



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: 05-20-2024

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 BMS2400000042 1	Procurement Folder:	1428137
Document Name:	Advance Planning Document (APD) Consulting Services Phase II	Reason for Modification:	
Document Description:	Advance Planning Document (APD) Consulting Services 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 <div>24 FILE LOCATION _____</div>
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount: \$1,177,470.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE: 6/13/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: 6/14/24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Advance Planning Document (APD) Consulting Services Phase II

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

Total: \$1,177,470.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$51,600.00
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

Dawn Webb 240 hours @ \$215 = \$51,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$16,470.00
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

Nicole Becnel 61 hours @ \$270 = \$16,470.00

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	\$919,980.00
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

Ed Daranyi 26 hours @ 180 = \$4,680
Jason Hargrove 60 hours @ 180 = \$10,800
Alex Lyubarov 60 hours @ 180 = \$10,800
Brody McClellan 60 hours @ 180 = \$10,800
Meghann Slaven 60 hours @ 180 = \$10,800
Darrah Ruiz 120 hours @ 180 = \$21,600
Mary Stewart 60 hours @ 180 = \$10,800
Marnie Hudson 100 hours @ 180 = \$ 18,000
MaryLou Banker 60 hours @ 180 = \$10,800
Susan Chugha 60 hours @ 180 = \$10,800
Julie DuPuis 250 hours @ 180 = \$45,000
Rick Hayward 60 hours @ 180 = \$10,800
Marie LaPres 60 hours @ 180 = \$10,800
Hilary Foster Moles 60 hours @ 180 = \$10,800
Peter Alfrey 60 hours @ 180 = \$10,800
Amber Davis 800 hours @ 180 = \$144,000
Ebony Carter 768 hours @ 180 = \$138,240
Crystal Fox 760 hours @ 180 = \$136,800
Sudha Ganapathy 250 hours @ 180 = \$45,000
Liz Vose 250 hours @ 180 = \$45,000
Alex Tannenbaum 60 hours @ 180 = \$10,800
Sarah Vintorini 250 hours @ 180 = \$45,000
Robert Haughton 250 hours @ 180 = \$45,000
Nycole Washington 250 hours @ 180 = \$45,000
Julie Bandy 250 hours @ 180 = \$45,000
Adam Bowman 67 hours @ 180 = \$12,060

Total: 5,111 hours @ \$180 = \$919,980.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$177,120.00
Service From		Service To		Manufacturer	Model No
2024-06-15		2025-06-14			Delivery Date

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

Alex Glowacky 60 hours @ 80 = \$4,800
Jon Watkins 51 hours @ 80 = \$4,080
Krista Clay 60 hours @ 80 = \$4,800
Kortney Kirk 60 hours @ 80 = \$4,800
AJ Mong 60 hours @ 80 = \$4,800
Matthew Oatten 60 hours @ 80 = \$4,800
Nolan Cyr 760 hours @ 80 = \$60,800
Hailey Holden 60 hours @ 80 = \$4,800
Megan Blount 60 hours @ 80 = \$4,800
Katie McDonald 510 hours @ 80 = \$40,800
Alycia Minshall 60 hours @ 80 = \$4,800
Caitlin Cabral 60 hours @ 80 = \$4,800
Carole Ann Guay 60 hours @ 80 = \$4,800
Emily Hendrickson 60 hours @ 80 = \$4,800
Jon Williams 60 hours @ 80 = \$4,800
Megan Hamilton 57 hours @ 80 = \$4,560
KD Dobyne 61 hours @ 80 = \$4,880
Jordan Ramsey 55 hours @ 80 = \$4,400

Total: 2,214 hours @ \$180 = \$177,120.00

May 1, 2024

To Whom It May Concern:

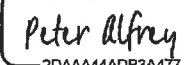
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Advance Planning Document (APD) Consulting Services Phase II Project under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration 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)

Advance Planning Document (APD)
Consulting Services 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

nbecnel@berrydunn.com

Peter Alfrey, Principal

palfrey@berrydunn.com

Submitted On:

May 1, 2024

Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) Advance Planning Document (APD) Consulting Services Phase II

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) Bureau for Medical Services (BMS) with APD submissions. BerryDunn will complete the Advance Planning Document (APD) Consulting Services Phase II work in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and West Virginia 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 assist BMS in planning, developing, and managing the APD funding process. BerryDunn formerly provided APD support services within each individual SOW. Since May 2023, the APD Consulting Services Phase I has been the centralized hub for APD work in West Virginia. The goals of continuing the APD Consulting Services into Phase II is to continue to improve quality, reduce the amount of time required to develop APDs, and to provide Subject Matter Experts (SMEs) and other required resources to support the strategic planning of APDs. This SOW is henceforth referred to as the APD Consulting Services Phase II SOW.

The APD Consulting Services Phase II project will also aid the State in meeting several of its identified MITA-specific goals, such as:

- Gen 1.0 – Improve BMS effectiveness and efficiency.
- Gen 1.4 – Support Medicaid Management Information System (MMIS) Roadmap to support future business needs.
- Gen 2.0 – Goal – Minimize risk and maximize value from contracted services and products.
- Gen 3.0 – Goal – Leverage technology to enhance performance and decision-making.
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, Deputy Commissioner, as project sponsor and Brandon Lewis, Medicaid Enterprise Systems Office Director, as project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Nicole Becnel as Engagement Manager, Dawn Webb as Lead Project Manager, and Amber Davis as Project Manager.
- This work will begin upon approval of this SOW on a mutually agreed-upon date and is projected to continue for 13 months.
- 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.
- BerryDunn and the State will explore strengthening West Virginia (WV) partnerships with states and other 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 MMIS Implementation APD (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) 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 \$1,177,470 (included in the approved APD). Therefore, any additional 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>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon acceptance of the D05: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Ed Daranyi</p> <p>Nicole Becnel</p> <p>Peter Alfrey</p> <p>Emily McCoy</p> <p>Dawn Webb</p> <p>Amber Davis</p>	362
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Maintaining a Schedule of APDs Reporting on APD Schedules Maintaining APD templates Preparing monthly project status updates, including risks, issues, and briefings for the State leadership team. 	<p>Dawn Webb</p> <p>Amber Davis</p> <p>Crystal Fox</p> <p>Ebony Carter</p> <p>Robert Haughton</p> <p>Nycole Washington</p> <p>Hailey Holden</p> <p>Sudha Ganapathy</p> <p>Nolan Cyr</p> <p>Adam Bowman</p> <p>Alex Tannenbaum</p> <p>Julie Bandy</p>	1200

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Managing project logs (action item, decision, issue, and risk tracking) <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Schedule of APDs <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 D05: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Megan Blount Liz Vose Sarah Vintorini Alex Glowacky Jason Hargrove Alex Lyubarov Brody McClellan Meghann Slaven Darrah Ruiz Mary Stewart Marnie Hudson MaryLou Banker Susan Chugha Julie DuPuis Rick Hayward Marie LaPres Hilary Foster Moles Katie McDonald Alycia Minshall Carole Ann Guay Emily Hendrickson Jordan Ramsey Johnathan Watkins Krista Clay Kourtney Kirk Adam Mong Matthew Oatten Caitlin Cabral Jon Williams Megan Hamilton KD Dobyne</p>	
3.0	<p>APD Tracking and Management</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist the State with the process for renewal and tracking progress in the development and submission of APD documents to the Centers for Medicare and Medicaid Services (CMS). Key tasks will include:</p>	<p>Dawn Webb Amber Davis Crystal Fox Ebony Carter Robert Haughton</p>	500

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Tracking Procurements Tracking APDs Conducting applicable APD research Managing the APD workflow and schedule for the State Coordinating APDs and Procurements with other Project Teams <p>BerryDunn will maintain a comprehensive budget and expense history for each project/APD to support the data provided to federal partners to assist in future budget projections.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Tracking and Management complete upon successful completion of the project and acceptance of the D05: Project Closeout Summary by the project sponsor or his/her designee.</p>	Nycole Washington Hailey Holden Sudha Ganapathy Nolan Cyr Adam Bowman Alex Tannenbaum Julie Bandy Megan Blount Liz Vose Sarah Vintorini Alex Glowacky Jason Hargrove Alex Lyubarov Brody McClellan Meghann Slaven Darrah Ruiz Mary Stewart Marnie Hudson MaryLou Banker Susan Chugha Julie DuPuis Rick Hayward Marie LaPres Hilary Foster Moles Katie McDonald	
4.0	<p>APD Deliverables</p> <p><i>Service Approach</i></p> <p>BerryDunn will supplement State resources to assist with the increasingly complex work to develop, update, and manage multiple APDs in support of funding for new BMS systems projects.</p> <ul style="list-style-type: none"> Developing and updating APDs, drafting and finalizing new APDs annually, and completing relevant work associated with APDs Assisting in the updating of APD project budget tables and Medicaid Detailed Budget Tables (MDBTs) Incorporating any changes requested by the 	Dawn Webb Amber Davis Crystal Fox Ebony Carter Robert Haughton Nycole Washington Hailey Holden Sudha Ganapathy Nolan Cyr Adam Bowman Alex Tannenbaum Julie Bandy	5,240

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>State or CMS</p> <ul style="list-style-type: none"> • Resubmission of the APD Package, as needed • Inclusion of the Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Report <p>Deliverable(s)</p> <ul style="list-style-type: none"> • D04: APD Submission Packages (per APD up to 25). The APD submission package will be developed in compliance with requirements, including but not limited to, 45 Code of Federal Regulations (CFR) 95.610. Each submission package includes: <ul style="list-style-type: none"> ○ Supporting Email Summary ○ Transmittal Letter ○ APD Narrative ○ MDBT ○ Consolidated MDBT ○ Current MITA SS-A Report <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Deliverables complete upon successful completion of the project and acceptance of the D05: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Megan Blount Liz Vose Sarah Vintorini Alex Glowacky Jason Hargrove Alex Lyubarov Brody McClellan Meghann Slaven Darrah Ruiz Mary Stewart Marnie Hudson MaryLou Banker Susan Chugha Julie DuPuis Rick Hayward Marie LaPres Hilary Foster Moles Katie McDonald Alycia Minshall Carole Ann Guay Emily Hendrickson Jordan Ramsey Johnathan Watkins Krista Clay Kourtney Kirk Adam Mong Matthew Oatten Caitlin Cabral Jonathan Williams Megan Hamilton KD Dobyne</p>	
5.0	<p>APD Strategic Planning Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will work with project stakeholders to maintain the State's APD process workflow and help facilitate strategic planning of APD submissions by the project sponsor or his/her designee. As requested, BerryDunn will review State contracts to</p>	<p>Dawn Webb Amber Davis Crystal Fox Ebony Carter Robert Haughton Nycole Washington</p>	329

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>align with MITA initiatives and recommend placement in appropriate APDs.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Strategic Planning Support complete upon successful completion of the project and acceptance of the D05: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Hailey Holden</p> <p>Sudha Ganapathy</p> <p>Nolan Cyr</p> <p>Adam Bowman</p> <p>Alex Tannenbaum</p> <p>Julie Bandy</p> <p>Megan Blount</p> <p>Liz Vose</p> <p>Sarah Vintorini</p> <p>Alex Glowacky</p> <p>Jason Hargrove</p> <p>Alex Lyubarov</p> <p>Brody McClellan</p> <p>Meghann Slaven</p> <p>Darrah Ruiz</p> <p>Mary Stewart</p> <p>Marnie Hudson</p> <p>MaryLou Banker</p> <p>Susan Chugha</p> <p>Julie DuPuis</p> <p>Rick Hayward</p> <p>Marie LaPres</p> <p>Hilary Foster Moles</p> <p>Katie McDonald</p>	
6.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables 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"> D05: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the D05: Project Closeout</p>	<p>Dawn Webb</p> <p>Amber Davis</p> <p>Katie McDonald</p>	55

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	Summary.		
Total Hours			7,686
Total Not-To-Exceed Cost Estimate			\$1,177,470

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:

- Commodity Line 9: Engagement Manager (EM) (\$270/hour)
- Commodity Line 8: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 10: Lead MMIS Project Manager (LMPM) (\$205/hour)
- Commodity Line 11: General Project Manager (GPM) (\$180/hour)
- Commodity Line 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	Nicole Becnel	61	\$16,470
8	LPM	\$215	Dawn Webb	240	\$51,600
10	LMPM	\$205	Emily McCoy	60	\$12,300
11	GPM	\$180	Ed Daranyi	26	\$4,680
11	GPM	\$180	Jason Hargrove	60	\$10,800
11	GPM	\$180	Alex Lyubarov	60	\$10,800
11	GPM	\$180	Brody McClellan	60	\$10,800
11	GPM	\$180	Meghann Slaven	60	\$10,800
11	GPM	\$180	Darrah Ruiz	120	\$21,600
11	GPM	\$180	Mary Stewart	60	\$10,800
11	GPM	\$180	Marnie Hudson	100	\$18,000
11	GPM	\$180	MaryLou Banker	60	\$10,800
11	GPM	\$180	Susan Chugha	60	\$10,800
11	GPM	\$180	Julie DuPuis	250	\$45,000
11	GPM	\$180	Rick Hayward	60	\$10,800
11	GPM	\$180	Marie LaPres	60	\$10,800
11	GPM	\$180	Hilary Foster Moles	60	\$10,800
11	GPM	\$180	Peter Alfrey	60	\$10,800
11	GPM	\$180	Amber Davis	800	\$144,000
11	GPM	\$180	Ebony Carter	768	\$138,240
11	GPM	\$180	Crystal Fox	760	\$136,800
11	GPM	\$180	Sudha Ganapathy	250	\$45,000
11	GPM	\$180	Liz Vose	250	\$45,000
11	GPM	\$180	Alex Tannenbaum	60	\$10,800
11	GPM	\$180	Sarah Vintorini	250	\$45,000
11	GPM	\$180	Robert Haughton	250	\$45,000
11	GPM	\$180	Nycole Washington	250	\$45,000

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
11	GPM	\$180	Julie Bandy	250	\$45,000
11	GPM	\$180	Adam Bowman	67	\$12,060
12	SS	\$80	Alex Glowacky	60	\$4,800
12	SS	\$80	Jon Watkins	51	\$4,080
12	SS	\$80	Krista Clay	60	\$4,800
12	SS	\$80	Kortney Kirk	60	\$4,800
12	SS	\$80	AJ Mong	60	\$4,800
12	SS	\$80	Matthew Oatten	60	\$4,800
12	SS	\$80	Nolan Cyr	760	\$60,800
12	SS	\$80	Hailey Holden	60	\$4,800
12	SS	\$80	Megan Blount	60	\$4,800
12	SS	\$80	Katie McDonald	510	\$40,800
12	SS	\$80	Alycia Minshall	60	\$4,800
12	SS	\$80	Caitlin Cabral	60	\$4,800
12	SS	\$80	Carole Ann Guay	60	\$4,800
12	SS	\$80	Emily Hendrickson	60	\$4,800
12	SS	\$80	Jon Williams	60	\$4,800
12	SS	\$80	Megan Hamilton	57	\$4,560
12	SS	\$80	KD Dobyne	61	\$4,880
12	SS	\$80	Jordan Ramsey	55	\$4,400
Total				7686	\$1,177,470

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	5	20	5	466	184	680	\$105,275
Month 2	5	20	5	415	175	620	\$95,375
Month 3	5	18	5	415	175	618	\$94,945
Month 4	5	18	5	407	175	610	\$93,505
Month 5	5	18	5	406	175	609	\$93,325
Month 6	5	18	5	400	174	602	\$92,165
Month 7	5	18	5	386	174	588	\$89,645
Month 8	5	18	5	382	174	584	\$88,925
Month 9	5	18	4	369	163	559	\$85,500
Month 10	4	18	4	369	161	556	\$85,070
Month 11	4	18	4	366	162	554	\$84,610
Month 12	4	19	4	364	162	553	\$84,465
Month 13	4	19	4	366	160	553	\$84,665
Total	61	240	60	5,111	2,214	7,686	\$1,177,470

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 APD Tracking and Management													
4.0 APD Deliverables													
5.0 APD Strategic Planning Support													
6.0 Project Closeout													



BerryDunn Authorized Signature

As a principal of this firm in our Medicaid 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:
Peter Alfrey
2DAAA44ADB3A477...

