medical Services (BMS) (01/2003 – 10/2013)**

During her 10 years with BMS, Emily held several positions, as described below.

- *Medicaid Management Information system (MMIS) (01/2007 – 10/2013)*  
Emily served as the manager of operations with the MMIS for WV with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including long-term care and hospice services.
- *Office of Behavioral and Alternative Health Care (01/2005 – 12/2006)*  
Emily served as Program Manager of the State Medicaid Long-Term Care Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, Pre-Admission Screening and Resident Review (PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.
- *Office of Behavioral and Alternative Health Care (01/2003 – 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 – 12/2002)**

- *Transitional Care Unit (05/1999 – 12/2002)*
  - *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 – 05/1999)*  
As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:
  - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
  - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
  - Serving as a representative on the Standards and Practice Council and Procedures sub-committee
  - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
  - Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients
- *Behavioral Health Unit (07/1996 – 01/1998)*  
Emily began her nursing career on the Behavioral Health Unit. Overall duties involved advocacy of patients while providing direct patient care to individuals with mental illness.


**Peter Alfrey, MBA, MA, PMP®, 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>	17 years
<b>Certifications and Education:</b>	Master of Business Administration, Organizational Management, Husson University Master of Arts in History, Providence College Bachelor of Arts in Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP) Lean Six Sigma Green Belt Certification

**Overview**

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing portfolio and 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 General Project Manager for the West Virginia (WV) Department of Human Services (DoHS) Bureau for Medical Services (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 – present)**

Peter is a principal and project manager supporting WV DoHS and BMS, performing duties that include, but are not limited to coordinating communications across the BerryDunn portfolio management office, helping ensure resolution of project-related issues, and disseminating necessary information to the project team(s) and escalating appropriately to the engagement's portfolio manager, and/or program managers.

- **State of WV**

- **WV DoHS, BMS, and West Virginia Children's Health Insurance Program (CHIP)**

- *Portfolio Manager – West Virginia Engagement: Portfolio Management Office (09/2018 – present)*

Peter provides strategic direction for BerryDunn's WV engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include:

- *Mountain Health Trust (MHT) Phase II (12/2023 – present)*



- *Incident and Case Management System (ICMS) Procurement Assistance (02/2023 – present)*
  - *Public Health Emergency (PHE) Support (12/2021 – present)*
  - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 – present)*
  - *Data Improvement Project—Phases I, II and III (09/2019 – present)*
  - *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 – present)*
  - *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I, II and III (10/2020 – 10/2023)*
  - *MCO Encounter Data Quality—Phases I and II (06/2020 – 02/2022)*
  - *Mental Health Parity and Behavioral Health Services Support (05/2020 – 09/2022)*
  - *Contact Tracing (04/2020 – 09/2022)*
  - *MHT MCO Procurement Assistance Project Phases I and II (06/2019 – 06/2021), and Mountain Re-Procurement (03/2020 – 08/2022)*
  - *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise Implementation Project Management Support and Operational Readiness Review (02/2019 – 06/2020) and MHP Re-Procurement (10/2021 – 09/2022)*
  - *WVCHIP Operational Readiness Review (09/2020 – 01/2021)*
  - *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 – present)*
  - *WVCHIP Out-of-Pocket Maximum (05/2021 – present)*
  - *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 – 11/2019)*
  - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – 03/2019)*
  - *Asset Verification System Project Management Services and Procurement Assistance (04/2017 – 02/2018)*
  - *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 – 12/2016)*
- **Washington Health Care Authority (HCA)**
    - *Public Health Emergency Unwind Project (03/2023 – 12/2023)*  
Peter served as Engagement Manager for the project, helping support the HCA's PHE unwinding efforts by overseeing the BerryDunn project team's project deliverables and reporting, supporting coordination of Washington inter-agency meetings and information sharing, and providing stakeholder management services.
- **New Jersey Division of Medical Assistance and Health Services**
    - *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 08/2017)*



Peter supported testing efforts for New Jersey MMIS implementation in areas such as Systems Integration Testing (SIT) test case and results review, SIT test case analysis, User Acceptance Testing (UAT) support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the WV MMIS procurement in 2015.

- **Vermont Green Mountain Care Board (GMCB)**

- *Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 – 09/2014)*

Peter led the efforts to help the GMCB build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.

- **Maryland Health Benefit Exchange (HBE)**

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

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

### **Martin's Point Health Care (12/2008 – 02/2014)**

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

### **Health Dialog (07/2006 – 11/2008)**

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multifaceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for



company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.


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

<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>	Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University Associate in Applied Science, Office Administration, West Virginia University Certified Project Management Professional (PMP®) Prosci® Certified Change Practitioner (CCP®) Certified Professional Coder, American Academy of Professional Coders Certified Outpatient Coder, American Academy of Professional Coders Lean Six Sigma Green Belt (LSSGB) Certification

**Overview**

Dawn is a manager in BerryDunn's Medicaid Practice Group, 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 – present)**

Dawn works with state Medicaid agency clients and currently serves on the project team based in Charleston, West Virginia.

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Quality Improvement Initiatives Portfolio Management (05/2019 – present)*

As quality improvement initiatives portfolio manager, Dawn provides project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, Payment Error Rate Measurement (PERM), and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)*
      - *Data Improvement Project (09/2019 – present)*
      - *Public Health Emergency (PHE) Support (12/2021 – present)*
      - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)*



- *Provider Management Support (11/2019 – present)*
- *State Plan Review and Support (SPRS) (02/2020 – present)*
- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)*
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)*
- *Advanced Planning Document (APD) Assistance (05/2018 – present)*  
Dawn currently manages the BerryDunn team for the WV engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as needed updates to 10 established APDs.
- *Payment Error Rate Measurement (PERM) Project (05/2018 – present)*  
Dawn serves as the project manager for the PERM project, managing budgets and project deliverables and working closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.
- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*  
Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.
- *TPL Procurement (05/2019 – 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 MedQUEST Division (MQD)**
  - *Medicaid Organizational and Business Process Redesign (11/2021 – 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 – 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 – 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 – 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 front-line staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergrity. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

**Unisys (06/2004 – 11/2009)**

As a domain services analyst, Dawn served as the configuration team leader and a medical coder for the WV Medicaid line of business. Dawn was a liaison for the MMIS configuration team and the WV BMS leadership.

**Charleston Area Medical Center (08/2004 – 09/2004)**

As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department.

**West Virginia University (WVU) Physicians of Charleston (06/2001 – 06/2004)**

While with WVU, Dawn worked as a senior billing specialist and a billing manager, serving the Department of Internal Medicine and the Department of Obstetrics and Gynecology.

**Garnet Career Center (02/1999 – 01/2000)**

Dawn worked as a medical coding instructor for the career center.





**University Health Associates (09/1996 – 07/2001)**

Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

**Acordia National (12/1994 – 05/1996)**

Dawn began her career as a claims examiner.



## Amber Davis, CCP

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	<p>Bachelor of Arts in Criminology, Indiana University of Pennsylvania</p> <p>Non-profit Management Certification, Butler County Community College</p> <p>Incident Management Certified Investigator, The Commonwealth of PA, Office of Developmental Programming (CI)</p> <p>Certified Community Health Worker (CCHW), Pennsylvania Certification Board</p> <p>Prosci® Certified Change Management Practitioner (CCP)</p> <p>Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)</p> <p>Licensed Real Estate Agent, Pennsylvania Department of State, Real Estate Commission</p>

### Overview

Amber is an experienced senior director and Medicaid Health and Human Services subject matter expert (SME) with a proven history of promoting positive and successful business processes and relationships, leading to successful project outcomes. Amber's knowledge and dedication are reflected in her commitment to promote leadership through motivation and intention. She specializes in organizational growth, conflict resolution, effective management, quality assurance, public speaking, innovation, and government relations.

