



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: 05-22-2024

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 BMS2400000046 1	Procurement Folder:	1435723
Document Name:	Medicaid Information Technology Architecture (MITA) 3.0	Reason for Modification:	
Document Description:	Medicaid Information Technology Architecture (MITA) 3.0		
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 24 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount: \$763,640.00

Purchasing Division's File Copy

CH 6/13/24
PURCHASING DIVISION AUTHORIZATION
DATE: *Tamara* 6/4/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: *6/5/24*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid Information Technology Architecture (MITA) 3.0 State Self- Assessment (SS-A) Annual Update (AU) 2022 Project

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

Total: \$763,640.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$17,200.00
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

Lead Project Manager: 80 hours @ \$215 = \$17,200.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$10,800.00
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

Engagement Manager: 40 hours @ \$270 = \$10,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$651,240.00
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

General Project Manager: 3,618 hours @ \$180 = \$651,240.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$84,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-15	2025-06-14				

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

Extended Description:
 Project Management Support Staff: Optional Renewal Year One

Hourly Rate: \$80.00

Support Staff: 1,055 hours @ \$80 = \$84,400.00

May 3, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for the Medicaid Information Technology Architecture (MITA) 3.0 State Self- Assessment (SS-A) Annual Update 2022 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:

Nicole Y. Becnel

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Nicole Becnel
Principal
681-313-8905

*Ok
Althea Greenhowe*

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

Medicaid Information Technology
Architecture (MITA) 3.0 State Self-
Assessment (SS-A) Annual Update (AU)
2022 Project

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, PMP®, Principal

palfrey@berrydunn.com

Submitted On:

May 3, 2024

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Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) Medicaid Information Technical Architecture (MITA) 3.0 State Self-Assessment (SS-A) Annual Update (AU) 2022 Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) and the Bureau for Medical Services (BMS) with the assessment and analysis for the annual MITA update report. The work completed under Medicaid Information Technical Architecture (MITA) 3.0 SS-A Annual Update (AU) 2022 Project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and 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 the State of West Virginia BMS in meeting compliance with the requirements of the MITA 3.0 SS-A as prescribed by the Centers for Medicare & Medicaid Services (CMS). This work is a continuation of MITA SS-A AU work that the State originally began in 2009.

The MITA 3.0 SS-A AU 2022 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 2.0 – Minimize risk and maximize value from contracted services and products
- Gen 3.0 – Leverage technology to enhance performance and decision-making
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations
- Gen 5.0 – Ensure Program Quality
- Gen 6.0 – Enhance and improve efficient, effective, and meaningful outreach and communication

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Cynthia Beane (Commissioner, BMS) as the Project Sponsor and Sarah Young (Deputy Commissioner, BMS) as the State 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 the Engagement Manager (EM), Emily McCoy as the Lead Project Manager (LPM), and Ebony Carter serving as the Project Manager (PM).
- This work will begin upon approval of this SOW and 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 BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening 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 Advanced Planning Document (IAPD) for the purposes of this SOW. CMS previously approved the MMIS IAPD on February 27, 2024, for total State and federal funds in the amount of \$95,085,478 under project identifier WV-2024-01-08-MMIS-IAPDU-MITA. The estimated cost of the services to be delivered under this SOW is \$763,640 (included in the approved Advance Planning Document [APD]); therefore, any additional scope added to the services to be provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management activities to be delivered under this SOW.

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 D11: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Nicole Becnel</p> <p>Emily McCoy</p> <p>Peter Alfrey</p> <p>Ebony Carter</p>	89
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. 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"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings 	<p>Emily McCoy</p> <p>Ebony Carter</p> <p>Susan Chugha</p> <p>Azba Hotelwala</p> <p>Hailey Holden</p> <p>Katie McDonald</p> <p>Cate Poling</p> <p>Kourtney Kirk</p> <p>Shandia Benke</p> <p>Jordan Ramsey</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p>	180