5/1/2024

Signature

Date

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

Sarah Young
Signature

5/17/2024
Date

Appendix A: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in Speech and Hearing Science, University of South Florida Certified Project Management Professional (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**

WV Bureau for Medical Services

- **Lead Manager (2012 – present)**

As lead manager, Nicole has provided project support in the areas of process improvement, best practices, and staffing allocations for the following projects:

- *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)*
- *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 multi-state 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 & Health Services (DMAHS)**

- *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 budget, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation, 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

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

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	<p>Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University</p> <p>Associate in Applied Science, Office Administration, West Virginia University</p> <p>Certified Project Management Professional (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP®)</p> <p>Certified Professional Coder, American Academy of Professional Coders</p> <p>Certified Outpatient Coder, American Academy of Professional Coders</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p>

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)*
- *Advance 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 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, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 – 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.

Emily E. McCoy, RN, BSN, PMP®

Proposed Project Role:	Lead MMIS Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	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 around 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 Department of Health and Human Resources (DHHR), Office of Management Information Services (OMIS) (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 the advocacy of patients while providing direct patient care to individuals with mental illness.

Eduardo “Ed” Daranyi, MEd, PMP®

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

Overview

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

Experience**BerryDunn (09/2005 – present)**

Ed is a principal in BerryDunn’s Government Consulting Group, leading the Medicaid practice area.

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

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

- *Engagement Manager (2012 – present)*

In his role as engagement manager, Ed provides oversight of BerryDunn’s contract with the Bureau to provide project management services for multiple projects. Ed joined the West Virginia project on a full-time basis in 2012 and has held many roles, including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Ed has not only provided engagement oversight for projects listed below but has also played an active project support role for a multitude of WV projects and initiatives.

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

- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 – 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 01/2018)*
- *E&E RFP Development Assistance (10/2015 – 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 – 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 – 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 – 12/2016)*
- *Safe at Home APD Update (08/2015 – 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 – 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 – 03/2016)*
- *E&E APD (06/2015 – 09/2015)*
- *PPACA Workgroup Oversight (2012 – 2015)*
- *5010 Refresh Project (2012 – 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 – 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 – 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*
- *Molina Health PAS Medicaid Management Information System (MMIS) Implementation*
- *Medicaid Data Warehouse/Decision Support System (DW/DSS) Implementation*
- *Substance Use Disorder 1115 Waiver Development and Implementation*
- *Affordable Care Act (ACA) Analysis and Advisory services*
- *ICD-10 Compliance*
- *Eligibility and Enrollment (E&E) Systems Modernization*
- *Adult Quality Measures*
- *Centers for Medicare & Medicaid Services (CMS) Advance Planning Development*
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment*
- *Childrens Health Insurance Program (CHIP) Implementation and Stabilization*
- *Access to Care Planning and Monitoring*

- *Provider Re-enrollment*
- *Asset Verification System Procurement*
- *West Virginia (WV) CHIP Operational Readiness Review (2019 – present)*
Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three managed care organizations (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 of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 present)*
Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supported technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.
- *People's Access to Help (PATH) DDI Project Management (10/2017 – present)* Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise integrated eligibility system (IES), known as PATH. PATH supports the eligibility, enrollment, and administration of the Department of Human Services' (DoHS) programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables are met, and risks and issues are appropriately escalated and addressed.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
As engagement manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service

coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

Ed has been the engagement manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a 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 findings of the MITA SSA and focus on DoHS goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

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

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

- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*
- Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed also focused on establishing and assisting in the management of change management processes and participated in the certification process and report

process development.

WV Department of Human Services (DoHS)

○ *Engagement Manager (06/2012 – present)*

In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DoHS to provide project management services for multiple projects and initiatives, including:

- E&E System Modernization
- Procurement Services
- Eligibility Systems Planning, Procurement, and Implementation

• **Maine Department of Health and Human Services (DHHS)**

○ *Independent Verification & Validation (IV&V) and QA Services (04/2008 – 06/2012)*

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

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

• **North Carolina Office of the State Auditor**

○ *Independent Audit of the State IT Services EPMO (04/2007 – 06/2007)*

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of the evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

Martin's Point Health Care (2005 – 2007)

Ed led a project management effort for Martin's Point Project Management for HIPAA Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and

procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

Goold Health Systems (1999 – 2005)

- **Iowa Department of Human Services (06/2004 – 08/2005)**

Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

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

- **Maine DHHS (05/2001 – 01/2002)**

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

Electronic Data Systems (1985 – 1988)

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

Presentations

Flexible Contracting and Contracting Best Practices, Presentation for MESC 2014, 08/19/2014

Project Management/Testing, Presentation for NESCSO workshop (2017)

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020

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

Jason Hargrove, MBA, PMP®, CSM®, Prosci® CCP

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

Overview

Jason is an experienced leader, implementation manager, subject matter expert (SME), and senior analyst delivering IT software solutions and services in healthcare and engineering for over 19 years. Jason brings a diverse range of skills and experience to projects and demonstrates keen understanding in areas such as business development, finance, budgeting, contract management, team development, recruiting, resource management, and project management. He leads by example, with a proven record of fostering communication at all levels of the organization, and is familiar with navigating complex and difficult situations within the project management landscape.

Experience**BerryDunn (02/2018 – present)**

Jason serves as a project manager for BerryDunn, where he oversees engagements for several states' Medicaid programs, strategically leading from the planning and procurement stages to implementation and operations. In this role, Jason focuses on resource development, strategic planning, Advance Planning Documents (APDs), solicitations (i.e., RFQs, RFPs), large technology implementations, and vendor oversight. Additionally, Jason lends his expertise as a SME and senior analyst to support several other state projects in multiple operational areas.

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

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

- *Enterprise Program Management Office (EPMO) (11/2018 – present)*

As a SME, Jason supports the engagement in multiple operational areas, including strategic planning, resource management and tracking, budget and scope development, and project management methodology and standards alignment. He also provides knowledgeable insight and expertise related to Medicaid Information Technology Architecture (MITA) and Medicaid Management Information Systems (MMIS) APD updates, maintenance, and forecasting (multiple iterations).

- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*

As an implementation project manager as well as EVV SME, Jason provided key support to help oversee a successfully completed engagement. Jason assisted BMS with the implementation of their overall EVV solution, which included strategic planning, requirement development, stakeholder engagement, solicitation development, APD and financial funding support, evaluation support, vendor onboarding support, and CMS certification support.

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

- *Medicaid Procurement of Acquisition Support Services (MES) (04/2022 – present)*

As the program manager for BerryDunn's team assisting DHS with modernization and procurement acquisition support services, Jason's focus includes visioning, researching, planning, and assisting with developing solicitations. Jason is currently leading BerryDunn's team with the development of a pharmacy RFP, as well as supporting the development of several APDs.

- **Delaware Department of Health and Social Services (DHSS)**

- *Division of Medicaid and Medical Assistance (DMMA) APD Consulting Services (06/2021 – present)*

As the senior analyst, Jason is a part of the team supporting the Delaware DHSS DMMA APD Consulting Services Project. His role includes developing, updating, and tracking DHSS DMMA's APDs and providing senior-level input and design in the drafting of APD documents and MDBT files. Additionally, he assists with updates to federal guidance and helps identify and track project risks, issues, decisions, and action items for state leadership. Jason continues to provide support in a training and oversight capacity, specifically focusing on APD financials.

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

- *Medicaid Management Information System (MMIS) Modernization (09/2020 – present)*

Jason serves as the engagement manager for BerryDunn's team supporting HCS's MES modernization and procurement activities. He collaborates directly with HCS leadership to provide subject matter expertise and assist in visioning, researching, and solicitation development efforts. Additionally, Jason is actively supporting the transition of services and vendor onboarding. Jason's leadership has been instrumental in the development of an initial modernization strategy, the creation of an MMIS Systems solicitation, and the visioning, research, and development of an MMIS Fiscal Agent solicitation.

Northern New England Diagnostics (02/2017 – 08/2017)

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

Change Healthcare (formerly Goold Health Systems / Emdeon) (11/2005 – 02/2017)

In his time at Goold Health Systems, Jason held several positions including:

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

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

- *Ohio Medicaid PBM and Rebate Services (04/2016 – 02/2017)*
Jason served in several capacities on the Ohio project including business development, project leadership and tactical project management. He served as part of the proposal

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

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

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

Ingersoll-Rand (03/1998 – 11/2005)

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

Alex Lyubarov, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Master of Science in Computer Engineering, Dagestan State Technical University Bachelor of Science in Computer Engineering, Dagestan State Technical University MCP (Microsoft Certified Professional) PSI - Business of Health Care Providers, Payers and Life Sciences CompTIA A+ Certified

Overview

Alex is a senior manager with more than 20 years of IT experience who has worked in various Healthcare, Government, Health and Human Services and Financial Management organizations. He has led various IT projects for project scope, requirements, budget, schedule, risk management plan, communication plan, Request for Proposal (RFP)/procurement development and other project management related tasks and has developed the ability to support clients during the Systems Development Life Cycle using Agile and Waterfall methodologies. He is adept at working in a fast-paced business environment possessing excellent communication, analytical, presentation, and leadership skills.

Experience**BerryDunn (08/2021 – present)**

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS)**

- People's Access to Help (PATH) DDI Project Management (07/2021 – present)*

Alex is currently serving as the program manager overseeing BerryDunn's Project Management Organization (PMO) team supporting the implementation project for West Virginia's Integrated Eligibility System (IES), also called PATH, to support the eligibility, enrollment, and administration of the WV DoHS's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. He manages the PMO team that provides project management, certification, and compliance support working directly with Centers for Medicare & Medicaid Services (CMS) and State stakeholders. Alex also oversees Advance Planning Document (APD) submissions, deliverable review, testing support, organizational change management (OCM) support, requirements

support, and general subject matter expertise supporting the PATH Design, Development, and Implementation (DDI) project. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

- **Missouri Department of Social Services**

- *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (10/2022 – present)*

Alex is serving as the engagement manager overseeing BerryDunn IV&V team supporting MEDES.

Technology Professionals Group Inc. (11/2019 – 07/2021)

Alex worked as a senior program manager and senior business-technical consultant to support all phases of New York State Department of Health (DOH) Medicaid Data Warehouse (MDW) implementation cycle, developed customer deliverables in accordance with contract requirements and State documentation standards, and researched and provided recommendations to the client on critical business decisions. He helped on RFP/RFQ proposal responses including all aspects of document development. He also assisted leadership by providing consulting expertise in State & Local Government and Healthcare industries. He helped support daily program/project teams to support the enablement and expansion of the new and existing business initiatives.

KPMG (05/2014 – 05/2019)

Alex worked as a manager, assisting the State of Connecticut Department of Social Services (DSS) on their IES and Medicaid projects with project management and data analysis. Alex liaised between the systems integrator, IV&V and State stakeholders to help ensure the project was on time and within the budget. He also assisted on the New York State IES project, he helped develop State RFP for systems integrator vendor, in addition, he led the team of consultants to perform audit/analysis for New York County's (62) IT Systems. Alex worked as a PMO manager to lead a team of SMEs Healthcare Patient Access and Revenue Cycle assessment and implement projects for process improvements, enhance the patient experience, and reduce financial risks.

Albany Medical Health System (09/2008 – 05/2014)

Alex worked as a senior systems analyst to implement vendor purchased solutions, analyze EHR/EMR deployment, and assess needs of internal business units. He performed systems application support and provided on-site technical support for multiple environments.

Brody J. McClellan, MPA

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

Overview

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

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

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

- **WV Department of Human Services (DoHS) (09/2021 – present)**

- *Certified Community Behavioral Health Clinic (CCBHC) Project (8/2023 - present)*

Brody serves as Medicaid finance and data SME for WV Medicaid to provide assistance in planning and implementation of new CCBHC certification and operational processes.

- *Substance use Disorder – 1115 Renewal Project (10/2023 – present)*

Brody serves as data and Medicaid financing SME for the 1115 renewal project providing assistance in planning and implementation of new 1115 waiver documentation.

- *Mobile Crisis Services Planning Project (09/2021 – present)*

Brody serves as Project Lead to create a new State Plan Amendment for WV Medicaid to provide Community Based Mobile Crisis Intervention Services.

- *Mental Health Parity Compliance Project (09/2021 – 9/2022)*
Brody served as Project Lead to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and Children's Health Insurance Program (CHIP) to help ensure compliance with federally mandated mental health parity rules.
- *Mountain Health Promise (MHP) re-procurement project (09/2021 – present)*
Brody serves as Medicaid Finance and Actuarial SME.
- *Mountain Health Trust (MHT) re-procurement project (09/2021 – present)*
Brody serves as Medicaid Finance and Actuarial SME.
- *Medicaid Enterprise Systems (MES) re-procurement project (09/2021 – 3/2022)*
Brody served as Medicaid Finance and Actuarial SME.
- **Puerto Rico Department of Health Medicaid Program (12/2021 – 6/2022)**
Brody served as Medicaid Finance and Actuarial SME on the Puerto Rico finance and policy support team.

Mercer GHSC (10/2019 – 07/2020)

Brody worked as a senior consultant with roles as project manager and Project Lead for two actuarial rates team for California Medicaid. Both teams combined were responsible for rate development with impact amounts of over \$9 Billion annually. He also served as SME on various national Medicaid Financing advising projects. As project manager and lead, he improved business operations on actuarial rates teams focused on Directed Payments and Medicaid Eligibility. His work included managing credentialed actuaries throughout rate setting cycles to produce certified rates, formal project planning creations, analysis of project process, rate setting modeling process review, documentation process review, and process engineering analysis to correct problematic projects in line with management directives. Brody was also responsible for the creation of consulting communication training to assist staff and enhance effectiveness on external debriefing and client interaction and corporate intellectual capital including Centers for Medicare & Medicaid Services (CMS) pre-print responses and program design language, financial modeling templates and writing external articles. Brody was recognized as a technical and policy specialist for Medicaid Rates and Managed Care structure; Medicaid UPL rules, and methodologies such as hospital UPL and physician UPL programs.

Independent Consultant (10/2019 – 06/2020)

Brody served as an independent consultant with broad subject matter specialty in Health Insurance and Public Safety Programs including Medicaid. He partnered with clients to establish, sustain, and fortify business relationships while leveraging business development opportunities. He offered expertise in program implementation and bridging communication between senior decision-makers and technical stakeholders.

Sellers Dorsey & Associates, LLC (10/2017 – 10/2019)

Brody worked as a senior consultant with scopes of work experience in 16 states. He advised clients including hospital systems, physician practice groups, associations and state Medicaid agencies on a variety of Medicaid subject areas, focusing on Medicaid special financing programs. He also functioned as a Health Policy Specialist, General Medicaid financial and budget specialist, and General advisor on Medicaid Waiver programs (115 waivers). He created policy documents adopted and used by state governments and developed rate analytics accepted by federal government as methodologically sound.