### Experience

#### BerryDunn (09/2022 – present)

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Partnership Management (PM) Project and Provider Management Support (12/2023 – present)*

Amber provides project management support for the partnership management work provided between WV and partnering States and Territories. Amber facilitates team meetings internally and externally and manages the project budget. Additionally, she provides support with vendor meetings, vendor change request needs and scope of work approvals and reviewing project resources to help ensure leverage and reuse items are completed timely. Amber functions as a



liaison between the partnering States and Territories, facilitating the monthly Multistate Forum and managing the participants' communication between sessions.

- *Advance Planning Document Consulting (APD) Project (05/2023 – present)*  
Amber serves as the project manager for the APD consulting project. In this role, Amber tracks the progress and development of multiple APD documents and the submissions to Centers for Medicare & Medicaid Services (CMS), in support of funding for new and ongoing projects. She communicates with the State, reviews documents, facilitates team meetings internally and externally, and manages budgets, timelines, change request needs, and project resources to help ensure the project remains compliant with contract deliverables.
- *Enrollment (PEA) Project and Provider Management Support (09/2022 – 10/2023)*  
Amber provided project management support for the Provider Enrollment project, responsible for managing project deliverables and resources. She also managed the partnership between WV and the U.S. Virgin Island, working on leverage and reuse initiatives.
- *Electronic Visit Verification (EVV) Solution Implementation Project (09/2022 – 06/2023)*  
As the project manager, Amber was responsible for managing project deliverables, and working closely with the client to help ensure contract requirements and expectations were fully met.

**New Jersey Department of Division of Medical Assistance & Health Services (DMAHS)**  
*Provider Management Module (08/2023 – present)*

Amber functions as a SME, providing specialized knowledge and expertise to the State as relates to Provider Enrollment. She supports the Provider Modernization Business Process Mapping (BPM) and created a project tracking document to highlight areas of focus, regulation references and workstream.

**Colorado Office of the State Auditor (OSA)**

*Colorado Department of Health Care Policy & Financing (HCPF)'s Recovery Audit Contractor (RAC) Program (08/2023 – present)*

Amber serves as a Medicaid project SME, providing research assistance to evaluate the design and operation of HCPF RAC program for compliance with applicable federal requirements. She has focused on the differentiation of the Colorado RAC programs and policies in comparison to 16 other State Plans. Amber has attended several meetings with State RAC program administrators to identify program specific features.

**Centene Corporation, PA Health&Wellness (10/2021 – 08/2022)**

As Manager of Provider Relations, Amber led the Long-Term Supports and Services (LTSS) provider relations team, covering the Pennsylvania territory. She was responsible for maintaining production and quality standards, external relationships, developing new provider relationships, assisting with contracting activities and was a SME on the CommunityHealth



Choices model. Amber would also monitor activities with providers and team members such as provider on-site visits, credentialing, and orientations.

- **Alliance for Non-profit Resources (10/2012 – 10/2021)**
  - *Senior Director of Operations and Service Development (09/2017 – 10/2021)*  
Amber led \$9.2 million dollars of Medicaid programming and 325+ team members throughout Pennsylvania. She successfully implemented statewide expansion, adding seven regions to daily operations, established \$2.5 million dollars of organizational growth from Brokers, Schools, Managed Care Organizations, Administrative Entities, Commercial and Non-profit businesses, and instilled trust in clients by providing them with transparent communications. She enforced quality assurance and contract obligations as well as acted as an informal publicist to highlight team's best qualities, represented ANR during consultations, State, and county level, and served as a Solutions Engineer.
  - *Director of Operations (06/2015 – 09/2017)*  
Amber spearheaded General Operations in collaboration with the Board, other executives, and staff, while launching the development of regional expansion planning. She shaped relationships and managed agreements with external partners and evaluated and transformed the efficiency of business procedures according to organizational objectives.
  - *Senior Operations Manager (11/2013 – 06/2015)*  
Amber established and carried out departmental/organizational goals, developed programs, policies, and procedures, and oversaw fiscal and budgetary activities.
  - *Operations Manager (10/2012 – 11/2013)*  
Amber analyzed and improved departmental processes, monitored daily operations, quality, productivity and efficiencies, and developed program training standards.


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

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	<p>Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis</p> <p>Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis</p> <p>Bachelor of Arts in Political Science and History, University of Maine at Farmington</p> <p>Project Management Institute (PMI®) Certified Project Management Professional (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP)</p> <p>Certified Lean Six Sigma Green Belt (LSSGB)</p>

**Overview**

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

**Experience**
**BerryDunn (07/2014 – present)**

Ethan has worked across practice areas for BerryDunn's Government Consulting group. Project highlights include the following.

- **State of West Virginia (WV)**
    - **WV Bureau for Medical Services (BMS)**
      - American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (05/2021 – present)
- Serving as program manager and lead, Ethan oversees this project and provides subject matter expertise, and support for the design, development, and



implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for State Medicaid spending on HCBS. The increased FMAP allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for WV. The project continues in the implementation stage where Ethan leads workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *WV Certified Community Behavioral Health Center (CCBHB) Project (07/2021 – present)*

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

- *ARPA Section 9813: Mobile Crisis Grant Project (07/2021 – present)*

Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, 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. Currently the work involves ongoing design and implementation activities.

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

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

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

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



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

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

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

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

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

- *Third-Party Liability (TPL) Options Analysis Project (07/2018 – 12/2018)*  
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led investigated both solution and financing alternatives for the State to conduct their Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.



- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*  
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across WV's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project and oversaw the design and inauguration of seven sub-projects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 – 12/2016; 06/2017 – 12/2017)*  
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a State-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 – 02/2016)*  
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 – 12/2015)*  
As business analyst, Ethan was brought in to organize and complete the final development of a State Medicaid agency project to develop a major RFP to select a utilization management vendor.

#### **WV Bureau for Children and Families**

- *Project Management for Enterprise Content Management (ECM) Project (08/2015 – 02/2016)*  
Ethan served as interim project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple State agencies, and facilitated a smooth implementation.

#### **Minnesota Department of Human Services (DHS)**

- *Program Analysis of Implementation of a PACE Program (09/2023 – present)*  
Ethan currently serves as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversees the development of project deliverables, and directs project work for a team of five. In addition, Ethan serves as primary point of contact with DHS for project management and provides responsibility for quality of all final project deliverables.

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

- *Advance Planning Document (APD) Consulting (05/20221 – present)*





As project manager, Ethan leads a team focused on helping the State of Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.

- **Puerto Rico Department of Health (PRDoH)**

- *State Plan Support – (12/2020 – 10/2021)*

In order to support the Puerto Rico Medicaid Program (PRMP), Ethan served as a Subject Matter Expert for BerryDunn's State Plan work. In this role, Ethan researched and analyzed the Medicaid State Plan, drafted amendments, and reviewed State Plan materials. Ethan's work included analyzing state plan provisions related to Hospital-Based Presumptive Eligibility (HBPE), Modified Adjusted Gross Income (MAGI), and other major eligibility provisions of the State Plan.

- **Nebraska Department of Motor Vehicles**

- *Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 – 02/2017)*

As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current State assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

- **Michigan Department of Education**

- *Early Childhood Data Governance Structure (03/2016 – 06/2016)*

As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

- **Colorado DHS**

- *Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 – 10/2014)*

Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado DHS. As part of this project, he researched and analyzed State policy and vendor solutions and supported analysis of future system costs and impacts.



Services are provided nationwide and the BerryDunn credentialing team works with nearly 300 payers, including Medicare, MCO, Advantage carriers and State Medicaid services in but not limited to Puerto Rico, New Jersey, Iowa and West Virginia.



## Shardae Bunche, MPH, LSSGB

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	<p>Master of Public Health, Florida A&amp;M University Institute of Public Health, Concentration in Health Policy and Management</p> <p>Bachelor of Science in Healthcare Management, Florida A&amp;M University</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p>

### Overview

Shardae is a Medicaid and healthcare professional with more than 10 years of experience in health policy, healthcare management, public health, and health systems management. She has experience in project management, policy consulting, and working with state Medicaid and health agencies. Other experience includes leading multiple project teams, facilitating meetings with executive leadership to build process mapping, developing project plans, budgets, and schedules, leading Medicaid State Plan Amendment (SPA) processes to approval status, leading and assisting with documenting business requirements.