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Timeline <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 D11: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Emily Hendrickson Janine DiLorenzo Jon Williams Megan Hamilton KD Dobyne</p>	
3.0	<p>MITA 3.0 SS-A Annual Update Assistance</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following tasks to assist with activities that will prepare for the submission of the MITA 3.0 SS-A AU 2022.</p> <p><u>Research and Assessment</u></p> <ul style="list-style-type: none"> Update MITA templates for the annual update documentation via the MITA database Collect information on ongoing projects, including evidence of system and process improvements for the business processes Assess and document the business processes that have been identified Conduct internal and external stakeholder fact-finding sessions, as needed, for each business process to understand: <ul style="list-style-type: none"> Current business process environment Data flows Desk-level procedures (DLPs) Systems access Staff expectations Updates to be made, if applicable 	<p>Emily McCoy Susan Chugha Ebony Carter Tom Hunter Kevin Chartrand Dorothy Ball Cynthia Taylor Dawn Webb Nycole Washington Amber Davis Crystal Fox Jeff Stoddard Jim Strassenburgh Katie McDonald Azba Hotelwala Hailey Holden Cate Poling Kourtney Kirk Shandia Benke Jordan Ramsey Alycia Minshall Caitlin Cabral</p>	4,464

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Identify changes from the TO-BE environment in the 2021 SS-A AU report to the As-Is environment in the new MITA 3.0 SS-A AU 2022 report Update business process forms and capability matrices Complete and analyze scorecards, business profile reports, and performance measures to determine process improvements for each architecture and the Seven Conditions and Standards within each business process Revise the MITA SS-A AU report, road map, gap analysis, business process summary documents, and the concept of operations documents, including subject-matter expert (SME) review of all documents Update the Data Management Strategy (DMS) and Technical Management Strategy (TMS) reports, recording all updates to gaps, activities, and solutions identified Validate findings with BMS leadership, capture changes, follow up on action items, revise assessment for the final version, and obtain approval Deliver training and MITA related materials for BMS new hires upon request. Assist with database modernization and maintenance efforts. Develop Visio Process Maps, as needed <p>Deliverable(s)</p> <ul style="list-style-type: none"> D04: MITA 3.0 SS-A AU 2022 Report D05: MITA Roadmap D06: Scorecards D07: DMS D08: TMS D09: Copies of all assessment files, in an agreeable format D10: Visio Process Maps, as needed <p><i>Completion Criteria</i></p> <p>All parties will deem the MITA 3.0 SS-A AU 2022</p>	<p>Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Megan Hamilton KD Dobyne</p>	

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	Annual Update Assistance phase complete upon successful completion of the project and acceptance of D11: Project Closeout Summary by the project sponsor or their designee.		
4.0	<p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the alignment of the APD to the MITA framework.</p> <ul style="list-style-type: none"> Provide enterprise wide MITA support for ongoing system and business process improvement projects, including reviewing and updating each APD to help ensure MITA goal alignment. Provide MITA IAPD-U tracker updates <p><i>Completion Criteria</i></p> <p>All parties will deem the APD Support phase complete upon successful completion of the project and acceptance of D11: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Ebony Carter Susan Chugha Nycole Washington</p>	30
5.0	<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 BMS at project close. Additionally, the Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D11: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will deem the Project Closeout phase complete upon successful completion of the project and acceptance of D11: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Ebony Carter Susan Chugha Emily McCoy Azba Hotelwala Jordan Ramsey Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Megan Hamilton KD Dobyne</p>	30
Total Hours			4,793
Total Not-To-Exceed Cost Estimate			\$763,640