Michigan State University (04/2015 – 10/2017)

Brody worked as the Medicaid Federal Leveraging Specialist & Access to Care Program Manager (Medicaid Special Financing Project) as well as Data Science & Analytics/Business Intelligence Cell lead for the University. He delivered high-level program financial management and control including invoicing, payments and encumbrances processing, intergovernmental transfer processing, and revenue control functions. He provided oversight of two subordinates responsible for program management and support and directed cross-functional teams across the organization. He administered over 100 contracts, consulted with contracted affiliate Hospital and Provider Clinics regarding Medicaid compliance, program structure, and access to care issues and financial maximization strategies allowed within compliance standards, and liaised with the State of Michigan Medicaid Office.

State of Michigan (12/2007 – 04/2015)

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

Meghann Slaven

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Science in Journalism, Ohio University Bachelor of Fine Arts in Performance & Choreography, Ohio University

Overview

Meghann is a manager with BerryDunn's Medicaid consulting practice focused on helping state health and human services agencies achieve their project objectives. She brings value to every project and project team through her ability to provide effective system procurement, implementation, and operations management, project management, quality management, and program leadership. Meghann has worked on multiple projects supporting critical initiatives for the West Virginia (WV) Bureau for Medical Services (BMS).

Experience**BerryDunn (10/2017 – present)**

Meghann serves as a manager with BerryDunn's Medicaid Practice Group (MPG), helping to provide project oversight, execution, and control for a multitude of projects and initiatives.

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

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

- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 – present)*

As a project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, proposal evaluation processes, and solution implementation activities. Meghann is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Additionally, Meghann assisted the project team in developing a Data Governance Roadmap.

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

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 – present)*

As Deputy Project Manager, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, and quality). WV was selected by the Centers for Medicare & Medicaid Services (CMS) and MITRE as a pilot state to test the Outcomes-Based Planning (OBP) process. Meghann led this key initiative for WV by supporting the facilitation of the OBP Pilot through activities such as monthly workgroup meeting facilitation, assessment of the current MES environment, identification of challenges and opportunities, and development of MES goals, outcomes, and metrics. Meghann tracks the budget, project status, risks, and issues and develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives.

- *WV Managed Care Organization (MCO) Encounter Data Quality (EDQ) Assistance Project (09/2020 – 02/2021)*

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

- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance (08/2020 – 04/2021)*

As a business analyst, Meghann provided guidance and assistance to the project management team to update the WV's MITA 2018 Health Information Technology (HIT) Companion Guide Report.

- *Enterprise Program Management Office (EPMO) Project (07/2019 – present)*

As a business analyst, Meghann assists WV in developing and updating its annual HIT and HIE Advance Planning Document (APD), helping the client gain over \$9 million in federal funding for HIT activities and initiatives.

- *Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 – 09/2019)*

Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to WV in an effort to assist with the integration of data sources, systems, and databases within BMS. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of key project deliverables. Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed MS Visio process flows to document client data sharing practices.

- *Gap Analysis and Project Management Services (10/2017 – 06/2018)*
As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of the capstone project deliverable. As part of a team analyzing over 2,600 impacts from the Affordable Care Act (ACA) on WV Medicaid's policy, systems, and business processes, Meghann assisted with research, writing, and assessment activities to support the development of a compliance gap analysis deliverable.

- **Puerto Rico Medicaid Program (PRMP)**

- *Puerto Rico Medicaid Management Information System (PRMMIS) Project (11/2020 – 12/2020)*
As a subject matter expert (SME), Meghann provided guidance and assistance to the project management team to update PRMP's MMIS APD and corresponding federal funding documentation.

WV School Service Personnel Association (11/2014 – 10/2017)

As a public relations specialist, Meghann was responsible for developing advocacy campaigns, monthly newsletters, press releases, public service announcements and speeches. She was also responsible for social media management including Facebook, Twitter and LinkedIn; conference planning and logistics; media relationships; and lobbying for association and partner associations.

College Summit (04/2011 – 07/2014)

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

University of Charleston (10/2006 – 03/2011)

During her time with the University, Meghann held the following positions:

- *Assistant Director of Admissions (08/2008 – 03/2011)*
Meghann assisted the Admissions Director in development of enrollment plan, developed geographical recruitment plan for admissions representatives, and trained and managed admissions representatives.
- *Admissions Representative (10/2006 – 08/2008)*
Meghann was responsible for recruitment in specified territory. She served as a University representative at recruitment events, as well as evaluated applicants, facilitated the admissions process, counseled students and families on financial aid, and assisted in implementing enrollment activities.

Clay Center for the Arts and Sciences (08/2005 – 09/2006)

As a group reservations coordinator, Meghann scheduled group visits to Avampato Discovery Museum, Clay Center, and WV Symphony Orchestra. She was responsible for maintaining and analyzing the database regarding group attendance, and assisted with museum programs and special events.

American Dance Festival (06/2004 – 07/2004)

As a press and marketing intern, Meghann developed and distributed press releases and public service announcements and coordinated visiting critic events.

Darrah Ruiz

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Certified Achieve Global Trainer Certified IDEO Storytelling for Influence Certified IDEO From Ideas to Actions

Overview

With 17 years of experience, Darrah is a seasoned internal consultant specializing in learning and development, business process redesign, and software development. Her background includes call center operations, leadership development, application development support, user interface (UI) design, and process re-engineering. With expertise in requirements elicitation, system monitoring, and solution evaluation, she has a comprehensive skill set developed across various industries. Recognized for impactful job skills development, engaging seminars, and end-to-end software development support, Darrah optimizes operational efficiency and drives positive organizational change. Known for fostering strong partnerships, she seamlessly transitions processes to virtual environments, showcasing a unique blend of Human Resources, Operations, and Information Technology proficiency.

Experience

BerryDunn (11/2019 – present)

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

- **WV Department of Human Services (DoHS) – Child Welfare Services**

- *People's Access to Help (PATH) (11/2020 – 02/2021)*

Darrah was a key contributor to the PATH Project for Child Welfare, playing a crucial role in reviewing documentation for the implementation of a new system. Darrah scrutinized system functionality and design documentation, helping to ensure precision, clarity, and alignment with stakeholder requirements.

- **State of Hawai'i (HI)**

- **HI Department of Human Services Med-QUEST Division (MQD)**

- *Business Process Redesign Learning and Development (11/2019 – 12/2023)*

Darrah crafted impactful job skills development initiatives, producing effective job aids, and learning handouts. Her expertise extends to facilitating in-person and virtual seminars that engage participants. She is a trusted advisor to branch administrators, front-line managers, and staff. Additionally, she established

targeted communication channels for learning about newly introduced Medicaid guidelines as they impact operational processes and software logic.

- *Software Release (11/2019 – 12/2023)*

Darrah offers comprehensive support for Medicaid eligibility software throughout the software development life cycle. Overhauled the release cycle process, from scope determination to on-going maintenance, enhancing efficiency. Identified and addressed specific areas needing support while creating learning opportunities. Collaborated with development vendors to improve their value proposition, strengthening partnerships. Led the transition to virtual life cycle processes during the pandemic for the division.

Department of Health (DOH)

- *Business Process Redesign (05/2021 – 07/2021)*

Darrah served as a process analyst in the transformative business process redesign implementation project for four prominent Behavioral Health Administration Divisions. She engaged in the elicitation process, demonstrating expertise in the thorough documentation, and tracking of identified requirements. Her keen diligence extended to the critical review and refinement of the overall business process, helping to ensure seamless continuity between branches.

Hawaiian Telcom/Cincinnati Bell (03/2013 – 11/2019)

- **Information Technology Services – Sr. Enterprise Business Analyst (2012 – 2019)**

Darrah successfully launched products for major clients such as HMSA, Kaiser Permanente, State of Hawaii Department of Education, DOH, and Department of Transportation, helping to ensure alignment with data requirements, timelines, and budgets. She managed the implementation of the \$250M Southeast Asia-U.S. (SEA-U.S.) Trans-Pacific Fiber Submarine Cable System, connecting Indonesia, the Philippines, Guam, Hawaii, and California. She partnered with C-Level and V-Level management to document the customer journey process using human centered problem statements to identify areas of improvement that could be measured and tracked. Darrah acted as the Scrum Master for agile projects within the internal software development team, guiding the software development life cycle and integrated Cincinnati Bell CRM system over preexisting legacy architecture for Hawaiian Telcom call centers that provide recommendations to the user based on network mapping.

- **Hawaiian Telcom Design Thinking Team (2017 – 2019)**

Darrah collaborated with a team to lead learning sessions for ad hoc internal teams, employing the design thinking methodology to address and resolve various problem statements. The program's success led to its extension for enterprise business partners like the State of Hawaii Office of Information Technology.

- **Network Operations – IP Services Group Analyst (2012 – 2013)**

Darrah engaged in close collaboration with front-line support in both field and call center environments, demonstrating a swift and effective approach to IP troubleshooting across diverse business lines and services. This includes but is not limited to VoIP, FiOptics, HSDSL, POTS, and other IP-related services. Her proficiency extends beyond immediate issue resolution as she adeptly identifies, meticulously documents, and promptly reports network risks. Darrah proactively proposed comprehensive and strategic solutions to mitigate and address these identified risks, contributing to the overall resilience and stability of the network infrastructure that meet the business rules and compliance of FCC.

Servco Pacific, Inc. (11/2006 – 02/2012)

As a Training & Development Specialist, Darrah identified and addressed departmental training needs, orchestrating sessions with documentation. She delivered ad hoc training on leadership, teamwork, customer service, and workload prioritization for individual contributors to managers and individual contributors across wholesale and retail businesses. She managed the delivery of all company surveys, consulted on in-depth analyses of survey results, and guiding action planning for each business unit. Darrah conducted comprehensive reviews and offered management assistance in formulating employee development plans. She delivered communication style (DiSC) and personality type (MBTI) reviews across in-tact teams and functional groups associated by project or initiative with the goal of building cohesiveness. At the annual Manager's Conference, Darrah designed the learning activities for 200+ participants which addressed the company mission statements and values. Darrah extended her expertise by providing valuable consulting services to front-line managers, focusing on their personal development, staff growth, and addressing human resources matters effectively.

Mary Stewart, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Science in Management, Baker University Bachelor of Business Administration, Baker University

Overview

Mary is a senior consultant with 20 years' Medicaid experience. She has extensive knowledge of the Medicaid Management Information System (MMIS), as well as subject matter expertise in claims analysis, claims adjudication, and encounter management. She has led and participated in Business Requirements Verification sessions, conducted User Acceptance Testing (UAT), and focused superior service delivery levels, operational excellence, and strategic insight.

Experience**BerryDunn (01/2023 – present)**

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

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

- *Mountain Health Trust Procurement Assistance Project (01/2023 – present)*
Mary serves as a managed care Subject Matter Expert (SME) on the WV Mountain Health Trust (MHT) re-procurement project.
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (01/2023 – present)*
Mary serves as a Medicaid Management Information Systems (MMIS) SME on the WV MES MSP Project.
 - *MES MSP Project, Home and Community Based Services, Incident and Case Management System (ICMS) project (05/2023 – present)*
Mary serves the MES MSP project as a SME supporting research support, specifically on the ICMS forms and reports analysis.

Rose International (10/2021 – 1/2023)

Mary served as a Business Analyst for the State of New Mexico to assist with the implementation of the Electronic Visit Verification (EVV) system for the Self-Directed Community Based (SDCB) population. She edited Business Requirement Documents, wrote Change Requests, and confirmed their completion, and attended Change Request Requirement Sessions. She also reviewed all training materials and attended trainings to help ensure end-users understood the new system. Mary provided feedback to leadership on ways to streamline current processes. She collaborated with Provider Management team on streamlining current database processes and reviewed Managed Care Organization (MCO) contracts for compliance with the 21st Century Cures Act.

State of Iowa Medicaid Enterprise (10/2019 – 09/2021)

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

Centene Corporation, Iowa Total Care (12/2018 – 10/2019)

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

Conifer Health Solutions (02/2018 – 12/2018)

Mary served as a Claims Denial Prevention Analyst to provide solutions to hospital departments on eliminating/reducing denials; analytics on all department denials; and coordinated resources to meet department specific needs.

Kansas Department of Health & Environment (01/2002 – 02/2018)

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

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

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

Mary was responsible for requests and statistical measures of Medicare/Medicaid data

through the application of quantitative and qualitative analyses. She updated all monthly/quarterly expenditure reports for Centers for Medicare and Medicaid Services (CMS); provided Kansas legislature and health professionals with monthly trend reports. Developed and set policy for agency medical programs; and was instrumental in the implementation of IBM®-Watson Health reporting tool-Advantage Suite.

- *Business Analyst/Lead Researcher, Bureau of Remediation (01/2002 – 10/2002)*
Mary serviced and tracked loans for the revolving Federal loan fund program. She also redesigned and maintained Bureau's website and worked with a team of colleagues to create an online web-based grant writing application.

Marnie Hudson, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	<p>Bachelor of Science in Computer Information Systems, Strayer University</p> <p>Associate's Degree, Computer Science Information Systems, Delaware Community College</p> <p>Prosci® Certified Change Management Practitioner (CCP)</p> <p>MMIS Level II – Claims Certification</p> <p>Medicaid MMIS Level I Certification</p>

Overview

Marnie is an experienced business and Quality Assurance (QA) analyst with a developer background and more than 14 years of experience in assisting with the implementation of state Medicaid Management Information Systems (MMISs). Her background includes leadership roles on five MMIS implementations and one integrated eligibility system (IES) consisting of multiple state social services. In her roles, she managed on-site and offshore teams to successfully develop, implement, and test design of requirements. Her developer background helps to clarify design of requirements and how they should be implemented to support the client's business needs. Marnie developed innovative and new process improvement procedures to create a more efficient and effective approach to gathering policy documentation and business rules to support system design.

Experience**BerryDunn (11/2017 – present)**

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

of all legacy systems. Marnie also provides monthly and periodic status reports for Requirements and Design, including the readiness of each project release.

In addition to Marnie's Requirements Lead role, she provides support developing Advance Planning Documents (APD) for Medicaid Enterprise System modernization projects.

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

- *MMIS Implementation and Certification Leverage and Reuse Project (11/2017 – 01/2018)*

As a Project Management Organization (PMO) and User Acceptance Testing (UAT) Subject Matter Expert (SME), Marnie supported testing related activities as part of the West Virginia/New Jersey Leverage and Reuse Project and worked collaboratively with the New Jersey Replacement Medicaid Management Information System Implementation Team Office. She provided input into the preparation of UAT planning activities, provided support with project activities associated with MMIS system interfaces, and conducted testing related research as needed to support project activities/testing efforts.

S2Tech/Conduent (07/2016 – 05/2017)

As a senior business analyst, Marnie drove the implementation of the New York Medicaid Management Information System (NYMMIS). This included mapping eMedNY legacy data for Financial and Claims appropriately to the database fields in new system, conducting table level analysis on both NYMMIS tables and legacy MMIS tables, and leading the data conversion component for the financial subsystem for the new NYMMIS.

S2Tech/Xerox (02/2013 – 07/2016)

During Marnie's time with S2Tech/Xerox, she worked on several projects.

- **Mississippi Modernized Medicaid Eligibility Determination System (03/2015 – 07/2016)**

- Marnie tested interface components, trained, and led team members to help ensure the proper conduct of testing methodologies and procedures, helped ensure accurate creation and execution of ~300 complex test script scenarios, successfully led the testing team through execution of test scripts across 16 different interfaces/batch processes to support the eligibility determination requirements for approval or denial of Medicaid benefits, and documented and managed testing defects.