### Experience

#### BerryDunn (12/2021 – present)

Shardae is a manager with BerryDunn's Medicaid Practice Group (MPG). Project highlights include the following:

- **State of West Virginia (WV)**
  - WV Bureau for Medical Services (BMS)**
    - *Partnership Management Project (01/2024 – Present)*  
Shardae works as a subject matter expert (SME) for the partnership management work provided between WV and partnering States and Territories. Through the project's leverage and reuse initiative, Shardae is helping to create and modify policies for the United States Virgin Islands (USVI) Department of Human Services (DHS), as well as helping to modify the USVI SPA.
- **Puerto Rico (PR)**
  - Department of Health (DoH)**
    - *Enterprise Objective Monitoring and Control (EOMC) Services (12/2021 – present)*  
Shardae has worked as Lead on multiple Medicaid projects which includes Medicaid Information Technology Architecture (MITA), SPAs, and Money Follows the Person (MFP) for the Puerto Rico Medicaid Program. Her team has successfully worked with Puerto Rico to achieve approval for several SPAs that



has positively impacted the residents of Puerto Rico. Shardae provides great customer services and support to clients as it relates to Medicaid policy.

**Incept Data Solutions, Inc. (12/2019 – 12/2021)**

As a policy consultant, Shardae was responsible for the review of all Medicaid and Children's Health Insurance Program (CHIP)-related policies, including state and federal policies, rules, regulations, and sub-regulatory guidance; advising PERM data processing and review staff on interpretation of policy; and discussing the effect of policy on review. She helped to ensure all policy related requirements and deliverables listed in the PERM SOW are completed thoroughly and timely, including compilation and completion of each state's Master Policy List, upload and processing of all state policies, and compilation and completion of the Federal Regulation tracker. She also worked with data processing and medical review SMEs to discuss policy interpretation, as well as applications development staff to help ensure all policies are uploaded properly as required in the SOW.

**Georgia Department of Behavioral Health and Developmental Disabilities (2014 – 10/2019)**

As a Medicaid and Health Systems Manager, Shardae coordinated with the Division of Mental Health and Addictive Diseases and Administrative Services to design and develop new Medicaid programs, Medicaid program amendment(s), and to support the Department of Community Health in behavioral health-related programs. She served as a key Medicaid subject matter expert (SME) in new systems implementation, ensuring accuracy with business requirements and functional specifications, as well as an analyst for major IT initiatives including MMIS change service requests (CSRs) between DBHDD and Medicaid Agency.

**Florida Agency for Health Care Administration – Medicaid Services (2012 – 2014)**

As a medical/healthcare program analyst, Shardae managed two managed care organization contracts within the Bureau of Medicaid Services, as well as Medicaid reimbursement program operations and coordinated program policy development and implementation. She represented the Agency as a program subject matter expert at public presentations; provided assistance to Medicaid recipients, providers, and stakeholders with policy related issues; analyzed and developed fiscal impact statements on proposed cost containment measures and program revisions; and conducted policy reviews, as well as systems analysis and development. Shardae also significantly contributed to the Implementation of the 1115 Demonstration Waiver for Statewide Medicaid Managed Care (SMMC) by providing extensive research methods and policy development.

**Florida Department of Health – Central Pharmacy (2012)**

As an accountant in the procurement office, Shardae provided financial administrative assistance, including maintain purchase logs, managing reimbursements, reconciling invoices, and maintaining fiscal reports.


**Ebony Carter, MS, PMP®**

<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>	Master of Science in Health Science, focus on Community Health, Towson University Bachelor of Science in Health Science, focus on Community Health, Towson University Project Management Institute (PMI®) Certified Project Management Professional (PMP®)

**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 – present)**

Ebony serves as a senior consultant with BerryDunn's Medicaid Practice Group, assisting the West Virginia BMS program.

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Payment Error Rate Measurement Project (PERM) (04/2022 – present)*  
Ebony is serving as a project Subject Matter Expert (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 – 04/2023)*  
Ebony served as a project SME for the Fee and Edit project. In this project, Ebony was responsible for researching and validating fee schedules and/or edits and delivering outcomes to the state of WV. While researching, she also reviewed federal policy and state regulation to help ensure that the fee schedule and edits are in line with existing and current policies.
    - *Public Health Emergency (PHE) Support Project (03/2022 – 06/2022)*  
Ebony assisted with tasks related to the PHE project.
    - *PERM Advanced Planning Document (APD) (08/2022 – 01/2023)* Ebony assisted with tasks related to updating the APD document.
    - *Medicaid Information Technology Architecture (MITA) 3.0 SSA*



*Maintenance and Annual Update Assistance Project (11/2022 – present)*

Ebony is serving as a SME assisting with the update of the Health Information Technology (HIT) report, MITA life cycle maintenance activities and update MITA related reports.

- *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*

Ebony serves as a SME for the project, where she supports the strategic planning of APDs. In this role, Ebony assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and \ management of multiple APD's in support of funding for new DoHS systems projects.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (09/2023 – present)*

Ebony serves as an MMIS SME on the West Virginia Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (09/2023 – present)*

Ebony serves as a MMIS SME on the West Virginia Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project.

- **Arizona Health Care Cost Containment System (AHCCCS)**

- *Forensic Accounting/Auditing (06/2023 to 09/2023)*

Ebony served as a SME to analyze claims processes and procedures, identified potential program integrity risks and reviewed payment activity post reimbursement to providers.

**General Dynamic Information Technology (10/2021 – 03/2022)**

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

**NCI, Information Systems (11/2018 – 10/2021)**

Ebony worked as a Data Processing Subject Matter Expert with CMS to provide technical direction and guidance to the data processing team and to CMS stakeholders. She created training material in line with CMS guidelines and federal regulation requirements, updated standard operating procedure guidelines for team, and monitored data processing workflow. Ebony performed quality assurance reviews of completed audits, conducted queries, and communicated data findings in written reports, oral reports, and presentations. She analyzed data to determine appropriate actions and was responsible for determining knowledge gaps,



work process improvements, and technical system updates to assist with creating streamlined audit process. She created a review schedule to help ensure milestones were met on time and reviewed all state MMIS systems to help ensure claims adjudicated correctly, beneficiaries were eligible for services, and providers were enrolled and screened appropriately.

**A+ Government Solutions, LLC/CNI Advantage LLC (08/2015 – 11/2018)**

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

**Maryland Department of Health and Mental Hygiene (DHMH) (07/2008 – 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 one city in the Medicaid Transportation Grant program for budget requirements and to help 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 healthcare delivery and health initiatives by participating in routine audits (on-site 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.





## Nycole Washington

<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>	Associate in Applied Science, Computer and Network Administration, Remington College

### Overview

Nycole is a dedicated Claims Representative with 23 years of experience in the healthcare industry. Her background includes processing and auditing medical (professional, hospital), Dental, Medicaid, Medicare claims for payments, adjustments, data entry, refunds, and interpreting network pricing. She was responsible for performing quality assurance reviews in accordance with guidelines, and has developed excellent analytical, organizational, and communication skills.

### Experience

#### **BerryDunn (04/2022 – present)**

Nycole is a consultant with BerryDunn's Medicaid Practice Group (MPG) and supports the following projects:

- **State of West Virginia (WV)**
  - **WV Bureau for Medical Services (BMS) (04/2022 – present)**
    - *WV APD Consulting Services project (06/2023 – present)*  
Nycole serves as a Subject Matter Expert (SME) and supports the strategic planning of APDs. In this role, Nycole assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and management of multiple APD's in support of funding for new DoHS systems projects.
    - *Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (02/2023 - present)*  
Working as a SME for the project, Nycole assists with MITA life cycle maintenance activities and update MITA related reports.
    - *Payment Error Rate Measurement (PERM) RY2023 Project (04/2022 – present)*  
Nycole serves as a project SME for the PERM project. She focuses on validating data processing and medical record errors, researching error remedies and providing recommendations for resolution of PERM errors cited for WV.
    - *Public Health Emergency (PHE) Support Project (04/2022 – 06/2022)*  
Nycole supports the PHE Support Project to assist WV with the preparing and planning and unwinding activities once the PHE ends.
    - *Fee Schedule and Edit Quality Review Project (04/2022 – 07/2023)*



Nycole served as a SME for the project. She focused on evaluating the Medicaid Management Information System (MMIS) fee schedules and claim edits to help ensure MMIS setup complies with Medicaid policy and to provide analysis of cost savings opportunities for BMS.