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: EM (\$270/hour)
- Commodity Line 8: LPM (\$215/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	40	\$10,800
8	LPM	\$215	Emily McCoy	80	\$17,200
11	GPM	\$180	Peter Alfrey	41	\$7,380
11	GPM	\$180	Ebony Carter	750	\$135,000
11	GPM	\$180	Susan Chugha	120	\$21,600
11	GPM	\$180	Dawn Webb	20	\$3,600
11	GPM	\$180	Tom Hunter	335	\$60,300
11	GPM	\$180	Kevin Chartrand	335	\$60,300
11	GPM	\$180	Nycole Washington	600	\$108,000
11	GPM	\$180	Dorothy Ball	720	\$129,600
11	GPM	\$180	Cynthia Taylor	400	\$72,000
11	GPM	\$180	Amber Davis	65	\$11,700
11	GPM	\$180	Crystal Fox	65	\$11,700
11	GPM	\$180	Jeff Stoddard	120	\$21,600
11	GPM	\$180	Jim Strassenburgh	47	\$8,460
12	SS	\$80	Azba Hotelwala	600	\$48,000
12	SS	\$80	Katie McDonald	80	\$6,400
12	SS	\$80	Hailey Holden	60	\$4,800
12	SS	\$80	Cate Poling	24	\$1,920
12	SS	\$80	Kourtney Kirk	24	\$1,920
12	SS	\$80	Shandia Benke	24	\$1,920
12	SS	\$80	Alycia Minshall	27	\$2,160
12	SS	\$80	Caitlin Cabral	27	\$2,160
12	SS	\$80	Carole Ann Guay	27	\$2,160
12	SS	\$80	Emily Hendrickson	27	\$2,160
12	SS	\$80	Janine DiLorenzo	27	\$2,160

1

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Jon Williams	27	\$2,160
12	SS	\$80	Jordan Ramsey	27	\$2,160
12	SS	\$80	Megan Hamilton	27	\$2,160
12	SS	\$80	KD Dobyne	27	\$2,160
Total				4,793	\$763,640

4.0 Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month #	EM	LPM	GPM	SS	Est. Hours Per Month	Est. Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	4	7	284	92	387	\$61,065
Month 2	3	7	285	83	378	\$60,255
Month 3	3	6	283	81	373	\$59,520
Month 4	3	6	279	81	369	\$58,800
Month 5	3	6	279	81	369	\$58,800
Month 6	3	6	279	81	369	\$58,800
Month 7	3	6	279	81	369	\$58,800
Month 8	3	6	278	81	368	\$58,620
Month 9	3	6	277	80	366	\$58,360
Month 10	3	6	276	80	365	\$58,180
Month 11	3	6	273	80	362	\$57,640
Month 12	3	6	273	77	359	\$57,400
Month 13	3	6	273	77	359	\$57,400
Total	40	80	3,618	1,055	4,793	\$763,640

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												13
	1	2	3	4	5	6	7	8	9	10	11	12	
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 MITA 3.0 SS-A Annual Update Assistance													
4.0 APD Support													
5.0 Project Closeout													



BerryDunn Authorized Signature

As a principal of this firm in our Government Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to 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:
Nicole Y. Bechel
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5/3/2024

Signature

Date

BMS 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 WV overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

Experience

BerryDunn (06/2010 – present)

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

- **State of WV**
 - *Lead Manager (2012 – present)*
 - *MCO ORR Assistance (09/2020 – 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review Project: Phase III (06/2020 – 11/2020)*
 - *MHT MCO Procurement Assistance Project: Phase II (05/2020 – 09/2020)*
 - *SUD Waiver Initiative Phase 4 (04/2020 – 05/2021)*
 - *MHP Implementation (Coordinated Care Management) (03/2020 – 06/2020)*
 - *MCO Transition: Phase II (03/2020 – 02/2021)*
 - *SPRS (02/2020 to 05/2021)*
 - *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)*
 - *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)*
 - *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)*
 - *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)*
 - *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 HIE APD Assistance (03/2016 – 04/2017)*
 - *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
 - *Medicaid E&E 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 Design, Development, and Implementation (DDI) and Certification (07/2015 – 12/2016)*
 - *Medicaid E&E APD (06/2015 – 09/2015)*
 - *PPACA Workgroup Oversight (2012 – 2015)*
 - *5010 System Refresh (2012 – 2015)*
 - *HIT Statewide Strategic Plan development (2012 – 2014)*
 - *Provider Enrollment (2012 – 2015)*

- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*

WV DoHS

- *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 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.
- *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, RFP draft narratives and supporting documentation efforts, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.
- *IES/PATH Procurement Support and 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, CHIP, SNAP, TANF, LIEAP, Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (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, 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.