- **North Dakota Medicaid Management Information System (NDMMIS) (02/2013 – 03/2015)**

- Marnie acted as a SME for the implementation of the NDMMIS. She helped ensure all testing efforts were developed and conducted to satisfy the Service Authorization and Electronic Document Management System functional area requirements, ensured the successful execution of ~400 test script scenarios, conducted concept sessions to discuss system functionality, and managed testing defects.

Independence Blue Cross (IBC) (06/2012 – 01/2013)

As a senior business analyst, Marnie maintained compliance with Centers for Medicare & Medicaid Services (CMS) mandates and initiatives through various programs in Medicare, including Medicare Part D and the summary of benefits for products. She compiled

requirements for improved operational process of monitoring Medicare client's maximum out-of-pocket threshold via the creation of an Access database and conducted concept sessions with product owners to capture business needs for improvements to Access databases.

Hewlett Packard Enterprise Services (01/2004 – 06/2012)

Marnie served as chief liaison as well as directed all operational and technical communication activities between Health Plan Enrollment Systems (HPES) (internal and external), the Delaware Medical Assistance Program management team, CMS, and the Delaware Prescription Drug Plans. She also served as a functional developer lead of the MMIS. This included leading the design and development of Medicare Part D System changes using Systems Development Life Cycle (SDLC) methodologies, serving as a SME in the Provider & Third-Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the Reference Subsystem.

MaryLou Banker, CAPM®, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Project Management Institute (PMI) Certified Associate in Project Management (CAPM®) Certificate in Computer Operations, Computer Learning Center of Boston Certified in American Sign Language, Northeastern University Lean Six Sigma Green Belt (LSSGB) Certification Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II)

Overview

MaryLou is a senior consultant and IV&V analyst in BerryDunn's Government Consulting group, with 20+ years of experience in IT, project coordination and management, and IV&V. She brings diverse experience working with agencies in states such as Massachusetts, West Virginia (WV), and Puerto Rico, as well as federal partners such as Health and Human Services (HHS), Centers for Medicare & Medicaid Services, and Federal Emergency Management Agency (FEMA).

Experience**BerryDunn (03/2013 – present)**

MaryLou works with BerryDunn's Medicaid Government consulting group, and has experience with the following projects:

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

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

- *People's Access to Help (PATH) DDI Project Management (07/2020 – present)*

- As a lead business analyst, MaryLou facilitates weekly meetings with project leads to discuss the Child Welfare configuration action items. MaryLou is responsible for maintaining the action item tracker within the Application Lifecycle Management (ALM) system. MaryLou is also responsible for reviewing functional design documents, mapping requirements to designs, and identifying requirement gaps. MaryLou has assisted with mapping certification outcome criteria for Eligibility and Enrollment requirements. MaryLou provides a weekly project status report to both BerryDunn and WV stakeholders that addresses key project health items, such as progress of configuration and requirement design.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement Project (MSP) (10/2023 – present)*
As a business analyst, MaryLou is responsible providing content to assist in the development of the MES Request for Proposal (RFP) and Implementation Advance Planning Document (IAPD) documents.
- *Asset Verification System (AVS) Procurement Assistance Project (02/2023 – 10/2023)*
As a business analyst MaryLou was responsible providing content to assist in the development of the AVS Request for Quotations (RFQ) and IAPD documents.
- **WV Bureau for Medical Services (BMS)**
 - *Mountain Health Trust (MHT) MCO Procurement Assistance Project (09/2019 – 9/2020).*
As a project coordinator and business analyst, MaryLou effectively summarized the client's needs and issues in meeting notes. MaryLou also contributed and brainstormed with the BerryDunn team regarding project research assignments.
- **Puerto Rico Medicaid Program (PRMP)**
 - *Puerto Rico Eligibility and Enrollment (PREE) Enterprise Objective Monitoring and Control (EOMC) Services (01/2020 – 01/2022)*
As a business analyst and project coordinator, MaryLou reviewed the evaluation criteria for the Outcomes-Based Certification (OBC) effort of the new Eligibility and Enrollment (E&E) system. She assisted in mapping the criterion to system requirements and test cases in preparation for required system demonstrations as criterion evidence set forth by the Centers for Medicare & Medicaid Services (CMS). MaryLou also developed a reusable checklist to help other states prepare for operational readiness reviews (ORR) and the final certification review (CR) based upon CMS regulations and guidelines as they apply to certification requirements for an E&E system.
To help promote project success, MaryLou created and organized a comprehensive project documentation repository to help maintain over 1,000 documents. In her role on this project, she also prepared and oversaw the development of the monthly status report deliverable and participated in weekly project status meetings.
- **Massachusetts (MA) Health Insurance Exchange (HIX) and Integrated Eligibility System (IES) Entities**
 - *IV&V Services (03/2013 – 09/2019)*
The MA HIX/IES project focused on enhancing HIX/IES to establish a fully integrated system for determining eligibility for a variety of state-funded health and human service programs, which included Medicaid and Qualified Health Care Programs (QHP). As an IV&V analyst and project coordinator, MaryLou provided critical supporting data for findings and recommendations in the IV&V Monthly Assessment report. She developed and maintained dashboards and report templates for tracking planned requirements vs. requirements delivered. In addition, she monitored and reported on risks and issues, including analysis of the stability of the HIX/IES production system, review and tracking of planned system

integrator contractual system requirements vs actual requirements delivered, and analysis of active workarounds needed to operate the solution. She supported the BerryDunn contractual deliverable review and submission process, as well as the IV&V deliverable review and comment management effort for all of the IV&V resources. She participated in weekly meetings related to CMS Blueprint testing, test case verification for CMS scenario results, and submission of testing results to CMS for approval. She has experience with IBM Rational Quality Manager (RQM), IBM Rational Requirements Composer (RRC), and ALM automated testing tools (e.g., Selenium). In addition, she coordinated and conducted User Acceptance Testing, recorded test results, provided testing metrics, and requirement traceability reports.

Town of North Reading (04/2011 – 05/2013)

MaryLou worked for the Town as a Board of Selectmen transcriptionist. She attended board meetings, for which she documented meeting minutes.

Homeland Security FEMA (02/2011 – 11/2011)

MaryLou held multiple positions with FEMA, including working as a logistics supply chain management system specialist. In this position, she was responsible for Total- Asset- Visibility (tracking temporary housing units shipped to and from staging areas), helping to ensure proper time arrival of commodities, providing reports as needed to upper management, helping to ensure all employees received the accounts required to complete their mission (email, network, database), helping to ensure mission information and tools were provided to all, providing accountably report daily to management, ordering office and field supplies as needed, receiving temporary housing units for flood applicants, inspecting two to three bedroom housing units to ensure FEMA standards and specifications were met, helping to ensure all forms were filled out before releasing housing units to applicants, and supporting JFO Staff procuring materials needed to support applicant process in a timely manner.

Espresso Plus Inc. (02/2003 – 04/2009)

As a service manager for the Repair and Installation of Restaurant Beverage Equipment, MaryLou oversaw daily operations of service department. This included providing daily support to Director of Operations and Sales Department, helping to ensure positive customer relations to all aspects of the company, providing input and coordinated process for implementing the Mass90 service module, and documenting and training all service technicians on new process and procedures.

GENUITY (Formerly GTE Internetworking, Formerly BBN) (1988 – 2002)

MaryLou held multiple positions with GENUITY.

Supervisor, Desktop Services

International Company of 5,000 Employees. MaryLou managed operational teams responsible for implementation and support services, implemented Service Level Agreements for all Desktop Services, led teams in rolling out sales force automation tool (Siebel), selected to review Siebel project for upper management and saved the company \$2,000,000.00, managed

rollout of CCM (Comprehensive Client Management) to all employee desktops/laptops, and implemented Fast-Start program for Account Creation team to enable new employees to be up and running with needed access the day of employment.

Supervisor, IT Helpdesk

As a supervisor, MaryLou managed Helpdesk Staff responsible for daily operations of customer call center, worked as a major contributor to implementation of Vantive ticketing system, and helped to ensure all processes and procedures were documented.

IT Helpdesk Analyst

MaryLou provided services to a 1,500-employee company base and was a major contributor to implementation of HD ticketing system.

Susan Chugha, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in Business Management, Belmont Abbey College Prosci® Certified Change Management Practitioner (CCP) Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Susan is a manager for the Government Consulting Group (GCG) who brings over 19 years of project management experience. During the past eight years, Susan has honed her expertise on policy and Medicaid program efforts in various roles, including program manager, project manager, business analyst, and project coordinator. She focuses her time and experience on 1115 waiver demonstrations, multiple years of experience with the Medicaid Information Technology Architecture (MITA) State –Self-Assessment (SS-A) report and road map activities, business process improvement, data quality initiatives, project, and program management.

Experience**BerryDunn (10/2015 –present)**

Susan works within BerryDunn's Medicaid Practice Group (MPG) and project highlights include the following:

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

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

- *Substance Use Disorder (SUD) Waiver Initiative Project Phase V (10/2016 – present)*

Susan manages the current ongoing phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducts deliverable review on all documents. She performs research on SUD services, Centers for Medicare & Medicaid (CMS) requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on time for federal submission. During this most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

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

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

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

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

- *Data Improvement Project (DIP) Phase 3 (12/2019 – present)*

Susan was the project manager for the DIP Phase 3 project. Susan was responsible for providing oversight to the project team on the day-to-day activities, handles meeting facilitation, peer review and monitors progress with all deliverables tracked against the agreed-upon schedule that will address data quality and usability issues identified within the Medicaid program.

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

As program manager, Susan oversees the project and BerryDunn team that

handles updates to State Plan sections, attachments, supplements, and develops amendments.

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

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

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

- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 – present)*
Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.
- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) Phase IV (09/2018 – present)*

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

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

- *Certified Community Behavioral Health Center (CCBHC) SPA Project Phase II (11/2023 – present)*

As program manager for the CCBHC SPA Project Phase II, Susan oversees the project team through oversight, project management, budgeting, and monitoring risks and issues. Susan has supported the project manager with meeting facilitation duties, client relations, assisted in the development of the provisional certification status application, and contributed to the reviews and scoring sessions of the provider provisional certification applications to help identify providers that would be awarded provisional certification as a CCBHC provider type.

- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Projects I and II (07/2021 – 11/2023)*

Serving as program manager, Susan oversaw this project and provided 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, Susan participated in writing and planning assistance for the "State Planning Grant for Qualifying Community Based Mobile Crisis Intervention Services" planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community based mobile crisis intervention services. Susan's project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.

- *CCBHC SPA Project (09/2022 – 8/2023)*

As program manager for the CCBHC SPA Project, Susan was responsible for oversight of the project team, assisted with project management, tracked the project budget, and monitored any risks and issues.

- *OD Services Project (05/2022 – 11/2023)*

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

- *Provider Enrollment Application (PEA) Project (02/2017 – 11/2017)*

Susan provided project coordination assistance by maintaining all the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV PEA process.

- *ICD-10 Transition Planning and Implementation (10/2015 – 02/2016)*

Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

- **Independent Consultant (08/2010 – 10/2014)**

Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.

- **Columbia Management (09/2012 – 10/2013)**

Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules,

coordinate local client events, process monthly expense and activity reports, and complete as needed ad hoc assignments.

- **Evergreen Investments (06/2004 – 05/2009)**

Susan worked as a Project Manager, assisting the Vice President in the Sales and Initiatives Department and served in multiple roles over her duration at the firm. Susan's responsibilities included the following:

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

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

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

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

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

Julie DuPuis, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Master of Public Administration with concentration in Health Care Administration, Western Michigan University Bachelor of Arts in General University Studies, Western Michigan University Fundamentals in Project Management

Overview

Julie is an outcome-driven and analytical leader with 30 years of state government experience providing comprehensive health coverage to a broad range of individuals, leading, and executing Medicaid and related programs, and improving various reporting processes. She has a strong foundation in managed care health delivery systems, including network assessments, financial oversight, compliance, dispute resolution, rate setting, program integrity controls, and automated systems development. Julie is adept at migrating Medicaid Management Information Systems (MMIS) from Legacy to an Enterprise environment.

Experience**BerryDunn (06/2022 – Present)**

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS)**

- o *Medicaid Enterprise System and Enterprise Data Solution projects 02/2022 – present)*

Julie serves the Enterprise Data Solution project as a subject matter expert supporting data profiling, testing, and requirements gathering support.

- o *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, Home and Community Based Services, Incident and Case Management System project (07/2022 – present)*

Julie serves the MES MSP project as a subject matter expert supporting requirements gathering and research support.

Michigan State University (MSU), Institute for Health Policy (IHP), Program Evaluation and Health Services Research (12/2016 – 07/2022)

Julie served as a Data Resource Analyst & Medicaid Specialist to help ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start to finish. This position supported Michigan Department of Health and Human Services programs, university researchers, and other community stakeholders. Julie cultivated

collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted state staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan Department of Health and Human Services, Health Services Data warehouse. She was helpful in formulating responses to Centers for Medicare & Medicaid (CMS) questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, proposal/manuscript development with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.

Michigan Department of Health and Human Services, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (09/2012 – 12/2016)

Julie served as Section Manager for the Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section. She was responsible for making capitation payments for 1.8M Medicaid members with annual expenditures exceeding \$8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Childrens Special Health Care Services, Foster Care and MI Choice (HCBS) populations from Fee-for-Service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined, and enforced standard operating procedures, interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings her team recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members

that were over 135% Federal Poverty Level (FPL). She interacted with the actuary almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

Michigan Department of Community Health Department of Community Health, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (12/1998 – 09/2012)

Julie served as a Departmental Specialist and Senior Analyst/Lead Worker. She developed professionally into a recognized resource serving as the agency expert in several substantial departmental programs. Julie assumed a pivotal role in creating, testing, and implementing the Medicaid Health Plan and other capitated program rates in the Community Health Automated Medicaid Payment System (CHAMPS). Julie developed her position as the lead, responsible in loading and maintaining Michigan's Medicaid managed care programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting, consulting on policy, research and respond to auditor findings, and train new staff. Julie was responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research and calculated preliminary and year-end accrual estimates.

Rick Hayward

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

Overview

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

Experience

BerryDunn (12/2023 – Present)

Rick is a Senior Consultant with BerryDunn's Medicaid Practice Group (MPG), where he supports Bureau of Medical Services (BMS) data governance and Medicaid and CHIP Enterprise Systems (MCES) procurement and planning.

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

WV Bureau for Medical Services (BMS)

- *Data Improvement Project Phase 4 (12/2023 – present)*

Rick lends his expertise to the DIP Phase 4 activities as a subject matter expert (SME). The State has requested BerryDunn provide systems development lifecycle (SDLC) coordination services for the Medicaid and Children's Health Insurance Program (CHIP) Enterprise to assist the Bureau in vendor change management oversight. Rick works closely with the State and vendors to support the State as it works to evaluate, refine, and gather information related to current systems development lifecycle (SDLC) processes and procedures. His work includes assessment of existing processes, procedures, and systems, conducting gap analyses, and drafting and presenting documentation in support of SDLC activities.

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

Rick worked as an Operations Manager with Maine, where he provided oversight of the day-to-day MMIS operations activities of the State's fiscal agent. In this position, Rick addressed system operations, system change management, user acceptance testing, department communications concerning change management, state and federal audit responses, and vendor oversight for the states. His responsibilities include managing issues by leveraging the

change request process, managing multiple system projects, and managing day-to-day operational activities to help ensure claims are processed appropriately to meet the business needs of multiple units. A significant role for this position is holding the vendor accountable to operational system performance standards, defining performance service level agreements (SLAs), and adhering to contractual obligations. Rick also assists in major system procurement and upgrade planning including, but not limited to, defining contract modifications, setting performance SLAs, outreach to other states, system demonstration planning, research on customization carry-forward and discussions with the Centers for Medicare & Medicaid Services (CMS) on upgrade planning and certifications.