**NCI Company (03/2017 – 03/2022)**

Nycole worked as a Lead Medicaid Reviewer with CMS's PERM project, where she developed performance standards for less experienced staff to meet CMS metrics/timeliness requirements, worked with Medicaid staff to set goals, develop processes, and set timeliness, and collaborated with IT staff to gain access and troubleshoot problems that prevent access and troubleshoot problems that prevented access to state MMIS for direct reports. She supported team members with review of exceptions and resolution of conflicting findings from lower-level reviewers while also working one to one with less experienced reviewers to develop individualized standards involving claims processing, authorization, and payment. This required reviewing individual outcomes against these standards and collaboratively developing an individualized corrective plan. She researched complex review situations, analyzed multiple claim processing, eligibility enrollment, and provider enrollment systems, and made informed decisions to determine if the information in all systems resulted in an accurate payment determination. Nycole consulted with management and staff stakeholders the implication of how state and federal policies and regulations were applied in differing claims scenarios. In addition, she read, interpreted, and applied complex Federal and State regulations and their impact to claim processing. She suggested revisions to any impacted work products or standard operating procedures because of changes in federal or state regulations impacting Medicaid claims payment accurately. Nycole conducted audits of claims processing systems across the country, worked closely with the state liaison to determine missing items to complete review, and analyzed Federal and State regulations / policies for Medicaid and CHIP reimbursements. Nycole determined if monies paid by the states were made in accordance with Federal and State policies for Medicaid and CHIP. For each state, she performed audits accessing several systems and applications, such as MMIS, PECOS, Citrix, QNXT, and Facets while maintaining the confidentiality of patient information in accordance with HIPAA regulations and participating in entrance and exit conferences with key personnel in state Medicaid agencies. She also participated in drafting and producing monthly and end-of-review period reports and identified and reported potential fraud discovered during the audit process.

**Star Administrators (11/2015 – 03/2017)**

Nycole worked as a Claims Analyst to adjust and process claims (medical, Medicaid) as the main customer service contact to resolve issues and identify customer needs in a proactive manner. She reviewed and processed insurance to verify medical necessities and coverage under policy guidelines, utilized systems to track complaints and resolutions, and verified correct plan loading.

**BroadPath Healthcare Solutions (07/2014 – 11/2015)**



Nycole worked as a Claims Processor to manage UB and HCFA claims, check claims to make sure each claim processed correctly according to the benefits and plans and maintain quality and production goals. She adjusted claims due to corrective billing or additional charges.

**Dell Inc. (09/2013 – 07/2014)**

Nycole worked as a Senior Claims Operations Associate to reprocess claims for United Health Care applying correct Medicaid rates. She assisted with training of staff on coordination of benefits (COB) and Medicaid claims and served as point of contact for questions from team members.

**REDC Default Solutions LLC (01/2012 – 09/2013)**

Nycole worked as an Operations Assistant to manage sensitive information utilizing appropriate macros. She captured credit scores to upload for reporting, uploaded documents to internal/external systems, verifying for accuracy, and tasked files in Equator system to appropriate status. She provided quality assurance reviews, created various reports that consisted of aged files, monitoring of files for compliance, and wrote Welcome/Decline/Solicitation Letters. She processed incoming daily mail and monitored fax boxes and emails from the Borrower and/or the Agent.

**BlueCross and BlueShield of Texas (05/2011 – 08/2011)**

Nycole worked as a Claims Examiner to research claims for refund. She adjusted Medicare, Cob claims due to other insurance paid primary; adjusted claims paid due to billing errors; adjusted claims that were paid due to duplicate payments; and adjusted Workers Comp claims to apply due to reimbursement.

**Unicare Insurance (10/2000 – 07/2010)**

Nycole worked as a Claims Representative to process UB and HCFA 1500 Claims, obtain the contracted allowed amount from Unicare's rental network partners, and monitor the timeliness of the claims for their networks. She worked with the network contacts on outstanding claims, providing claims payment status and check information, and responded to emails, faxes, and correspondence to obtain the appropriate information, as well as the utilizing WGS and STAR systems to apply updates. She processed claims according to their benefit profile and Explanation of Benefits and adjusted claims while performing extensive data entry. She keyed in professional; hospital claims in WGS and STAR systems and used Pinnacle, Citrix, Hanstar.



## Sarah Renner, MPH, MBA

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	18 years
<b>Certifications and Education:</b>	Master of Public Health, Indiana University Master of Business Administration, University of Indianapolis Bachelor of Arts in Political Science, Hanover College

### Overview

Sarah is a senior consultant in the Medicaid Practice Group. With over 20 years of state government management and consensus building experience, she has a talent for rapidly learning and mapping new and complicated information. Sarah's natural ability to listen, communicate, and collaborate, combined with her drive for results, allows her to be an invaluable asset to the states and clients that she works with. She leads and participates in improving health equity and manages sensitive and confidential information with delicacy and care.

### Experience

#### BerryDunn (08/2022 – present)

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (WV BMS)**

- *Behavioral Health Continuum of Care 1115 Waiver (08/2022 – present)* As a policy analyst and subject matter expert (SME) Sarah works to update the substance use disorder (SUD) implementation plan, researching and developing new service definitions and writing the Serious Mental Illness (SMI) implementation plan for Phase 1. In addition, Sarah assists in the development and negotiation of a Section 1115 Demonstration Project to undertake behavioral health delivery system transformation in WV. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD and SMI.
    - *American Rescue Plan Act (ARPA) Section 9817 Home and Community-Based Setting (HCBS) Implementation Plan Project (08/2022 – present)* Serving as project manager, Sarah oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased Federal Matching Assistance Percentage (FMAP) allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Sarah also leads



workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (08/2022 – present)*

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

- **Minnesota Department of Human Services (DHS)**

- *Program Analysis of Implementation of a Program of All Inclusive Care for the Elderly (PACE) Program (09/2023 – present)* Sarah currently serves as a SME for a project to help DHS analyze options for the implementation of PACE. In this role, Sarah designed an analysis of existing programs, contributes to stakeholder engagement, and assists with the development of project deliverables.

**Indiana Family and Social Services Administration (FSSA) (02/2018 – 08/2022)**

Sarah served as the Director of Division of Aging to co-Chair FSSA long-term services and support reform workgroup to increase the number of people living in a HCBS, supported by an integrated data environment, and focusing on caregiver training and supports. She participated in developing a Managed Long-Term Services and Supports (MLTSS) design book, responses for information (RFIs), and requests for proposals (RFPs), and expedited eligibility process and consumer engagement forums. She designed and implemented Indiana's first caregiver survey to assess caregiver awareness, supports needed, financial hardships, and health status, and also led COVID-19 response efforts for the Division which included development of the Essential Family Caregiver long-term care facility guidance, Area Agency on Aging (AAA) vaccine registration project, Homebound Hoosier Project, high-risk participant emergency planning project, Admission, Discharge, and Transfer (ADT) data sharing project between dual special needs health plans (DSNP) and AAAs, and caregiver supports awareness campaign. She oversaw the Aged and Disabled and Traumatic Brain Injury (TBI) waivers specifically focusing on rate methodology and rate setting, healthcare integration services, and structured family caregiving to enhance home and community-based services for older adults, people with physical disabilities, and TBIs. She helped to ensure Indiana's State Unit on Aging follows the Older Americans Act, the HCBS Settings Rule and collaborates with the Indiana Department of Health Long-Term Care Division while focusing on long-term care options that enhance choice, equity, and quality of life. Sarah optimized the Adult Protective Services Program (APS) by focusing on improving the case management system, reducing burdensome financial approvals, and designing collaboration opportunities for APS Units and social service programs. She also



supported the Division's leadership in developing the Indiana Dementia Task Force focusing on workforce training, healthcare integration, and caregiver supports.