- *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.
- *WVCHIP ORR (12/2019 – 10/2020)*
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from FFS to Managed Care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to Managed Care. The team developed unique and tailored findings reports for each MCO and prepared an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *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 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.
- *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 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 HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT planning assistance, operational readiness assessment assistance, and post implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 – 06/2011)*

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject-matter knowledge and support.

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

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

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

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

- **Project Manager for MIHMS Provider Enrollment**

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

- **WV MMIS**

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all 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

Emily E. McCoy, RN, BSN, PMP®

Proposed Project Role:	Lead 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 MMIS. Her clinical experience includes direct care nursing for individuals within an inpatient behavioral health environment (including substance use and eating disorders), neurology unit, and skilled nursing/long-term care setting. Emily also has several years of program management, project management, and leadership for both hospitals and state health and human services agencies.

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

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

- **State of WV**

WV DoHS

- *E&E Implementation Assistance (01/2018 – present)*

Emily is currently the deputy project manager within the State Project Management Office (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 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.

- *EPMO Project (11/2019 – 10/2020).*

Emily served as the project manager for the WV 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 WV 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 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 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, APD support, 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 WV 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.

WV 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

WV BMS (01/2003 – 10/2013)

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

- *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.

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 (LSSGB) 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 WV DoHS BMS, Peter brings comprehensive knowledge about health plan operations, process improvement, procurements and vendor management, and best practices that support Medicaid and health and human services client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives, and policy initiatives.

Experience**BerryDunn (03/2014 – present)**

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

- **State of WV**

- **WV DoHS, BMS, and West Virginia 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:

- *MHT Phase II (12/2023 – present)*
- *Incident and Case Management System (ICMS) Procurement Assistance (02/2023 – present)*
- *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 ORR (02/2019 – 06/2020) and MHP Re-Procurement (10/2021 – 09/2022)*
- *WVCHIP ORR (09/2020 – 01/2021)*
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 – present)*
- *WVCHIP OOP Maximum (05/2021 – present)*
- *IES/PATH DDI Project Management (08/2018 – 11/2019)*
- *SUD Waiver Initiative Project (07/2017 – 03/2019)*
- *AVS Project Management Services and Procurement Assistance (04/2017 – 02/2018)*
- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 – 12/2016)*

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

- PHE 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, 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)**

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

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

Martin's Point Health Care (12/2008 – 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 multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and 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 PMO lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.

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 MPG, assisting the WV BMS program

- **State of WV**

- **WV BMS**

- *PERM (04/2022 – present)*
Ebony is serving as a project SME for the PERM Project. In this project, Ebony is responsible for reviewing Data Processing (DP) request for more information, and validating DP errors.
 - *Fee Schedule Edit Quality Review Phase V (04/2022 – 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.
 - *PHE Support Project (03/2022 – 06/2022)*
Ebony assisted with tasks related to the PHE project.
 - *PERM APD (08/2022 – 01/2023)* Ebony assisted with tasks related to updating the APD document.
 - *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 HIT report, MITA lifecycle maintenance activities and update MITA related reports.

- *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 WV MES MSP Project.

- *MES MSP Project (09/2023 – present)*

Ebony serves as a MMIS SME on the WV MES 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 DP SME with CMS to provide technical direction and guidance to the DP 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 DP 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 Code of Federal Regulations (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 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 FFS and Managed Care claims according to Medicaid CFR and state regulations under the PERM Project. She researched, analyzed, interpreted, and applied provider Medicaid enrollment, recipient eligibility (CHIP and Medicaid), risk-based screening, and claims processing, CFR and state regulations when conducting audits of state claims. Ebony created operating procedures for navigating state MMIS systems, managed workflow through State Medicaid Error Rate Findings (SMERF) system and used the SMERF system, State MMIS, and eligibility systems to conduct audits. Ebony communicated with CMS about impediments that impede the team's ability to complete audits accurately and on time.

Maryland Department of Health and Mental Hygiene (DHMH) (07/2008 – 08/2015)

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

leadership and Medical Assistance Transportation guidance to state legislatures during conferences and workshops, and provided guidance on Managed care or Medicaid FFS 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.

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 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 MPG and project highlights include the following:

- **State of WV**

- WV BMS**

- *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 sub-contractors. Her responsibilities include oversight of the team, budget, and time management, and peer review and delivery of required deliverables. She assists with the development of the update of the HIT report, DMS report, and the 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.