Protech Solutions (10/2019 – 04/2021)

Rick leveraged the Protech Good Grid collaboration tool to oversee an implementation of Good Grid in New England to bring disparate groups of service providers and consumers together with non-profits, for-profits, and state agencies. He worked closely with the MPRN (Maine Prisoner Re-Entry Network) and those in recovery to bring consumers and providers together to make a difference and improve outcomes.

State of Maine (09/1996 – 10/2019)

- *Director of Applications (04/2014 – 10/2019)*
Rick supported the IT needs of a Portfolio of 17 state agencies, 200+ applications, and an approximate \$40 million budget leveraging a team of 77 staff in agile software development projects in this position reporting directly to the Chief Information Officer (CIO). His experience included overseeing change management for the IT organization, managing risks, the decommissioning of multiple legacy systems, and management of business and technical requirements related to system changes.
- *IT Manager (04/2005 – 04/2014)*
In this role, Rick supported Medicaid and Human Services systems utilized by the Behavioral Health and Eligibility units including oversight responsibilities, data analytics, deployments of system enhancements, multiple vendor relationship management, and technical and change management team leadership. He also led the state development team during the ACA implementation for the State of Maine partnering with the state DHHS business management to modify the Medicaid Eligibility system to meet federal guidelines for Maine's leverage of and interaction with the Federal Exchange.
- *Systems Team Lead (09/1996 – 04/2005)*
As Systems Team Lead, Rick led projects supporting applications serving DHHS Substance Abuse, Adult Mental Health, and Mental Retardation Bureaus and the two state Psychiatric Hospitals, including a \$5 million Enterprise Information System.

Atlantic Computer Technologies, Inc (09/1986 – 09/1996)

As owner and CEO, Rick focused on all aspects of the business that sold computer hardware and peripherals in a retail setting as well as consulting services to support business customers.

Supreme Slipper Mfg, Inc (09/1983 – 09/1986)

Rick supported manufacturing operations for large shoe manufacturer employing several hundred production and distribution workers.

United States Air Force (11/1972 – 12/1981)

Rick served in the 197th U.S. Air Force as an Inventory Management Specialist supporting aircraft and missile supply needs while stationed at various bases stateside and overseas.

Education and Certifications

AS, Math, Butler County Community College
Maine Leadership Institute (MLI), State of Maine

Marie LaPres, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	<p>Juris Doctor, Certificate in Health Law, De Paul University College of Law</p> <p>Bachelor of Science in Nursing, University of Michigan</p> <p>Registered Nurse, State of Illinois, Active</p> <p>Registered Nurse, State of Michigan, Active</p> <p>State Bar of Illinois</p> <p>Federal District Court, Northern District of Illinois</p> <p>State Bar of Wisconsin</p>

Overview

Marie is a State Medicaid Program subject matter expert with more than 12 years of state government experience with clinical health care and legal practice expertise. She is detail-oriented and achieves results driven outcomes through analytical thinking, decision-making, and problem-solving skills. Marie has experience with implementing innovative strategic Medicaid program initiatives with cross-team collaboration.

Experience**BerryDunn (01/2024 – present)**

Marie is a senior consultant in BerryDunn's Medicaid Practice Group.

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

Department of Human Services, Bureau for Medical Services

- *West Virginia Mountain Health Trust (MHT) Phase 2, (02/2024 - present)*
Marie serves as a Medicaid subject matter expert supporting the department with policy research, development, quality, reporting, and curriculum development.
- *West Virginia Certified Community Behavioral Health Center (CCBHC) Project, (02/2024 – present)*
As a consultant, Marie serves as a subject matter expert supporting the department with policy research, development, and drafting of project deliverables for this initiative which creates a new State Plan

Amendment (SPA) for West Virginia Medicaid to provide coordinated health and behavioral health services.

State of Michigan, Michigan Department of Health and Human Services (03/2011 – 01/2024)

During her time with the State of Michigan, Marie held the following positions:

- **State Administrative Manager (05/2014 – 01/2024)**
Marie planned and directed specialized areas of Medicaid policy development and implementation, including physician services, maternal and infant health, reproductive health, and home visiting program benefits. She was responsible for research and analysis of complex Medicaid program concepts/policies to assure compliance with federal and state legal requirements, and she developed and implemented waiver activities related to the state's Medicaid eligibility expansion, Healthy Michigan Plan Section 1115 Demonstration waiver and policy. Marie planned, convened, and chaired/attended meetings with state managed care organizations, departmental staff, providers, lobbyists, and federal agency staff. She oversaw budget and rate development for Medicaid policy initiatives related to physician services, physician administered drugs, and new program preventive services initiatives. She directly supervised a multi-skilled team, including assigning work, reviewing work products, promoting teamwork, and fostering professional development.
- **Departmental Specialist (03/2011 – 05/2014)**
Marie served as sole staff specialist responsible for statewide Medicaid Policy for physician services benefit, including research, analysis, implementation activities, and budget oversight activities for existing and new policy initiatives. She prepared and maintained policy research documents and presentations and developed and maintained relationships with managed care entities, community stakeholders, and other government agencies. Marie implemented directives from the state legislature and the Governor's office, and she was responsible for policy benefit plan operations and compliance, working with state and federal auditors and legal authorities.
- **Medicaid Utilization Analyst (03/2011 – 05/2014)**
Marie was responsible for research and analysis of complex medical procedures and new technology in relation to recognized standards of clinical practice and current Michigan Medicaid policy coverage for reimbursement determinations. She worked Medicaid payment resolution of suspended claim processing issues and served as medical review resource to Provider Support and other members of the division. Marie conducted claims payment system logic testing for systems enhancement activities.

McLaren Greater Lansing Hospital (12/2001 – 12/2009)

As a registered nurse, Marie was a staff nurse in the inpatient critical care unit, including Surgical Intensive Care Unit and Cardiac Intensive Care Unit. She was responsible for all aspects of nursing care of critically ill patients, including post-surgical, cardiac, and infectious disease care.

Lowery and Associates (07/1998 – 12/2005)

Marie worked as an associate attorney for a civil litigation firm practicing insurance defense of personal injury claims arising from auto-truck accidents. She has experience in assisting with pretrial discovery, document production review, and analysis of medical and insurance documents in preparation for defense at trial.

Hilary Foster Moles, RN, BSN, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Science in Nursing, West Virginia Institute of Technology Registered Nurse Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II) Prosci® Certified Change Practitioner (CCP)

Overview

Hilary, a registered nurse, is a senior consultant in BerryDunn's Government Consulting Group with comprehensive clinical and state agency policy development and analysis experience. Hilary provides project management services for West Virginia (WV) and Puerto Rico. She brings expertise in case management, Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) claims processing. Hilary is a Prosci® Certified Change Practitioner and has 10 years of Medicaid experience.

Experience**BerryDunn (04/2019 – present)**

Hilary serves as part of BerryDunn's Medicaid Practice Group, working with the WV Bureau for Medical Services (BMS) and Puerto Rico Medicaid Program (PRMP) on project management initiatives.

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

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

- *Quality Improvement Initiatives Program Manager (07/2022 – 12/2023)*
As quality improvement initiatives program manager, Hilary provided project support in the areas of process improvement, best practices, and staffing allocations for the PERM, Advance Planning Document (APD) Support, and Medicaid Performance Management and Quality Assurance (MPMQA) Support Services projects.
 - *PHE Support Project (10/2021 – present)*
Hilary is serving as the project manager for the PHE Support Project, to assist WV with the preparing and planning of unwinding activities once the PHE ends. This project includes tracking program flexibilities, assisting with the development of processes and initiatives to rollback current efforts, and supporting all PHE-related activities. Hilary is managing budgets and project deliverables and works closely with the client to help ensure the team meets the project requirements, and

expectations.

- *PERM Project (04/2019 – 12/2023)*

Hilary began the PERM project as a SME, before serving as project and then program manager. As project manager, she managed budgets and project deliverables and worked closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes support throughout all pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for WV, and supporting the MEQC portion of the PERM review.

- *MMIS Fee Schedule and Edit Quality Review (04/2019 – 04/2023)*

Hilary served as program manager as well as a project SME. In previous project phases, she completed analyses of the MMIS configuration of Medicaid benefits, and prior authorization requirements in comparison to Medicaid policy. Additionally, Hilary completed an analysis of telehealth policies to identify opportunities to expand telehealth coverage for WV. She has collaborated with BMS and Gainwell to evaluate claim edits to help ensure the MMIS setup and current processes comply with Medicaid policy and national standards.

- *State Plan Review and Support (SPRS) Project (09/2020 – 01/2021)*

As a business analyst, Hilary worked with the project team to analyze the WV Medicaid State Plan and assist the State to make process and document improvements for long-term policy compliance and sustainability.

- *COVID-19 Emergency Services Sub-Project (03/2020 – 10/2020)*

Hilary supported the project with tracking of federal waivers, WV Disaster Relief State Plan Amendments (SPAs) and other COVID-19 related legislative policy changes. Hilary researched and advised the client of other state policy implementations on a daily basis. She attended weekly Centers for Medicare and Medicaid (CMS) stakeholder calls and advised the client of noteworthy changes to help them stay current with the evolving changes during the PHE.

- **Puerto Rico Medicaid Program (PRMP)**

- *Enterprise Objective Monitoring & Control Services (EOMC) project (03/2023 – present)*

Hilary is serving as the Payment Error Rate Measurement (PERM) lead to support Puerto Rico throughout their pilot PERM review and Medicaid Eligibility Quality Control Unit (MEQC) review.

- **Washington State Health Care Authority (HCA)**

- *Public Health Emergency (PHE) Unwind Project (03/2023 – 12/2023)*

Hilary provided support and subject matter expertise (SME) to the Washington State HCA PHE unwinding project.

KEPRO (09/2015 – 04/2019)

As the care coordinator lead and case manager, Hilary assisted in the development of local medical policies for WV Medicaid. She conducted training sessions for colleagues, providers, and physicians; provided case management to WV Medicaid members; and utilized InterQual

and BMS criteria to determine medical necessity. Disciplines included hospice, home health, rehabilitation, and durable medical equipment.

WV Medical Institute (02/2013 – 08/2015)

As a utilization review nurse, Hilary used InterQual and BMS criteria to determine medical necessity. Disciplines included acute care, imaging, hospice, and home health.

Charleston Area Medical Center (06/2009 – 02/2013)

With Charleston Area Medical Center, Hilary served as a level-II clinical nurse on the Labor and Delivery unit and the Surgical Intensive Care Unit.

Peter Alfrey, MBA, MA, PMP®, CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	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 West Virginia (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.

Amber Davis, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	<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.

Ebony Carter, MS, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	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 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 Advance 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 lifecycle maintenance activities and update MITA related reports.

- *Advance 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 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 ensure milestones were met on time and reviewed all state MMIS systems to 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 1 city in the Medicaid Transportation Grant program for budget requirements and to ensure grantees and providers followed program goals, objectives, and regulations in accordance with CFR and COMAR). She analyzed and evaluated the program for efficiency and effectiveness of health care delivery and health initiatives by participating in routine audits (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.

Crystal Fox, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Prosci® Certified Change Management Practitioner Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Crystal is a technical engineer and systems analyst, and senior consultant in BerryDunn's Government Consulting Group. Crystal brings an abundance of financial system processing and requirements development and analysis experience. Crystal brings knowledge of Medicaid Management Information System (MMIS) financial systems from a technical and business perspective from both her consulting work and her 13 years of experience working at DXC Technology, formerly Molina Healthcare. Crystal has helped clients achieve their project objectives in her roles as a subject matter expert (SME) and business analyst on MMIS operations and implementation.

Experience**BerryDunn (10/2019 – present)**

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS)**

- *WVCHIP Managed Care Organization (MCO) Transition Project (02/2021 – 04/2023)*

Crystal served as the project manager for the MCO Transition Planning project where she assisted the State team in the daily operations and oversight of the MCOs that are transitioning the West Virginia Children's Health Insurance Program (WVCHIP) fee-for-service population to an MCO-based population. In this role, Crystal communicated with the State and Vendor partners regularly, reviewed deliverable documents, analyzed enrollment reports, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remained compliant with federal and State regulations.

- *People's Access to Help (PATH) DDI Project Management (08/2020)*

Crystal served as a project SME for the Financial Management and Flexi financial module reviews by providing insight on the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.
- *Child Welfare Initiatives Project Management Services (06/2020 – 08/2020)*

Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract request for proposals (RFP) for the Bureau for Children and Families' child placing

agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.

WV Bureau for Medical Services (BMS)

- *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*
Crystal serves as a SME for the APD Consulting Services project where she supports the strategic planning of APDs. In this role, Crystal 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.
- *Payment Error Rate Measurement (PERM) Project (10/2019 – present).*
Crystal serves as a SME for the PERM project. Crystal focuses on validating data processing and eligibility errors, researching error remedies, and providing recommendations for resolution of PERM errors cited for WV in an effort to reduce the error rate, which affects the federal match the State receives.
- *WV BMS, CHIP, Out-of-Pocket Maximum (MOOP) Project (02/2021 – 10/2023)*
Crystal served as the project manager for the MOOP project where she assisted the State team with the planning activities for the MOOP solution. In this role, Crystal communicated with the State and Vendor partners, reviewed deliverable documents, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remains compliant with federal and State regulations.
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) (02/2021 – 05/2022)*
Crystal served as a project SME and research analyst researching various States Medicaid Module implementations and contracts. Crystal served on a team analyzing Vendor Request for Information (RFI) responses to provide estimated outcomes for the MES MSP teams Strategic Plan presented to the State.
- *Fee Schedule Edit Quality Review (10/2019 – 04/2023).*
Crystal served as a project SME. Crystal reviewed documents and information compiled from policy as well as claim-related stored procedures and desk-level procedures (DLPs) to help ensure compliance with the State Medicaid Plan and State Medicaid provider manuals. Crystal also performed multi-state analysis of telehealth policies to identify opportunities for WV to expand covered services, reviewed the current MMIS configuration to support the Medicaid National Correct Coding Initiative (NCCI) editing, and reviewed MMIS system configuration to identify where the system does not match the current State Plan or Medicaid policy. Crystal also developed a research summary that provides the client with the findings of the review and recommendations to remediate.
- *APD Assistance (06/2020 – 08/2020)*
Crystal served as a business analyst for MMIS APD development and updates by updating expenditures and budget based on the previous prior requests in an effort to calculate a request for the current and upcoming years.
- *Enterprise Program Management Office – COVID-19 Waivers and Flexibilities (03/2020 – 06/2020)*
Crystal served as a business analyst by researching the waivers and flexibilities implemented under the Coronavirus Aid, Relief, and Economic Security (CARES) Act during the public health emergency. Crystal prepared summaries or tracking documents based on the research findings, which was incorporated into

presentations presented to the client by project leads.

- *Mountain Health Promise (MHP) Implementation Project Management Support (12/2019)*

Crystal served as a project SME. Crystal supported the Operational Readiness Review (ORR) by performing secondary evidence review for the Financial Management section to help ensure that scoring, determinations, and findings were complete, accurate, and corroborated.

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

- *Forensic Accounting/Auditing (04/2023 – 12/2023)*

Crystal serves as a lead for claims analysis of claims processes and procedures and potential program integrity risks and review of payment activity post reimbursement to providers. Crystal provides analysis of findings to provide process recommendations for process improvements and timely detection and prevention of fraud waste and abuse.