#### **Myers and Stauffer, LC (10/2015 – 02/2018)**

Sarah served as a Senior Manager in Consulting to lead internal team working on the Idaho Department of Health and Welfare (DOHW) Patient Centered Medical Home Incentive Payment Accounting System (PCMH I-PAS) which required information system, dashboard, progress measure, incentive payment, and recoupment design development. She managed project budget, invoicing, and financial reconciliation, and led the New Jersey Department of Health (DOH) implementation of the Delivery System Reform Incentive Payment (DSRIP) program, a demonstration program designed to result in better care for individuals and populations and lower costs by transitioning payment to incentive outcome attainment. She also managed staff, budget, and contract deliverables, and oversaw Databook updating, payment generation, performance measure results reporting, learning collaborative presentations, progress report reviews, and client relationships. She participated in the New Hampshire DOHW implementation of the DSRIP Independent Assessor and Learning Collaborative projects which included designing technical assistance and training tools for Independent Delivery Networks (IDNs), developing project plan evaluation tools, evaluating project plans, and providing training and technical assistance to IDNs during the project plan development phase.

#### **Indiana DOH (IDOH) (07/2005 – 10/2015)**

- *Director for Women, Infants and Children (WIC) (02/2010 – 10/2015)*  
Sarah optimized \$150 million in supplemental food and nutrition services serving 280,000 woman, infants, and children through 140 clinics and 700 grocery stores and pharmacies. She implemented policy changes balanced by cost containment and nutritional need for WIC's food package revisions for prenatal, postpartum, and breastfeeding women, infants and children. She provided leadership to WIC's transition to a new information system that provides Electronic Benefits Transfer (EBT) instead of checks; enhanced WIC clinic staff performance optimization by developing Outreach and Business Development training targeting relationship-building with medical offices and hospitals; and developed WIC's first quarterly benchmarking system for local agencies administering WIC services. She consensus-built with clinic staff to implement the Loving Support Model to increase lactation rates and improve health status of WIC participants, and managed The Emergency Food Program (TEFAP), provided strategic and financial planning for Indiana's infant mortality media campaign, and led stakeholders through budget reductions due to sequestration and federal government shutdown.
- *Director, HIV/STD/Adult Hepatitis (09/2008 – 02/2010)*  
Sarah managed \$26 million state and federal dollars to build linkages between HIV/AIDS prevention, services and surveillance with STD, Hepatitis, Tuberculosis (TB), Immunization and Substance Use strategies. She collaborated with Indiana State Department of Health (ISDH) Laboratory to help ensure infection disease test results were transmitted to local health departments, community-based organizations, and Department of Corrections.
- *Deputy Assistant Commissioner (07/2005 – 09/2008)*  
Sarah supervised and provided leadership to the following Divisions: Primary Care Office,



Healthy Homes, HIV/STD/Hepatitis, Chronic Disease, Immunization, and TB. She developed and implemented operational policies and business processes for the Commission, coordinated Commission budget, legislative proposals, and performance metric projects, and served as Flood Relief Coordinator for ISDH during 2008 disaster.



## Nolan Cyr, MA

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	5 years
<b>Certifications and Education:</b>	<p>Master of Arts in Leadership Studies, University of Southern Maine</p> <p>Bachelor of Science in Leadership and Organizational Studies, University of Southern Maine</p> <p>Master Certificate in Organizational Development, University of Southern Maine</p>

### Overview

Nolan is a highly dependable and innovative consultant with experience in both organizational development and Medicaid. He has extensive knowledge of organizational systems and culture, data collection and analysis strategies, and training design, development, and implementation. Specific to Medicaid, Nolan specializes in Advance Planning Document (APD) development with extensive knowledge of APD financials.

### Experience

#### BerryDunn (06/2022 – present)

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *APD Consulting Support Project (08/2023 – present)*

As an APD SME, Nolan supports the development, updating, and tracking of BMS APDs. In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, and assures project goals and objectives are met. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

- *Provider Enrollment (PEA) Project and Provider Management Support (09/2023 – present)*

Working on the PEA Project and Provider Management Support, Nolan provides project management and APD support for the provider enrollment partnership between West Virginia and the U.S. Virgin Islands (USVI). In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, helps identify and track project risks. Nolan continues to provide support specifically focused on APD financials.

- *Organization Development Consulting Services (07/2022 – 06/2023)*

As a Business Analyst, Nolan assisted the State with activities specific to organizational development in West Virginia (WV). His focus was supporting the





State as BMS develops and implements a three-year strategic plan. Services included aiding the design and facilitation of a multi-day strategic planning retreat, creating workshops, webinars, and e-learning courses that support strategic plan implementation, deliverable development, and meeting facilitation.

- *American Rescue Plan Section 9813: Mobile Crisis Grant Project (08/2022 – 02/2023)*

As project coordinator for the ARP Mobile Crisis project, Nolan assisted the State in planning for the implementation of the Medicaid mobile crisis services program. He conducted program coordination among involved stakeholders, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the State Plan Amendment (SPA) draft.

- **BerryDunn Medicaid Learning Center (MLC) (08/2022 – present)**

- *MLC Operations Lead*

Nolan manages the platforms learning management system (LMS), course content, and technical support. In this role, Nolan spearheaded the redevelopment of the platforms website and course appearance to increase brand reputation and engagement with content. He regularly facilitates product overview meetings with prospective clients, assures product satisfaction, and evaluates current training materials to identify areas of improvement.

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

- *APD Consulting Services: Phase II (07/2022 – present)*

As an APD Analyst, Nolan is a part of the team supporting the Delaware DHSS DMMA APD Consulting Services Project, which includes developing, updating, and tracking of DMMA's APDs. In his role, Nolan drafts APD documents, tracks APD progress, reports monthly on project deliverables, and assures project goals and objectives are met. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership.

- **Hawaii Department of Human Services (DHS), MedQUEST Division**

- *Organizational and Business Process Redesign (11/2022 – present)*

As a Learning Platform Administrator, Nolan works with the job skills development (JSD) team to help develop and deliver over 30 comprehensive training courses and programs through BerryDunn's MLC. While supporting this project, he has established over 250 state employees on the platform who have completed more than 2,500 courses and 5,000 hours of training. His focus at present is helping to ensure user satisfaction with the platform, reporting on course completions, and delivering content that is engaging.

- **Oregon Health Authority, Health Promotion Chronic Disease Prevention (HPCDP) Section**

- *Culture Change Management with Trauma-Informed Approach (11/2022 – present)*

As a Change Management Subject Matter Expert (SME) and Business Analyst, Nolan supports the HPCDP Section in building and maintaining an inclusive environment by engraining culture changes into defined strategic priorities and goals. His role includes the development and facilitation of agile and inclusive



workshops, data collection and analysis, deliverable development, and meeting facilitation.

- **Iowa Department of Health and Human Services (Iowa HHS)**
  - *Medicaid Enterprise Modernization Effort (MEME) (09/2023 – present)*  
Iowa Medicaid has launched a systems modernization initiative, beginning with solutions targeted at achieving the top business priority: improving the experience for providers and Medicaid staff in provider enrollment, screening, credentialing, and maintenance of provider information. In his role, Nolan provides organizational development and organizational change management (OCM) support for the MEME project.
- **Puerto Rico Medicaid Program (PRMP)**
  - *Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 – present)*  
As an APD SME, Nolan is a part of the team supporting the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.
- **Alaska Division of Health Care Services (HCS)**
  - *Medicaid Management Information System (MMIS) Modernization (12/2023 – present)*  
As an APD SME, Nolan is a part of the team supporting the Alaska HCS MMIS Modernization project, which includes developing, updating, and tracking of Alaska HCS APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

#### **MaineHealth (05/2019 – 06/2022)**

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

#### **Student Engagement & Leadership, University of Southern Maine (09/2021 – 06/2022)**

Nolan served as Graduate Assistant to help create meaningful connections with the campus community through engagement and leadership development opportunities. He advised and mentored student leaders, oversaw group activities, and facilitated conflict resolution. He worked as lead project manager for event sequences and envisioned and constructed a campus-wide event calendar for student groups.