- *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 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.

- *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.

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- *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 DDI 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 (on-boarding, 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 on-boarding 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.

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

Proposed Project Role:	General 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, WV 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>LSSGB Certification</p>

Overview

Dawn is a manager in BerryDunn's MPG, providing leadership and project management to WV'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 APDs.

Experience

BerryDunn (08/2017 – present)

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

- **State of WV**

- **WV 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, PERM, and TPL 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)*

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- *Data Improvement Project (09/2019 – present)*
 - *PHE Support (12/2021 – present)*
 - *SUD Waiver Initiative Project (07/2017 – present)*
 - *Provider Management Support (11/2019 – present)*
 - *SPRS (02/2020 – present)*
 - *MCO EDQ Project (08/2020 – 02/2022)*
 - *MES MSP Project (7/2021 – present)*
 - *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 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.
 - *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 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 is in compliance with 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 RFP development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
 - **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
 - *Medicaid Organizational and Business Process Redesign (11/2021 – 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.

- **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 frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and 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.

Charles T. "Tom" Hunter, ITIL

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	30+ years
Certifications and Education:	<p>80 Credit Hours in Pascal Programming Language, C++ Programming Language, and Accounting, Morris Harvey College and West Virginia University</p> <p>IBM® Course Work: Telecommunications, Programming, and NT administration and taken technical classes through Computer Associates and New Horizons Computer Learning Center</p> <p>ITIL Foundation Certification</p> <p>Microsoft SharePoint 2010</p>

Overview

Tom is a senior consultant in BerryDunn's Government Consulting Group. He has 30+ years of experience as a Database Analyst (DBA), system designer, computer programmer, analyst, project manager, and trainer in the healthcare and natural gas industries. Tom has strong analytical skills combined with experience in object-oriented programming techniques, database design, and legacy programming languages. He is a team leader competent in complete project cycles, testing, final implementation, and documentation with excellent communication skills.

Experience**BerryDunn (07/2011 – present)**

Tom serves as a consultant as part of BerryDunn's Medicaid Practice Group (MPG).

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

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

- *Medicaid Information Technology Act (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2016 – present)*

Tom joined the MITA project in June 2016 as a business analyst providing database experience and expertise to complete an ACCESS database to store and report business process capability maturity levels for the 2016 SS-A. The project involved restructuring and importing several MS Excel spreadsheets from the 2014 assessment into the database along with validating the results of the imports. "Scorecard" reports to submit the data to the Centers for Medicare & Medicaid Services (CMS) were designed and created along with data entry forms to also record the information through a

graphical user interface. Tom is the Administrator of the MITA Database (DB) and provides guidance and support to the MITA DB users.

- *Project Management of Medicaid Management Information System (MMIS) Procurement, Design, Development, and Implementation (DDI), and Certification (05/2014 – 05/2016)*

Tom joined the MMIS project in May 2014 as a subject matter expert (SME) for the provider enrollment sub-system leading the deliverable review effort of several provider documents for the new system. He also was the lead UAT tester of the Provider's On-line Portal for Provider Enrollment, providing valuable input to the vendor for defect resolution and enhancements.

- *Provider Enrollment (PEA) Project (08/2013 – 05/2014)*

Tom was the lead project manager for this project assisting BMS with weekly status meeting facilitation and reporting. He was the lead UAT tester for BerryDunn, coordinating the BMS resources to provide accurate and prompt testing results on the PEA project. In addition, Tom has critiqued several desk level procedures from BMS' fiscal agent and offered many updates resulting in improvements to their documentation.

- *5010 Refresh Project (10/2011 – 08/2013)*

Tom participated on the Medicaid 5010 Refresh Project as a lead tester and support analyst assisting BMS in several ways. He wrote user documentation for the BMS testers, created MS Excel spreadsheets and SharePoint lists to facilitate defect reporting, and managed the day-to-day UAT efforts at the fiscal agent's office for BMS. He participated in daily triage meetings during UAT and provided valuable assistance with his background in medical claims billing and processing.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (07/2011 – 10/2011)*

Tom worked on the DW/DSS project after joining BerryDunn in July 2011. His initial duties were meeting facilitation and deliverable reviews. His background provided much-needed expertise with the numerous technical documents that were presented as part of the early stages of the project.