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

- *Colorado Department of Health Care Policy & Financing (HCPF)'s Recovery Audit Contractor (RAC) Program (08/2023 – 03/2024)*

Crystal serves as a project SME providing research assistance to evaluate the design and operation of HCPF RAC program for compliance with applicable federal requirements. Crystal reviews other states' RAC programs policies and State Plans to identify program features in comparison to the Colorado program.

- **Puerto Rico Medicaid Program (PRMP)**

- *Enterprise Objective Monitoring and Control (EOMC) RFP Development Assistance Services (02/2021 – 05/2021)*

Crystal served as a project SME providing RFP research and development assistance. Crystal gathered example RFPs, Request or Quotes (RFQs), or RFIs from other states, RFP requirements, and Service-Level Agreements (SLAs) to assist with the development of the Puerto Rico MMIS RFP.

- *EOMC Services (08/2020)*

Crystal served as a business analyst for the Medicaid Enterprise Organizational Structure (MEOS) subproject by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

DXC Technology/Molina Healthcare (MMS)/Unisys (04/2006 – 06/2019)

- **Svc Info Developer III (06/2016 – 06/2019)**

Crystal translated business requirements to system functionality; developed use case elaborations and business rules using industry best practices; designed unit test cases to help ensure business rules and requirements are being met; managed changes to base lined system requirements using established project change control processes and tools; and wrote SQL queries to validate data and troubleshoot results where applicable.

- **Medicaid Information Technology Act (MITA) Financial Systems Analyst III (02/2011 – 06/2016)**

Crystal worked with teams to analyze business processes. Crystal designed and documented system functionality using industry standard use cases; specialized in all

phases of financial processes including, but not limited to; Accounts Payable, Accounts Receivable, General Ledger, Claim Payment, 1099 Processing; and managed changes to system requirements using established project change control processes and tools to include, but not limited to Application Lifecycle Management (ALM).

- **Systems Analyst 5-Financial Analyst (04/2006 – 02/2011)**

Crystal created financial reports/processing for clients. Crystal worked closely with the client to understand the business needs and gather requirements/specifications for the project; designed and implemented enhancements/modifications for the HealthPAS-Financial system; performed research and analysis on testing results to help ensure accuracy; and resolved production support issues for the HealthPAS-Financials system as needed.

Sudha Ganapathy, PMP®, Prosci® ITIL (F), CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	<p>Bachelor of Arts in Computer Science, Rutgers University SDNBV College, TamilNadu, India – Major: Chemistry, Minor: Mathematics and Physics</p> <p>Certified Project Management Professional®, Project Management Institute®</p> <p>Information Technology Infrastructure Library (ITIL) Foundation Certification</p> <p>Certified Lean Six Sigma Green Belt (LSSGB)</p> <p>Prosci® Certified Change Practitioner</p> <p>MLC Certified Medicaid Professional (HIT+ MCMP -II)</p>

Overview

Sudha is a project manager with more than 25 years of extensive experience in the Information Technology (IT) areas of development, system analysis, and quality assurance. With over 20 years of experience in Medicaid-related engagements, she has led project teams to help clients achieve their quality assurance objectives on multi-stakeholder and multi-agency projects. She brings a proven record of accomplishment in successfully implementing and maintaining software programs, utilizing PL/I, COBOL, DB2, IMS, various IBM® utility programs, Easytrieve, and SQL, and creating test cases for unit and integration testing and production support. Sudha prides herself on her ability to collaboratively work with clients and vendors (internal and external) to help them better utilize analytical tools and techniques to support project objectives, enhance and/or create new processes to help with testing, and realize opportunities for improvement in their existing processes.

Experience**BerryDunn (07/2015 – present)**

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS)**

- Medicaid Performance Management & Quality Assurance (MPMQA) Phase III (05/2022 – present)*

As the Project Manager on the MPMQA project, Sudha is responsible for coordinating the quality assurance activities related to Medicaid. She worked with the last project manager to finalize the Statement of Work (SOW) and governance documents and worked on the Advance Planning Document (APD) for 2023.

Sudha submitted the SOW for MPMQA Phase III, which was approved for May

2023 – June 2024. She collaborates with the functional, testing, and certification teams on the PATH project to gather the information necessary to present in the MPMQA status report. She also collaborates with other teams such as Enterprise Data Solution (EDS) as necessary to gather information for the MPMQA status report that is sent to the Bureau for Medical Services (BMS) Deputy Commissioner monthly.

- *People's Access to Help (PATH) Integrated Eligibility Solution (IES) Project Management (10/2019 – present)*

Sudha supports the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DoHS program service systems into a single enterprise. As a Project Management Organization (PMO) and System Integration Test (SIT) lead, Sudha creates, reviews, and provides input on project testing deliverables, coordinates project activities, and assigns and oversees team assignments for 8-10 consultants. In addition, Sudha helps this project achieve its objectives by collaborating with the vendor, Optum, and DoHS to assist with User Acceptance Testing (UAT) scenario development and testing related activities.

Sudha is the lead for the Child Support (CS) release and supports the multiple user interface maintenance release(s). As a lead, she collaborates with Optum on the requirements coverage, release schedule, and deliverable activities related to testing. Sudha assigns and oversees team activities such as test scenario/test case/test results reviews, communicates with Optum on the findings, and approves the responses from Optum.

- *Recipient Automated Payment and Information Data System (RAPIDS) (Eligibility System) Transition Facilitation Project (02/2016 – 05/2016)*

Sudha assisted with the RAPIDS transition facilitation project and identified and documented risks/issues prior to the transition of RAPIDS from Deloitte to Optum. She also assisted with tracking Project Change Requests (PCRs) and creating reports to capture the aging of the defects and reviewed and provided feedback on process documents such as the Incident Management Report and Problem Management Report.

WV Bureau for Medical Services (BMS)

- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (07/2015 – 08/2016)*

Sudha assisted with UAT for BMS' MMIS re-procurement in the Medicaid Information Technology Act (MITA) business area of Provider Management. She reviewed and helped modify the Doc Matrix, the primary document that drove the Provider Enrollment web portal options based on provider types.

- **Massachusetts HIX/IES Entities**

- *IV&V Services (07/2016 – 09/2019)*

Sudha served as the BerryDunn IV&V testing lead for nine end-to-end project release cycles. In this role, Sudha interfaced with the State and Optum

counterparts to provide deliverable quality oversight and process improvement guidance and enforced program and project best practices in Project Communication, Integration, Quality Management and Risk Management per the Project Management Body of Knowledge (PMBOK®). For ongoing releases, she assessed the test coverage and execution against plan and the PMBOK® best practice, as well as monitored defect management practices against plan and the best practice accepted by similar industries and monitored planned versus delivered requirements by release. In case of discrepancies, she helped ensure the findings were reported via the monthly IV&V assessment report and logged as issues and risks in JIRA® if the discrepancies warranted further and immediate remediation efforts. For an alternate project for the same client, Sudha also played a key role in developing a new JIRA® Implementation and Requirements Management Plan. She worked with the MassIT analysts to analyze existing ALM/JIRA® data elements and define them in the new JIRA® instance.

XEROX – Government Health Solutions/Cognizant Technology Solutions (2012 – 2015)

As a functional lead for Montana MMIS, Sudha collaborated with the Montana Department of Human Services (DHS) business analysts to define and enhance the online Provider Enrollment portal. As a team lead for the Architecture and Letter related functional areas, Sudha defined Quality Assurance (QA) Strategy, estimates, and roadmaps with on-site and offshore working models. Additionally, she created and executed test cases, analyzed, and reviewed written test cases, and created and conducted various knowledge transfer sessions as needed. She conducted triage meetings as necessary with the functional team, development team, and QA team to identify and rectify defects and complete testing activities as per schedule.

Affiliated Computer Services, Inc. (ACS) (2007 – 2012)

Sudha worked as a systems consultant senior analyst and provider team subsystem lead for the Alaska MMIS. The position involved analyzing business use cases, user interface specifications, and user requirement specification documents to create effective test scenarios and test cases. Additionally, she conducted online training to team members and provided statistics and reports to management as required; and created and executed quality test plans, test cases, and test scripts to comprehensively validate the functionality components of the Provider/Security Subsystems using Rational tools.

UNISYS (2000 – 2006)

Sudha supported the Louisiana MMIS, converting several Easytrieve programs to COBOL and successfully promoting them to production. She was a member of the Medicaid Eligibility Determination System (MEDS) enhancement team, responsible for the modification and testing of several Management and Administrative Reporting Subsystem (MARS) programs to accommodate new recipient processing files. She conducted testing and provided QA support to the testing team within critical staffing and time constraints. She partnered with team members in formulating their test cases to help ensure testing was conducted and completed on time. In addition, she led Acceptance Testing for McKesson HBOC ClaimCheck project in

the project leader's absence, helping to ensure required tests were completed successfully in a timely manner.

Liz Vose, MPA

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

Overview

Liz is a Senior Consultant with a strong understanding of state government oversight of Medicaid managed care compliance. She has 11 years' experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid initiatives.

Experience**BerryDunn (02/2022 – present)**

Liz is a senior consultant with BerryDunn and has served as a Program Manager for State procurement projects that span procurement of Asset Verification Systems, Medicaid Enterprise Systems, and Incident Case Management Systems. Project work includes:

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

- **WV Department of Human Services (DoHS) (07/2022 – present)**

- *WV Mountain Health Promise (MHP) Re-Procurement Project (07-2022-09/2023)*
Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
 - *WV Mountain Health Trust (MHT) Re-Procurement Project (07/2022-06/2023)*
Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
 - *WV Mountain Health Trust Phase II (11/2023- present)*
Liz serves as the Medicaid Project Manager and Managed Care SME
 - *WV Legislative Implementation Assistance Project (LIAP) (09/2023-10/2023)*
Liz served as the Medicaid Project Manager.
 - *WV Certified Community Behavioral Health Center Project (CCBHC) (06/2023- present)*

Liz serves as a Medicaid Managed Care SME working to create a new State Plan Amendment for WV Medicaid to provide health and behavioral health services.

- *WV Substance Use Disorder (SUD) Waiver Initiative Project Phase V (05/2023- present)*

Liz serves as a Medicaid Managed Care SME for the project designed to make Pre-Release services available to individuals released from incarceration or jail under an 1115 waiver authority.

Mercer Government Human Services Consulting (04/2019 – 05/2021)

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

NYS Office of Mental Health (12/2013 – 03/2019)

- *Acting Deputy Director, Division of Managed Care (10/2018 – 03/2019)*
Liz supported the Associate Commissioner for the Division of Managed Care in overseeing behavioral health managed care operations spanning analytical, policy, stakeholder engagement, and compliance workflows.
- *Director of Compliance and Communications (05/2015 – 03/2019)*
Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including but not limited to public presentations, road shows, social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She liaised with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Interim Deputy Director prior to departure.
- *Project Manager (12/2013 – 04/2015)*
Liz managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked, and risks were communicated to executive staff as well as the Governor's office.

SUNY Albany (09/2011 – 12/2013)

Liz served as a Budget Analyst to manage Income Fund Reimbursable (IFR) accounts with net worth of \$9 million U.S. dollars. She conducted fiscal analyses including running quarterly projections and year-end activity reconciliation for a variety of accounts and funds and worked with account managers to identify and resolve fiscal inconsistencies.

HAVE Inc. (04/2007 – 08/2009)

Liz served as Accounts Payable Manager to process invoices, present payable activity to CEO, and manage credit card reconciliation process.

New York & Company (09/2002 – 08/2005)

Liz served as an Assistant Buyer responsible for skirts business. She monitored sales activities against projected on a daily, weekly, quarterly, and annual basis and presented findings to CEO. She also worked closely with design, sourcing, and marketing to help ensure trend right silhouettes hit the stores on time and generated targeted revenue.

Alex Tannenbaum

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Science in Business, Clemson University

Overview

Alex is a Senior Consultant in BerryDunn's Medicaid Practice Group. He brings six years of project, resource, and client management experience to the group. Alex's positive energy, excellent organization and communication skills, and professionalism nicely complements his current work on the People's Access to Help (PATH) eligibility and enrollment project, where he is the Project Manager responsible for providing project management organization services.

Experience

BerryDunn (09/2020 – present)

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

WV Department of Human Services (DoHS)

- *People's Access to Help (PATH) (09/2020 – present)*

Currently Alex is the Project Manager for a large-scale, system implementation project directly impacting four State agencies in West Virginia. Alex oversees a 40-person team, managing a service approach for the PATH project which includes oversight, monthly project reporting, project management support, requirements management, deliverable management and review, federal review and certification support, testing support, organizational change management (OCM) support, and project closeout.

Alex is also the lead for the project's multi-program Implementation Advance Planning Document (IAPD). In addition to submitting narrative updates for the IAPD, Alex is also responsible for updating the project's Cost Allocation Methodology (CAM), which follows the International Function Point Users Group's (IFPUG) Function Point Counting Practices Manual.

Previously, Alex served the Internal PMO Manager, where he was responsible for the management of the following work streams: Project Schedule, Project Scope, PMO Tool Management, Monthly Status and Readiness Reporting, Budget, Deliverables, Compliance, System Security, Certification, Issues, Risks, Action Items, Assumptions, Decisions (IRAAD), Audits, Project Resources, Internal Governance, and Project Communications.

Prior to these roles, Alex was the lead resource coordinator, managing the day-to-day coordination of the PMO team. Alex had a variety of responsibilities, some of which included conducting daily meetings for team organization, providing

oversight of the daily project coordination activities, developing process flows, prioritizing, and scheduling meetings to ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service Level Agreements (SLAs), managing project Requests for Information (RFIs), and helping to ensure vendor accountability and adherence to SLAs.

- *WV Advance Planning Document (APD) Consulting Services*

- **State of Iowa**

- *ELIAS Phase 1 Assessment (01/2024 – present)*

TEKsystems Inc. (06/2016 – 09/2020)

- ***Enterprise Account and Relationship Manager (06/2017 – 09/2020)***

Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of Traditional Software Development (SDLC and Agile), Cloud Enablement, Data Analytics, DevOps & Automation, and Digital Experience. Industries supported included Healthcare (Medicaid, IES, EMR, and Insurance), Pharmaceutical/Life Science, and State/Local Government.

Alex was responsible for securing business with new accounts to provide IT Project-based Services and IT Staffing Services and to Life Science and Pharmaceutical clients. This includes engaging new and existing customers through phone calls and meetings to promote TEKsystems as a valued partner for IT services such as deliverable-based professional services, workforce planning, and staff augmentation. He identifies new customers within a sales territory through research and networking to expand TEKsystems business opportunities; secures high-value accounts through consultative selling, effective customer solutions, and compelling business opportunities; and negotiates contracts and integrate contract requirements with business operations.

He was also responsible for relationship management, building relationships with clients to truly understand their business and analyze service growth opportunities. This has included leading the implementation of strategic business plans to address the needs of the customer to position TEKsystems as a service provider.

Sarah Vintorini

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Science, Business Administration/Marketing, West Virginia State University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT+ MCMP II)

Overview

Sarah is a senior consultant with BerryDunn's Medicaid Practice group, bringing extensive experience with complex project coordination and oversight, thoughtful meeting facilitation, and effective communication skills to projects. Sarah has a long-proven track record in marketing, communications, and community development with cross-functional organizations of all sizes. Sarah is a skilled senior consultant with strong organizational and interpersonal communication skills and demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Sarah lends invaluable expertise related to the development, delivery, and maintenance of key project documents and helps support engaging and productive relationships with clients as well as vendors.