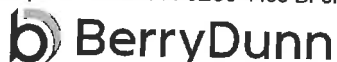


**Outdoor Adventures Board, University of Southern Maine (09/2017 – 05/2021)**

Nolan served on the executive board, which involved tasks ranging from guiding trips to overseeing club activities. He expanded student engagement, oversaw club partnerships with outside organizations, and implemented annual club leadership and wilderness medical training retreat to improve quality and safety of trips. He also managed the budget as financial chair and coordinated local and out-of-state trips.

**Publications and Presentations**

Co-Presenter – *Even Covid Couldn't Stop Us: How Hawai'i Switched Gears and Created Virtual Self-Paced JSD Courses During a Global Pandemic*, Presentation for Medicaid Enterprise Systems Conference (MESC) 2023, 08/24/2023.



## Hailey Holden

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	8 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)

- **State of West Virginia (WV)**

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

- *West Virginia Engagement Coordinator (07/2022 – present)*

As the Engagement Coordinator, Hailey is responsible for updating and maintaining a variety of documents including master project trackers, funding trackers, and project timelines. She collaborates 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 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.

- *Partnership Management Support Project (12/2023 – present)*

Hailey currently assists with leverage and reuse initiatives and provides project management support.

- *Advanced Planning Document (APD) Support Project (05/01/2023 – present)*

Hailey assists in compiling, tracking, and reviewing a variety of APDs.

- *Provider Management Support Project (01/2023 – 10/2023)*

Hailey worked on leverage and reuse initiatives for WV and the United States Virgin Islands including support with compiling and reviewing APDs.

#### El Paso County Department of Human Services (04/2021 – 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 helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress. Hailey conducted research and investigation to help ensure proper reporting, prosecution, and documentation of child abuse and neglect reports. She also performed assessments of new cases, referred clients to appropriate resources creating a substantial decrease in repeat infractions, and provided accurate updates and testimony in court hearings and mediations. She trained and supervised new caseworkers and acted in a supervisory role to members of the casework team.

**Lake County CASA Program (04/2016 – 04/2021)**

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

**Second Chance for Pets Network (01/2015 – 01/2017)**

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



## Megan Blount, MBA

<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>	MBA, University of Charleston BS, Communications, West Virginia State University

### Overview

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

### Experience

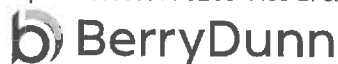
#### BerryDunn (04/2021 – present)

Currently, Megan serves as part of BerryDunn's Medicaid Practice Group, working with the West Virginia (WV) Bureau for Medical Services (BMS) on project management initiatives.

- **State of WV**

- **WV BMS**

- *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*  
Megan serves as a project coordinator for the APD Consulting Services project where she supports the strategic planning of APDs. In this role, Megan assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and management of multiple APD's in support of funding for new Department of Human Services (DoHS) systems projects.
    - *Public Health Emergency Support Project (12/2021 – present)*  
Megan provides project coordination, deliverable development and review, and tracks action items. Megan is involved with the creation of the Communications Plan and has assisted in creating trackers in SharePoint Online for project documents.
    - *Data Improvement Project (06/2021 – present)*  
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.
    - *Payment Error Rate Measurement Reporting Year 2023 Review Project (04/2021 – present)*  
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.
    - *WV Organization Development Project (07/2022 – 10/2023)*



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

- *Provider Management Support (PMS) Project (11/2021 – 03/2023)*  
Megan provided project coordination, deliverable development and review, and monitored risks and issues related to all sub-projects within PMS. Megan was involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.
- *Third-Party Liability Post-Implementation (01/2022 – 03/2022)*  
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.
- *Child Welfare Initiatives Phase III (12/2021 – 02/2022)*  
Megan provided project coordination, deliverable development and review, and tracked action items, as needed.
- *Third-Party Liability Implementation Project (04/2021 – 06/2021)*  
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.
- *Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 – 02/2023)*  
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

#### **WV State Tax Department (10/2019 – 04/2021)**

As a tax analyst, Megan performed research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzed data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assisted in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provided meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

#### **Thyssenkrupp Elevator (TKE) (10/2018 – 01/2019)**

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

#### **WV State University (SU) (06/2013 – 10/2018)**

- *Assistant Director, International Affairs (01/2016 – 10/2018)*  
Megan worked with both degree-seeking and non-degree-seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.
- *Assistant Director, Academic Educational Outreach (04/2014 – 01/2016)*



Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program and provided support to the WVSU Prison Initiative program.

- *Executive Secretary, Academic Affairs (06/2013 – 04/2014)*

Megan served as the Liaison for Academic Policies Committee, WVSU Board of Governors; managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.




**Katie McDonald, MBA**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Senior Paraprofessional
<b>Years of Experience Relevant to Proposed Role:</b>	6 years
<b>Certifications and Education:</b>	Master of Business Administration, focus on Healthcare Administration, Marshall University Bachelor of Arts in Communication Studies, focus on Organizational Communication, Marshall University Project Management Institute (PMI®) Certified Project Management Professional (PMP®) ( <i>in progress</i> )

**Overview**

Katie is a Senior Paraprofessional with extensive knowledge in communication skills including engaging, professional presentations, superior-subordinate communication, intercultural communication, leadership & group communication, research, theory, and rhetoric. She has developed foundational knowledge in marketing principles, public relations, economics, sales, and workplace language. Through her work she has refined superior organizational skills, detail-oriented problem-solving abilities, and has become a successful and confident communicator.

**Experience**
**BerryDunn (05/2022 – present)**

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Partnership Management (12/2023 – present)*  
Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the United States Virgin Islands (USVI). Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
    - *People's Access to Help (PATH) Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 – 03/2024)*  
Katie provides project coordination assistance to DoHS with planning and helping to manage the PATH MARS-E Security Assessment project. Katie helps with developing and reviewing project deliverables for various project-related activities and tasks.
    - *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance Annual Update Assistance Project (07/2023 – present)*  
Katie assists with MITA life cycle maintenance activities, including developing new business process improvement flows and updating MITA related reports.
    - *Provider Enrollment (PEA) Project and Provider Management Support (08/2023 –*



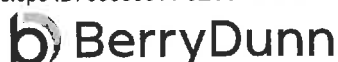
10/2023)

Katie provided project coordinator assistance with planning, developing, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

- *Advance Planning Document (APD) Consulting Project (05/2023 – present)*  
Katie provides project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *PATH DDI Project Management (03/2023 – present)*  
Katie provides project coordinator assistance with implementing the PATH system. Katie helps with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.
- *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*  
Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ, now in its fifth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

#### **Sedgwick Claims Management Services (08/2017 – 05/2022)**

Katie worked as a Claims Assistant in charge of managing the mailed claims, attending to medical and legal bill payments, and taking claimant and provider phone calls. Her responsibilities included meticulous claims data entry and verification and helping to ensure the accuracy and timeliness of information critical to the processing pipeline. Collaborating closely with teams, she identified process bottlenecks and areas for improvement, actively participating in discussions to optimize the claims administration workflow. Some tasks this affected were the workflow for processing subpoenas for claims records and the workflow for processing settlement agreements.



## Alycia Minshall, MA

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

### Overview

Alycia Minshall is an editing and communications professional with more than 14 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

### Experience

#### **BerryDunn (8/2022 – present)**

Alycia works with the BerryDunn team in West Virginia (WV) to provide documentation support. Alycia provides copyediting, proofreading, and formatting services for BerryDunn deliverables. She also develops and delivers presentations on various writing topics, including creating accessible documents; integrating diversity, equity, and inclusion principles in deliverables; and using PerfectIt to self-edit.

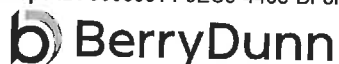
#### **Alycia Minshall Editing Services (3/2014 – present)**

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 – 8/2021)**

- *Senior Editor (6/2020 – 8/2021)*

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



treatment of diversity, equity, and inclusion principles.

- *Editor (4/2017 – 6/2020)*

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

**University of Southern California Graduate School of Social Work (9/2015 – 6/2016)**

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

**Central Michigan University Writing Center (8/2013 – 6/2014)**

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

**Central Michigan University (1/2012 – 6/2014)**

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

**Alma College Writing Center (8/2008 – 12/2011)**

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

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

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

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



## Caitlin Cabral

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Documentation Specialist
<b>Years of Experience Relevant to Proposed Role:</b>	4 years
<b>Certifications and Education:</b>	Bachelor of Arts in Psychology, University of Hartford Poynter ACES Certificate in Editing

### Overview

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

### Experience

#### **BerryDunn (09/2021 – present)**

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

#### **QualityMetric (08/2020 – 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 – 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 – 05/2019)**

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations,



identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

**University of Hartford's Department of Communication (09/2018 – 05/2020)**

Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at university events.



## Carol Ann Guay

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Lead Project Coordinator
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	Bachelor of Science in Accounting, University of Southern Maine ( <i>in progress</i> )

### Overview

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

### Experience

#### BerryDunn (10/2014 – present)

Carole Ann serves as a project coordinator with additional administrative duties. Selected project work includes:

- **State of West Virginia (WV)**
  - **WV Department of Human Services (DoHS)**
    - *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 – 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.
- **Puerto Rico (WV)**
  - *Enterprise Objective Monitoring and Control (09/2023 – present)*  
Carole Ann assists with review and updates of deliverables.
- **Ellis County, Texas (TX)**
  - *Computer-Aided Dispatch and Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 – present)*  
Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.
- **City of Saint Charles, Missouri (MO)**
  - *Enterprise Resource Planning (ERP) System Selection Project (09/13/2023 – 10/06/2023)*  
Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.
- **Metropolitan Government of Nashville and Davidson County (Metro), Tennessee**
  - *Information Security Program Development (05/2016 – present)*  
Carole Ann worked as a project coordinator for Metro's development of their



Information Security Management Program, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

- **Vermont Department of Vermont Health Access**
  - *Vermont Health Connect Financial and Programmatic Audit (01/2016 – present)*  
Carole Ann currently serves as the project coordinator on the State's financial and programmatic audit of its Health Insurance Exchange completed for FYE 6/16 and in progress for FYE 6/17 to determine whether the exchange is in material compliance with 45 CFR 155.
- **Minnesota Health Benefit Exchange (MNsure)**
  - *Programmatic Audit (10/2015 – present)*  
Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements as BerryDunn performs the programmatic audit for the State's health insurance exchange.
- **Sacramento Municipal Utility District (SMUD)**
  - *Information Security Audit (08/2016 – 12/2017)*  
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **Massachusetts State Ethics Commission**
  - *CMS Planning and Implementation Services (04/2017 – 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 – 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 – 2014)**

As the office coordinator, Carole Ann oversaw several operations, including payroll for an 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.





## Emily Hendrickson

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Documentation Specialist
<b>Years of Experience Relevant to Proposed Role:</b>	11 years
<b>Certifications and Education:</b>	<p>Bachelor of Arts in English Literature and Language, Gordon College</p> <p>Bachelor of Arts in Biblical and Theological Studies, Gordon College</p> <p>Poynter ACES Certified Editor</p>

### Overview

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

### Experience

#### **BerryDunn (07/2017 – present)**

Emily provides editorial and quality reviews of client deliverables such as IT strategic plans, feasibility studies, and assessment reports for the government consulting group. She supports BerryDunn consultants, offering content revision suggestions and helping to ensure that quality, style, and branding standards are met for all deliverables. She has developed and delivered numerous writing presentations focusing on best practices and addressing common business writing challenges.

#### **Christianbook (06/2021 – present)**

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

#### **Rose Publishing/Tyndale House (02/2021 – 12/2021)**

As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant



content for tone, clarity, and structure and performed information-gathering to revamp text and fact-check quoted material.

**Martin's Point Health Care (04/2016 – 07/2017)**

As a patient services representative, Emily was responsible for queue management, including appointment scheduling. She collaborated with the health information management team to identify areas for improvement in document tracking to help close care gaps and increase quality measure metrics.

**Youngclaus & Company (01/2016 – 04/2017)**

As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and helped to ensure accurate electronic filing of both client and account documents in company database per standard workflow. She performed quality review of documents after scanning to confirm completeness of the electronic file.

**Seacoast Christian School (09/2014 – 06/2015)**

Emily taught English and Creative Writing, adapted lesson plans to achieve short- and long-term educational objectives and demonstrated classroom management skills while inspiring students to succeed.

**Civil Consultants (09/1999 – 07/2014)**

As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing, and proofreading proposals, project submittals, and correspondence; printing and assembling reports; and maintaining paper and electronic filing. She was also responsible for graphic design work.

**Foster's Daily Democrat (04/1996 – 08/1999)**

As a newspaper copy editor, Emily worked on the news desk editing reporters' stories for syntax, grammar, style, and content.



## Janine DiLorenzo

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Documentation Specialist
<b>Years of Experience Relevant to Proposed Role:</b>	13 years
<b>Certifications and Education:</b>	Bachelor of Arts in Early Childhood Education, Stonehill College

### Overview

Janine has more than 13 years' experience writing reports, grants, and outreach materials, designing graphics and publications, and creating communication/organizational systems in education and non-profit organizations. She has worked with educational institutes to develop skills in project management, communication, and planning.

### Experience

#### **BerryDunn (01/2022 – present)**

Janine is responsible for proofreading, copyediting, and formatting client deliverables, including project management documents, proposals, reports, memos, presentations, and meeting notes.

#### **Breakwater School (08/2019 – 08/2021)**

Janine worked as a Preschool Teacher 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 – 06/2018)**

- *Program Coordinator (06/2014 – 06/2018)*

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



- *AmeriCorps\*VISTA, Brockton's Promise Coordinator (08/2012 – 08/2013)*  
Janine coordinated communications and logistics among five committees in a cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and wrote copy for website and social media outreach channels.
- *AmeriCorps\*VISTA, Brockton Parents Magazine (06/2011 – 08/2011)*  
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000-copy distribution via businesses, schools, municipal buildings, and social service agencies.

#### **Stonehill College (08/2010 – 05/2011)**

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



## Jonathan “Jon” Williams

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

### Overview

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

### Experience

#### **BerryDunn (02/2019 – present)**

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

#### **Freelance Proofreader and Copyeditor (11/2010 – present)**

Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit children’s books, novels, and various other local publications.

#### **Midwest Tape (11/2004 – 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 (mwtnnewsandviews.com), social media, and other projects. He serves on a committee that established the company’s brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

#### **Mitchell Equipment Corporation (02/2002 – 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 and met with current and potential vendors. He scheduled service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

#### **Spring Hill Nurseries (02/2001 – 06/2001)**



Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spelling, and wrote copy for planting guides included with shipments.



## Jordan Ramsey, MA, LSSGB

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Documentation Specialist
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	Master of Arts in English: Professional Writing, Southeast Missouri State University Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign Lean Six Sigma Green Belt Certification (LSSGB) Poynter ACES Certified Editor

### Overview

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

### Experience

#### BerryDunn (07/2019 – present)

In his role as Senior Writer/Editor, Jordan manages a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations. He also led an effort for the entire Consulting Team (approximately 350 people at the time) to install and utilize the PerfectIt software, an application that checks for consistency in documents.