Experience**BerryDunn (11/2019 – present)**

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

WV Department of Human Services (DoHS)

- *People's Access to Help (PATH) DDI Project Management (12/2019 – 03/2021)*
Sarah provided project coordination, tracked action items, and monitored project risks and issues. Additionally, Sarah assisted the cross-functional team in various project areas, including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (12/2021 – present)*
As an experienced business analyst, Sarah supported the project with the creation and review of deliverables and monitored the project schedule and action items. Sarah worked closely with the client and vendors on both internal and client deliverables to maintain and strengthen the project's reporting processes. Sarah helped to provide strategic direction on the best approach for monitoring vendor performance and strengthening vendor relationships.

WV Bureau for Medical Services (BMS)

- *Medicaid Enterprise System (MES) (03/2020 – 08/2021)*
Sarah provided business analyst support and deliverable review and development

for MES. Sarah developed the As-Is environment deliverable as well as supported the development of the To-Be environment deliverable. In addition, she developed graphics and presentations to support the project.

- *Provider Management Support (PMS) (11/2019 – 08/2021)*
Sarah provided project coordination, deliverable development and review support, and monitored risks and issues related to all sub-projects within PMS. Sarah was involved in the facilitation of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, developed lessons learned, and identified opportunities for leverage and reuse. She assisted in developing a comprehensive outreach plan to educate and engage direct care workers and enroll each worker in the State's Medicaid Management Information System (MMIS).
- *Electronic Visit Verification (EVV) (11/2019 – 06/2023)*
Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues. Sarah helped BMS with the release of their EVV Request for Proposal (RFP), coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of West Virginia's EVV solution.
- *Mental Health (MH) Parity Compliance Report (04/2020 – 08/2020)*
Sarah provided project coordination support, monitored project risks and issues, and assisted with deliverable development of West Virginia's MH Parity Compliance Report. She coordinated meetings with Managed Care Organizations (MCOs) and helped to gather documentation for accuracy related to Fee-for-Service (FFS) and pharmacy claims.
- *Mountain Health Promise (MHP) Implementation Project Management Support (01/2020 – 06/2020)*
Sarah provided project coordination support, deliverable review and creation support, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.
- **Alaska Division of Health Care Services (HCS)**
 - *MMIS Solicitation Consultant Services (09/2020 – present)*
Sarah helped develop and distribute a fact-finding survey to gain input from stakeholders and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Additionally, Sarah assists with the development of deliverables, project presentations, and monitors project action items.

West Virginia Governor's Highway Safety Program (2013 – 2019)

Sarah served as a corporate event planner for the West Virginia Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities included securing over \$150,000 annual sponsorships, a tradeshow of over 30 vendors from across the country, securing nationally

acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event.

Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

KISRA (2012 – 2018)

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

Terrell Ellis & Associates (2003 – 2007; 2009 – 2012)

As a senior program manager, Sarah managed a variety of non-profit and governmental accounts providing services including, but not limited to, fundraising, marketing and outreach activities, meeting facilitation, grant writing and special events. She was responsible for seeking out and securing new clients, client relations, sales, fundraising, strategic planning, meeting facilitation, grant writing, and special events.

The Salvation Army (2001 – 2003)

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

Robert Haughton, PhD, PMP®, CSM

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	<p>Doctor of Philosophy in Management, Information Systems Management, Walden University</p> <p>Master of Project Management, Keller Graduate School of Management</p> <p>Bachelor of Science in Engineering Technology, University of South Florida</p> <p>Project Management Institute (PMI) Project Management Professional (PMP®)</p> <p>Certified Scrum Master (CSM) – Scrum Alliance</p>

Overview

Robert is a senior consultant within BerryDunn's Medicaid Practice Group (MPG) bringing over 19 years of progressive experience delivering technology enhancements, including managing, and analyzing workflow processes. Robert provides impact through project oversight from the concept stage through solution delivery and integration. He helps to ensure team understanding of relationships, dependencies, and the impact of neighboring business functions. Robert is a servant leader with high emotional intelligence to help ensure understanding of the perspective of others and provide the support needed to meet goals and build a sense of team community. He has supported the implementation of Medicaid Management Information Systems (MMIS) for the Georgia (GA) Department of Community Health (DCH) and Alaska Department of Health & Social Services (AKDHSS).

Experience**BerryDunn (07/2018 – present)**

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

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

- *Advance Planning Document Consulting (APD) Project (5/2023 – present)*

As a Senior Consultant, Robert provided consulting services to support the state of West Virginia Department of Human Services (DoHS) in the planning, developing, and managing the APD funding process. He led the effort to develop new APD templates tailored for BMS for future submissions, streamlining the process.

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

- *People's Access to Help (PATH) DDI Project Management (07/2018 – present)*

As a PMO Subject Matter Expert (SME), Robert is supporting the project activities related to the WV PATH program to consolidate and integrate DoHS program

service systems into a single enterprise. Robert reviewed project testing deliverables for User Experience (UX1) Client Portal release, helping to ensure accuracy and compliance with client expectations. The reviews increased testing efficiency by 35%. He also collaborated with five agencies within DoHS to create User Acceptance Testing (UAT) scenarios for the UX1 release. Robert facilitated meetings with key agency personnel and developed test scenario templates to create over 250 UAT scenarios.

Robert currently serves as a Technical SME supporting the development and testing of interfaces, data conversion, and migration for the WV PATH program. He collaborates with the vendor, Optum, and DoHS to review project deliverables across two major releases reducing rework by 10% and increasing knowledge transfer efficiency by 25%. Robert led a team implementing the new National Electronic Interstate Compact Enterprise (NEICE) interface resulting in cost savings of 35% and increased business process efficiency for the Bureau of Social Services (BSS). He also managed the effort to engage in discussions with over 20 internal and external vendors and DoHS to conduct end-to-end interface testing across the Child Welfare (CW) and Child Support (CS) releases.

Meridian Technologies (09/2016 – 12/2017)

As a senior consultant under contract to BlueCross BlueShield of South Carolina, Robert managed the testing management of eight business/operational efficiency improvement projects for the Tri-Care health care program. He developed formal test plans for desktop and web applications based on business requirements and technical specifications. Robert collaborated with the applications team to develop and test a technical solution that increased the customer user experience for Tri-Care services by 40%. He also led a team in the development of several system design and functionality improvements, resulting in a 45% increase in business and operational efficiency metrics.

Office of the Fulton County District Attorney (2015 – 2016)

Robert was an IT systems manager, responsible for providing desktop support for over 100 workstations and email and systems support within the District Attorney's office. He worked closely with attorneys to streamline operational procedures and increase job efficiency by 45% for the attorneys and legal assistants in the office. In addition, he managed all staffing for a special project updating the final judicial dispositions in the Georgia Crime Information Center (GCIC) criminal history database using historical data to improve record and reporting accuracy statewide.

Cognizant Technology Solutions (2013 – 2015)

As a Senior Quality Assurance Lead, Robert led the successful testing of 80 outstanding defects for the Reference and Prior Authorization subsystems for the Alaska MMIS implementation reducing processing time and increasing system reliability. He also led a team of four offshore consultants responsible for testing over 300 test cases related to the Recipient Eligibility subsystem for the Montana MMIS system implementation project.

Xerox Corporation (09/2005 – 07/2013)

- *Senior Quality Assurance Lead (07/2010 – 07/2013)*

Robert managed a team of five onshore and offshore testers responsible for the creation and execution of 500 test cases for the new Recipient Eligibility subsystem in the Alaska MMIS implementation project. He worked with the development team to review the business processes within the Recipient Eligibility subsystem ensuring increased testing efficacy. Robert was also responsible for managing software defects to improve software quality and reliability by 65%. He maintained a metric dashboard for weekly status reporting in product defect review meetings to establish priority regarding product backlogs and software product defects. Coached, counseled, and conducted annual performance appraisals for team members.

- *Senior Software Developer (09/2005 – 07/2010)*

Robert represented the Georgia Medicaid Management Information System (GAMMIS) project during the annual Government Healthcare Solutions Disaster Recovery exercise. In this, he was responsible for running a simulation of a claims adjudication and financial reporting process. He performed all aspects of the full software development life cycle to include requirements gathering, analysis, design, development, testing, implementation, and maintenance. He also designed new batch processes increasing claim adjudication efficiency by 65% and modified existing batch reporting processes for the Georgia Medicaid Health Check program to increase reporting efficiency by 50%.

Nycole Washington

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	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 lifecycle 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.

Julie Bandy

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

Overview

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

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

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

WV Department of Human Services (DoHS)

- *Medicaid Enterprise System (MES) Home and Community Based Services, Incident and Case Management System (ICMS) project (12/2022 – present)*
Julie serves the ICMS project as a subject matter expert supporting requirements gathering, design, and research support. Directed streamlining of forms and processes for ICMS.
- *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (03/2023 – 12/2023)*
Julie served the CSEDW project as a subject matter expert supporting waiver design and research. Responsible for creation and revision of policy to correspond to updated waiver application.
- *Advance Planning Document (APD) Support Project (07/2023 – present)*
Julie serves the APD project as the ICMS subject matter expert supporting updates to that portion of the APD, and as a team member drafting portions of the overall document as needed.
- *Mountain Health Trust (MHT) Phase II (02/2024 – present)*
Julie serves as a subject matter expert supporting the development of training and oversight materials.
- *Legislative Implementation Assistance Project (LIAP) (07/2023 – 09/2023)*
Julie served the LIAP as a subject matter expert in the creation of a plan to implement legislatively required updates to the prior authorization requirements and processes in fee-for-service and managed care landscape. She was responsible for interpretation of requirements, identifying gaps in current system, and research support.
- *Data Improvement Project (DIP) (03/2023-06/2023)*

Julie served the DIP as a subject matter expert, supporting the project manager with project management duties including development and review of materials.

Indiana Family and Social Services Administration (03/2011 – 12/2022)

Julie served as a Youth Provider Specialist, Medicaid HCBS subject matter expert, and ICMS product owner for the Division of Mental Health and Addiction's Child Mental Health Wraparound 1915 (i) SPA from 05/2013 to 12/2022. From 03/2011 to 05/2013, Julie served in the Office of Medicaid Policy & Planning as a Care Select Reporting Analysis, a Reporting Manager for Care Programs, and a Division of Disability and Rehabilitative Services (DDRS) Waiver Policy and Compliance Specialist. In each of these roles, she was responsible for Medicaid compliance, reporting, and program support to the operators of Medicaid funded programs.

Arbitre Consulting, Inc (06/2008 – 06/2010)

Julie served as an Evaluator with Inventory for Client and Agency Planning (ICAP) Assessments and worked on determining Level of Care (LOC) for Indiana Medicaid Waiver programs. She conducted ICAP assessments and health/behavioral appendix as well as serving as a member of reevaluation team for assessments needing additional review.

Jacobs Home, Inc (12/2005 – 10/2007)

Julie served in multiple roles at Jacobs Home, a Medicaid approved and enrolled 501c3 agency providing residential and community supports for adults with autism and other developmental disabilities.

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

Sycamore Rehabilitation Services (06/2003 – 11/2005)

Julie served in multiple roles at Sycamore Services, a CARF accredited, 501c3 agency providing Medicaid funded home and community-based support services to adults with autism and other developmental disabilities

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

Independent Case Management (03/2002 – 06/2003)

Julie served as a Targeted Case Manager for individuals receiving Medicaid 1915 (c) waiver services transitioning from State operated facilities.

Professional Assessment of Indiana, Inc. (04/2000 – 10/2001)

Julie served as a Diagnostic and Evaluation Individuals with Developmental Disabilities (IDD) Clinician to determine level of care eligibility for individuals seeking or receiving Medicaid funded services in group home and waiver settings.

Adam Bowman

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

Overview

Adam is an experienced IT security professional, who brings a background supported by 12 years in the United States Air Force. Adam is a consultant in BerryDunn's Medicaid consulting practice. He brings four years of project management experience after working in the testing, functional, technical, and resource management areas of West Virginia's People's Access to Help (PATH) Project.

Experience**BerryDunn (10/2019 – present)**

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS)**

- PATH DDI Project Management (10/2019 – present)*

Adam is currently fulfilling the internal Project Management Office (PMO) lead for the PATH project. He oversees resource management, change management, and the deliverables team. He is also utilizing his programming skills to support PATH Maintenance and Operations (MandO), Advance Planning Document (APD) Project, and the WV Engagement Improvement initiative. Adam is also the point of contact for all Issues, Risks, Action Items, Assumptions, Decisions (IRAAD).

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

United States Air Force (03/2012 – present)

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

research of technologies and advises commanders on associated risks and mitigation factors in conjunction with meeting requirements. He currently holds a Top Secret / SSBI / OPM security clearance.

Adam previously supervised a team of seven radio operators that provided support for over 50 paramedics and nurses in deployed locations, took Executive Member Committee (EMC) Meeting minutes, served as a member of the squadron and wing level Company Grade Officer (CGO) Council, and completed over 1,000 hours of coursework while attending Undergraduate Cyber Training.

Ruchman and Associates Inc. (3/2018 – 10/2019)

Adam supported the FBI's Criminal Justice Information Systems Division by performing criminal records retrieval services. He is entrusted to complete required work in a timely and accurate manner in an unsupervised setting while being responsible for physical security of assigned work laptop.

CMS Insurance (10/2011 – 09/2018)

As the IT Director, Adam planned, budgeted, and purchased the IT system in its entirety. This included configuring cloud storage and email services, maintaining physical computers for employees across multiple states, keeping essential software accessible and up to date, and troubleshooting day-to-day issues.

Alexandra (Alex) Glowacky, CAPM®

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Arts in Sociology, Colby College (summa cum laude) Project Management Institute (PMI) Certified Associate in Project Management (CAPM®)

Overview

Alex is a highly motivated senior consultant with the Medicaid Practice Group, with interests and experience in policy analysis, program development, and stakeholder engagement processes. She has worked on a range of Medicaid policy projects, bringing experience with 1115 Demonstration waivers, the State Plan and associated State Plan Amendment (SPA) work, 1915c waivers, planning grants, and regulatory analysis and compliance. She has extensive knowledge in social systems and offers an adaptive project management skillset. Her strong communication skills paired with organizational strategies developed through work at community organizations, enhance her leadership and project management knowledge base. She is an experienced moderator and facilitator and has worked with varied groups of stakeholders throughout her career, including State Medicaid agencies, State partner agencies, and federal partners.

Experience**BerryDunn (07/2021 – present)**

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

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

- *Technical Assistance and Project Support (TAPS) Phases IV and V (05/2022 – present)*

As project manager, Alex has provided oversight of subprojects and task requests approved and executed under the TAPS project umbrella. This includes coordinating and tracking task requests and subproject submission and approval processes, coordination with project leads on project status as a TAPS subproject and creating and delivering all TAPS project reporting documentation. Alex also coordinates and leads research and tasks that fall under the scope of TAPS, such as the review and impact analyses of Centers for Medicare & Medicaid Services (CMS) rules and other federal guidance relevant to Medicaid.

- *State Plan Review and Support (SPRS) Project Phases II and III (01/2022 – present)*

As the project manager for the SPRS project, Alex assists with the management of activities related to the State Plan, including but not limited to drafting and development of SPAs and associated packages, regulatory compliance, and advisory council engagement. She additionally supports the State team working on State Plan submissions, tracking active SPAs and working closely with BMS to help ensure SPAs move forward in public notice, submission, negotiation, and approval processes.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2021 – present)*

As project manager, Alex assists the State with activities specific to the development, implementation, and oversight of SUD waiver services in WV. Her focus at present is supporting the State as BMS prepares to negotiate the SUD 1115 waiver renewal and expansion application, working on federal negotiation and stakeholder engagement efforts in preparation for the implementation of the renewal. She additionally supports the State's tracking of waiver monitoring and evaluation activities for the demonstration. Prior to leading the project, Alex served as deputy project manager and a research analyst.

- *Advanced Planning Document (APD) Support Project (10/2022 – 12/2023)*

Working on the APD Support Project, Alex supported the project management of APD development to help ensure the State gets necessary funding for MITA aligned initiatives. Alex has contributed to the creation of several APDs, most recently having worked on the Medicaid Management Information Systems (MMIS) APD update.

- *American Rescue Plan (ARP) Section 9813: Mobile Crisis Grant Project (08/2021 – 08/2022)*

As project coordinator and a policy analyst for the ARP Mobile Crisis project, Alex assisted the State in planning for the implementation of the Medicaid mobile crisis services program. She conducted program coordination among involved stakeholders, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the SPA draft for submission to CMS.

- *Children with Serious Emotional Disorder (CSED) Waiver Phase III Project (07/2021 – 06/2022)*

As a policy analyst for the CSED Waiver Project, Alex provided policy research and synthesis support for the State's initiative and contributed to the creation and revision of deliverables such as Waiver amendments, CMS Evidence Requests, and stakeholder engagement documentation.

Civic Engagement and Community Partnerships Committee (01/2021 – 07/2021)

Alex worked as a student advisor to collaborate in assessing and strengthening working relationships between Colby and local community organizations, developing and implementing engagement-building initiatives. She served as an ambassador for experiences focused on civic learning and democratic engagement.

Farnham Writers' Center (09/2018 – 07/2021)

Alex worked as a head tutor, writing fellow, and tutor to provide support for students and professors of writing-oriented courses, orchestrating opportunities for students to improve their writing skills. She maintained and enhanced the organization's social media presence on three media platforms. As Head Tutor for campus outreach/community events, she advocated for the organization as a resource, coordinated and ran staff meetings, and advised staff tutors.

Cambridge Women's Center (Winter 2019)

Alex worked as a resource and research intern to investigate and network with other local social service organizations in order to update and revitalize the organization's resource guides. She trained in providing emotional support and relational assistance to trauma survivors.

Jonathan “Jon” Watkins

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

Overview

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

Experience

BerryDunn (10/2021 – present)

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

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

- *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 – 11/2022)*
Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon’s work helped to ensure the State had a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.
 - *WV Public Health Emergency (PHE) Support Project (12/2021 – 12/2022)*
Jon provided project coordination and monitored project risks and issues to assist the WV DoHS with temporary flexibility that provides services to different beneficiaries during PHE. Jon’s work helped to keep the client informed and helped ensure the project met its goals and objective.
 - *WV Certified Community Behavioral Health Clinic (CCBHC) (11/2023 – 12/2023)*
Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV CCBHC Project when needed. Jon’s work helped to keep the client informed and helped ensure the project meets its goals and objectives.

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

- *Mountain Health Trust (MHT) Re-Procurement Project (03/2022 – 07/2023; 11/2023 - present)*
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of MCO procurement activities for MHT. Jon’s work will help to ensure the State has a comprehensive RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 – present)*
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MES MSP Project. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.
- *WV Mental Health Parity Project (01/2022 – 02/2023)*
Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.
- *WV Peoples Access to Help (PATH) (11/2023 – present)*
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the WV PATH Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

CAMC General Hospital (01/2021 – 11/2021)

Jon worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing, and customer service. In addition, he organized the day-to-day needs of the unit and performed basic bookkeeping duties.

Greenhills Country Club (05/2012 – 12/2020)

Jon worked in administration to schedule and organize golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day-to-day bookkeeping duties, and invoicing.

Jackson County 911 (01/2020 – 12/2020)

Jon worked as a dispatcher to receive and dispatch all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.

Krista Clay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Psychology, Marshall University Collaborative Institutional Training Initiative (CITI) Program: Social and Behavioral Responsible Conduct of Research, Credential ID 45589043 CITI Program: Social / Behavioral / Epidemiological Research Investigators, Credential ID 45589023

Overview

Krista is an experienced staff consultant with a broad scope of administrative, software, and management skills. She has demonstrated success in prioritizing client needs and deliverables, effectively balancing numerous projects at once with strong organizational and time management skills to maintain productivity and communicating clearly with others to break down complex ideas and resolve problems. Krista currently serves as a consultant working with West Virginia's (WV) Department of Human Services (DoHS) and Bureau for Medical Services (BMS), supporting State clientele with the project coordination/consulting of various Medicaid projects by maintaining work schedules, organizing shareholder meetings, conducting relevant project research and analysis, and helping to ensure deliverables and Service Level Agreements (SLAs) are met.

Experience

BerryDunn (11/2023 – present)

Krista is a consultant with BerryDunn's Medicaid Practice Group (MPG).

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

Krista's role as a consultant for these projects includes maintaining continuous coordination and communication with project managers for scheduling meetings, managing agendas, action items, meeting notes, and correspondence, as well as researching the latest data and resources for updated information within each project. She assists with other items such as monthly status reports, news roundups, Centers for Medicare & Medicaid Service (CMS) reporting, Commissioner Briefing (CB) reporting, and project trackers.

WV Department of Human Services (DoHS)

- *People's Access to Help (PATH) Project*

WV Bureau for Medical Services (BMS)

- *Payment Error Rate Measurement (PERM) Reporting Year 2023 (RY2023) Phase II*
- *Substance Use Disorder (SUD) 1115 Waiver Project Phase V*

- *Data Improvement Project (DIP) Phase 3*
- *DIP Phase 4*
- *Public Health Emergency (PHE) Support Phase II*
- *Medicaid Information Technology Architecture (MITA) AA-A Annual Update 2021*
- *WV Technical Assistance and Project Support (TAPS) Sub-projects*
- *Mental Health Parity and Behavioral Health Support Project*
- *American Rescue Plan (ARP) Community Based Mobile Crisis Services Phases I & II*
- *ARP Home Community Based Services (HCBS) Implementation*

TEKsystems (11/2022 – 11/2023)

Krista worked as a project coordinator, supporting State Medicaid and Human Resources Program clientele with the coordination of various projects by maintaining work schedules, organizing shareholder meetings, conducting relevant project research and analysis, and helping to ensure deliverables and SLAs were met.

Altis Movement Technologies (05/2022 – 07/2022)

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

American Campus Communities (01/2019 – 08/2020)

- *Senior Leasing Agent/Community Coordinator (01/2019 – 08/2020)*

Krista was responsible for over \$700,000 in the company's leasing sales. She planned meetings, organized schedules, and calendars, and provided updates on current resident/prospects. Krista was responsible for completing large volumes of leasing paperwork and oversaw the signing of leasing documentation. She managed administrative work to smooth new resident move-in processes, planned marketing and outreach strategies to consistently bring in new leasing prospects, and quickly addressed student and residential problems to avoid escalation and keep the residential environment peaceful and welcoming. She adhered to fair housing standards to help avoid any legal issues and help prevent discriminatory practices and tracked leasing inquiries and vetted prospects with leasing systems to stay organized and efficient against leasing targets. Additionally, Krista organized events to engage residents and build a keen sense of community, met with board of directors to discuss community needs and resolve issues or disputes, and conducted 50+ showings per week to convert prospects into qualified residents.

- *Social Media Ambassador (08/2019 – 08/2020)*

Krista participated in and created social media content for the leasing office's Instagram, Facebook, and TikTok. She engaged in the ideation and creation of different giveaways and other marketing strategies and completed contract work with the company as an ambassador.

YUM! Brands (09/2016 – 01/2018)

Krista served as Shift Manager in charge of cash drawer drops and preparing daily bank deposits. She trained new team members to adhere to company policies and service standards in addition to mentoring on job-specific skills. Krista was instrumental in the opening of a new franchise in WV.

Kourtney Kirk

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Science in Business Administration, Glenville State University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Kourtney is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of Statements of Work (SOW) and project budgets. She has a proficiency in customer resource management systems, such as the Microsoft and Atlassian Suites. Kourtney has a history of working in data analysis, graphic design and advertising, event planning, and communication and sales. She has strong leadership skills, the ability to work under pressure and deadlines, and confidence in speaking, working on a team, and understanding new concepts.

Experience

BerryDunn (10/2022 – present)

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

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

- *People's Access to Help (PATH) Eligibility and Enrollment Implementation Assistance (10/2022 – present)*

- **WV Bureau for Medical Services (BMS) (08/2020 – 01/2022; 10/2022 – present)**

- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 – 01/2022; 10/2022 – present)*
 - *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (08/2020 – 01/2022)*

As a project coordinator for People's Access to Help (PATH), the Enterprise Data Solution (EDS), and MCES projects, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the

lead coordinator for the EDS Project, she assists in the creation and maintenance of Advance Planning Documents (APDs), project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the Project Management Office (PMO), client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

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

As the lead coordinating consultant, Kourtney assisted with facilitating meetings between PMO, State, and vendors, and developed and distributed meeting materials. Additionally, she was responsible for creating monthly status reports and project deliverables, tracking action items and decisions, and helped ensure adherence to the project timeline and sensitive documentation and communication needs.

TEKSystems (08/2020 – 01/2022)

Kourtney served as a project coordinator, supporting WV engagement projects.

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

- *Business Development Representative and Scheduling Coordinator (08/2019 – 08/2020)*
Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AE's to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.
- *Business Development Representative (03/2018 – 11/2018)*
Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and managed client relationships.

Total Quality Logistics (11/2018 – 08/2019)

Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily

shipments and confirmed pickup and delivery of shipments. She communicated proactively customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glenville State University (08/2012 – 12/2017)

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

Adam “AJ” Mong, MEd

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	Master of Education, Lancaster Bible College & Graduate School Bachelor of Science, Lancaster Bible College & Graduate School Devereux Safe and Positive Approaches Trainer Certification

Overview

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

Experience**BerryDunn (07/2022 – present)**

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *Mountain Health Promise (MHP) Re-procurement project (07/2022 – present)*
AJ serves the MHT Re-procurement project providing business analysis and project coordination support.
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2022 – present)*
AJ serves the MES procurement project providing business analysis and project coordination support.
 - *Incident and Case Management (ICMS) Procurement project (08/2022 – 3/2024)*
AJ served the ICMS procurement project by providing business analysis and project coordination support.
 - *Mountain Health Trust (MHT) Re-procurement project (09/2022 – 10/2023)*
AJ served the MHT Re-procurement project providing business analysis and project coordination support.

Lingle Avenue Elementary School (08/2021 – 07/2022)

AJ served as an Elementary School Counselor to provide character education curriculum to students while serving as the School Assessment Coordinator for statewide standardized testing. He delivered staff training for security compliances and worked with stakeholders to remove barriers to student learning.

Frederick Douglass Elementary School (FDES) (09/2013 – 06/2020)

AJ served as an Elementary School Counselor with the School Leadership Team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that would lead to measurable systemwide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

Elizabethtown Area School District (12/2012 – 06/2013)

AJ served as Long-Term Substitute for an Elementary School Counselor to provide individual & small group counseling, conducted gifted academic screening, and partnered with other counselors to implement a holiday giving program to provide families with meals during the holiday seasons.

Union School District (02/2012 – 05/2012)

AJ served as a Long-Term Substitute for an Elementary School Counselor to conduct classroom guidance lessons and facilitated a peer partnership program for elementary students.

Hershey Entertainment Complex (05/2005 – 08/2013)

AJ served as Supervisor to lead over 200 employees, including other supervisors, to help operate and maintain the daily procedures and staffing for over a dozen facilities in the HersheyPark Food and Beverage Department. He provided staff training and evaluation, maintained daily inventory and ordering, and tracked labor to help offset cost deficits. AJ also developed individual inspection manuals for all locations, addressed customer service issues and complaints, and resolved them in a manner consistent with the company's values.

Matthew Oatten

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Arts in Communications, Michigan State University

Overview

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

Experience**BerryDunn (07/2022 – present)**

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

WV Department of Human Services (DoHS)

- *Medicaid Enterprise System (MES) Purchasing Contract Management Support Subproject (07/2023 – present)*

Matthew is currently serving as the project lead for the subproject focused on process improvement activities for the State. The project will assist in streamlining purchasing processes, research and development of best practices, and will also aid the State in meeting several of its identified purchasing goals.

- *MES Modernization Strategy and Procurement (MSP) Project (07/2022 – present)*

Matthew serves the project by providing business analysis and project coordination support. Matthew provides support to the MES team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. He also assists in the development, organization, and process flow of requirements for Joint Requirement Planning (JRP) sessions with the State.

- *Enterprise Data Solution (EDS) Project (07/2022 – 02/2024)*

Matthew serves the project by providing business analysis and project coordination support. Matthew provides support to the EDS team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. He also assists in the development of deliverables for contractual obligations such as advanced planning documentation, statements of work, monthly status reports, and project closeout summaries.

Concentra Health Services (01/2019 – 07/2022)

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

Michigan State University (MSU) (08/2018 – 01/2022)

Matthew worked as Assistant Cheer & Dance Coach to co-manage operations of a D1 athletic team of 80 co-ed athletes. He assessed athlete performance while providing training to develop skill sets in compliance with NCAA and MSU Athletic Department safety protocols. He facilitated travel sporting, marketing, and community events to engage athletes, donors, and fans nationwide.

Michigan State University (03/2014 – 05/2017)

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

Nolan Cyr, MA

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

Overview

Nolan is a highly dependable and innovative consultant with experience in both organizational development and Medicaid. He has extensive knowledge of organizational systems and culture, data collection and analysis strategies, and training design, development, and implementation. 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 platform's learning management system (LMS), course content, and technical support. In this role, Nolan spearheaded the redevelopment of the platform's 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

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	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.

- *Advance 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

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	MBA, University of Charleston BS, Communications, West Virginia State University

Overview

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

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 West Virginia (WV)**

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

- *Advance 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

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Paraprofessional
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	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.

- *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.

WV Bureau for Medical Services (BMS)

- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance Annual Update Assistance Project (07/2023 – present)*

Katie assists with MITA lifecycle 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.

- *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 fourth 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

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	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

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

Overview

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

Carole Ann Guay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Lead Project Coordinator
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	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**

- *Enterprise Objective Monitoring and Control (09/2023 – present)*
- Carole Ann assists with review and updates of deliverables.

- **Ellis County, 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, 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), TN**

- *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

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

Overview

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

Experience**BerryDunn (07/2017 – 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.

Jonathan “Jon” Williams

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

Overview

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

Megan Hamilton, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	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

Proposed Project Role	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	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 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.

Jordan Ramsey, MA, LSSGB

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	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.

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	Schedule of APDs	Schedule of APDs submission and related activities
04	APD Submission Packages	<p>APD Submission packages per APD, up to 25. The APD submission package will be developed in compliance with requirements, including but not limited to, 45 CFR 95.610. Each submission package includes:</p> <ul style="list-style-type: none"> • Supporting Email Summary • Transmittal Letter • APD Narrative • MDBT • Consolidated MDBT • Current MITA SS-A Report
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
BMS	Bureau for Medical Services
CFR	Code of Federal Regulations
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
MDBT	Medicaid Detailed Budget Tables
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
USVI	United States Virgin Islands
WV	West Virginia


Keyword Search

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

Simple Search

Search Editor

☐ Any Words 

☐ All Words 

☐ Exact Phrase 

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc"

x

Entity

▼

Location

▼

Status

▲

☒ Active

☐ Inactive

Reset 



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BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information			
Business Purpose	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)		Capital Stock
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years	Par Value		

Authorized Shares	Young Entrepreneur	Not Specified

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

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

DBA			
DBA Name	Description	Effective Date	Termination
BERRY DUNN	TRADENAME	3/21/2011	

BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	
DBA Name	Description	Effective Date	Termination Date

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Monday, June 3, 2024 — 8:51 AM

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