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

#### Portland Adult Education (2019)

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

#### Pearson Smarthinking Writing Lab (2017)



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

**Southeast Missouri State University (2015 – 2017)**

As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press. As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

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

**The Southern Illinoisan (2014 – 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 – 2010)**

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





## Megan Hamilton, MA

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Documentation Specialist
<b>Years of Experience Relevant to Proposed Role:</b>	11 years
<b>Certifications and Education:</b>	Master of Arts in Literary and Cultural Studies, Carnegie Mellon University Bachelor of Arts in English, Kent State University Poynter ACES Certificate in Editing

### Overview

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

### Experience

#### **BerryDunn (12/2022 – present)**

Megan works with the BerryDunn team in West Virginia to provide documentation support.

#### **Fiverr (05/2022 – 12/2022)**

Megan served as a Freelance Editor and Proofreader on professional documents for clients.

#### **Institute of Reading Development (05/2021 – 08/2021; 05/2022 – 12/2022)**

Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

#### **Carnegie Mellon University (08/2021 – 05/2022)**

Megan served as a Research Assistant to gather and articulate research findings for a range of academic projects.

#### **Brainchild Literary Magazine (08/2020 – 05/2021)**

Megan served as Editor in Chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

#### **Academic Success Center (08/2018 – 05/2021)**

Megan served as a tutor and as Program Assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.



**Seglian Manufacturing Group (01/2012 – 01/2022 [seasonal])**

Megan served as an administrative assistant, directly under Finance Director, to edit and update pertinent documents for ISO auditing and company records. She created MS Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



## KD Dobyne

<b>Proposed Project Role</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator
<b>Years of Experience Relevant to Proposed Role:</b>	1 year
<b>Certifications and Education:</b>	Bachelor of Arts, Linguistics, University of Texas at Arlington

### Overview

KD is an experienced project coordinator, bringing one year of administrative support and project assistance. She presents with excellent time management skills and attention to detail that she applies to all her project work.

### Experience

#### **BerryDunn (09/2023 – present)**

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

#### **Qualtek Wireless (08/2022 – 09/2023)**

As a project coordinator, KD was responsible for responding to client needs to help ensure successful receipt of project deliverables, including spreadsheets, PowerPoints, and closeout packages. She created and delivered purchase orders and managed materials through Salesforce. She took responsibility for all administrative tasks and managed Verizon's SPM Tracker. KD also identified and communicated potential hurdles and areas for improvement within multiple project timelines.

#### **University of Texas at Arlington (08/2018 – 05/2019)**

As president of the Asian Student Association, KD managed multiple projects at once to plan and execute a successful year for the organization. She acted as the "face" of the organization by attending presidential roundtables and meeting with the President of the University to track progress and identify any issues. KD led and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

#### **Joliet Junior College (08/2016 – 05/2017)**

KD worked as the admissions office assistant and led prospective students through the admissions process and provided exemplary customer service to meet admissions percentage goals. She completed data entry tasks, such as the entering of standardized testing scores, as well as the organization of student admission packets. KD supported senior admissions employees by completing office tasks such as printing, copying, and filing and built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.



## 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>	<p>Regents Bachelor of Arts Degree, emphasis in English Literature, Marshall University</p> <p>Associate of Arts Degree, emphasis in English, West Virginia University Parkersburg</p> <p>Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)</p>

## Overview

Cate is an experienced researcher and writer with extensive knowledge of documentation and communication needs related to Medicaid and Managed Care Organization (MCO) billing and coding, quality measures tracking, prior authorizations, step therapies and claims documentation, change management, and system requirements. Her attention to detail has allowed her to be an invaluable resource for assisting with the drafting and interpretation of deliverables, Requests for Proposals (RFP), meeting agendas and notes, and other critical project documentation. She presents a well-developed understanding of project and system requirements, particularly as relates to Medicaid Enterprise Systems privacy and security architecture and established security frameworks, such as the National Institutes for Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Safeguards for Exchanges (MARS-E) frameworks. She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Cate has 7 years' experience researching and documenting detailed and concise information in the insurance, clinical practice, and project management settings, with a latter focus on documenting, understanding, and articulating compliance needs throughout both systems development and project lifecycles.

## Experience

### BerryDunn (06/2021 – present)

As a consultant, Cate supports a variety of critical West Virginia projects and initiatives, in a multitude of capacities, such as project management, project coordination, subject matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the WV Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to the WV client needs.

- **State of WV**



### **WV Bureau for Medical Services (BMS) (06/2021 – present)**

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 – present)*

As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and 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). As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address security-related items and workflows per Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC) guidance.

- *Data Improvement Project Phase 4 (06/2023 – present)*

As a project manager, Cate assists with refining, expanding, and initiating the DIP systems development life cycle (SDLC) body of work and preparing for the transfer of the work to the SDLC Coordination Project. This includes organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitates meetings between BerryDunn, State, and vendor(s) to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate also assists with WV engagement hours and resource planning oversight within this role.

- *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (06/2023 – present)*

As a project consultant, Cate assists in contributing and refining system architecture design requirements content to support the State in defining system requirements and desired outcomes for MCES module procurement(s), including specifications related to interactions with the data integration hub and systems privacy and security compliance.

- *Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 – 10/2023)*

As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project time and documentation needs.

### **West Virginia Department of Human Services (DoHS)**

- *Eligibility and Enrollment Implementation Assistance –People's Access to Help (PATH) (06/2021 – present)*

As a project coordinator for the PATH project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and 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 – 06/2021)**

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

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

#### **PacificSource Health Plans (09/2015 – 11/2015)**

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

#### **Wal-Mart Supercenter (08/2014– 09/2015)**

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

#### **Highmark WV BCBS (10/2012 – 07/2014)**

As a member services representative-senior markets, Cate provided quality customer care for Medicare Advantage Plans (MAPDs) and Prescription Drug Plans (PDPs) in accordance with HIPAA regulations and managed a high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and



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

In this position, Cate 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 – 10/2012)**

As a part-time innkeeper, Cate 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 – 01/2012)**

As a cashier Cate 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. Cate assisted other departments in working freight and coordinated special projects, including a sustainability plan to implement proper recycling procedures.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Monthly status update
02	Monthly Status Report	Monthly status update
03	APD (as needed)	The project team will compile APDs on an as needed basis upon request from the State. Any APDs will be submitted to the State and/or its partners for submission to CMS.
04	APD-U (as needed)	The project team will compile APD-U's on an as needed basis upon request from the State. Any APD-U's will be submitted to the State and/or its partners for submission to CMS.
05	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.





## Appendix C: Acronyms/Abbreviations

**Table 5: Acronyms/Abbreviations**

Acronym/Abbreviation	Definition
APD	Advance Planning Document
APD-U	Advance Planning Document – Update
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
IAPD	Implementation Advance Planning Document
GPM	General Project Manager
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MES	Medicaid Enterprise System
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OM	Operations Management
PE	Performance Management
SOW	Scope of Work
SS	Support Staff
State	West Virginia
USVI	United States Virgin Islands

## 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			

<b>Organization Information</b>			
<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>	

<b>Authorized Shares</b>	<b>Young Entrepreneur</b>	<b>Not Specified</b>

<b>Addresses</b>	
<b>Type</b>	<b>Address</b>
<b>Designated Office Address</b>	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Mailing Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
<b>Notice of Process Address</b>	CORPORATION SERVICE COMPANY 209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Principal Office Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
<b>Type</b>	<b>Address</b>

<b>Officers</b>	
<b>Type</b>	<b>Name/Address</b>
<b>Member</b>	CHARLES K. LEADBETTER III 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	DAVID A. ERB, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	SARAH BELLIVEAU, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Type</b>	<b>Name/Address</b>

<b>DBA</b>			
<b>DBA Name</b>	<b>Description</b>	<b>Effective Date</b>	<b>Termination</b>
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

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

**Date filed**

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

Monday, June 3, 2024 — 8:51 AM

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