- **Hawaii Department of Human Services – Med-QUEST Division**

- *HI MQD BRPASSP Project (04/2022 – present)*

Tom joined the Hawaii project in April 2022 to assist with User Acceptance Testing (UAT) planning and writing UAT scripts for various software releases. In October of 2022, he was tasked with locating an issue tracking product and was instrumental in selecting the Jira™ application. He has implemented the software for Hawaii and is the main administrator and maintains the system daily. His other duties include reviewing Design Specification Documents (DSDs), Business Requirements, Software Release Notes, Release Planning, and UAT Support.

R.L. Laughlin & Co., Inc. (12/2002 – 07/2011)

As an IT DBA, analyst, and programmer for this West Virginia-based natural gas measurement and field services company, Tom provided programming, database design/administration, and system design functions on a variety of platforms and programming languages. He administered MS SQL databases, including transactional replication of production database to off-site backup server; wrote, tested, and debugged ad hoc queries, user-defined functions, and stored procedures; created and maintained tables, including indexes and triggers; developed program specifications and documentation; developed and maintained operational procedures. He has written programs to provide custom file formats and reports; migrated software to a client-server platform; provided new software development and support; and managed teams of software development subcontractors.

Charleston Area Medical Center (CAMC) (09/1992 – 12/2002)

As director of IT from 1992 to 2002, Tom managed the 200+ server data center at CAMC, which had 15 staff and operated 24/7. He also managed the Network and PBX departments (staff of 25) and help desk (staff of 12) during various periods. He participated in IT project management at the department level, attended Six Sigma training sessions, and facilitated management development classes. He was a member of a focus group comprised of hospital managers/employees, physicians, and community members tasked with creating a Health Maintenance Organization (HMO) chartered by CAMC, which became Carelink.

Strategic Ventures, Inc. (SVI) (08/1987 – 09/1992)

As Director of Information Technology, Tom planned and implemented the consolidation of the SVI data center into the CAMC's data center; managed a medical billing department of 15 employees and an IT staff of four, providing IT services to seven corporate entities. In addition, he migrated an IBM® System 36 computer to an IBM® AS/400 system; wrote and maintained RPG programs on AS/400; and planned and implemented the installation of an HP computer to provide computer services to Carelink HMO.

Kevin Chartrand, MBA, CPHIMS, PMP®, SAFe PO/PM

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	16
Certifications and Education:	Master of Business Administration, University of California at Davis Graduate School of Management Bachelor of Science, University of Pittsburgh Project Management Institute (PMI) Certified Project Management Professional (PMP®) Certified Professional in Healthcare Information Systems (CPHIMS) Certified in Information Technology Infrastructure Library (ITIL) Amazon Web Services (AWS) Certified Cloud Practitioner TensorFlow Developer Professional Machine Learning Certification Health Informatics Certification

Overview

Kevin is a seasoned professional within the Health and Human Services and Public Sector Public IT spaces, specializing in strategic planning and business planning related to social services and Medicaid systems projects and initiatives. He brings years of experience in strategy and planning, full lifecycle procurement planning and support including quality assurance (QA) and Independent Verification & Validation (IV&V), requirements development, data management and analytics, financial and competitive analysis, program and project management, and process, benefits, and asset modeling. Additionally, he demonstrates an extensive breadth of knowledge and experience related to web and systems development, operations management, business development, and business case and strategy development for government and commercial IT. Kevin presents with a proven history of demonstrating his familiarity and proficiency across multiple health and human services and Medicaid subject areas, including Centers for Medicare & Medicaid Services (CMS) systems, Streamlined Modular Certification (SMC) systems, MECT/MECL Certification, enterprise strategic planning, solution architecture, design, and governance, Advance Planning Document (APD) and funding request development, and system and module procurement design, development, evaluation and negotiations. Additionally, Kevin keenly applies agile and iterative principles to support critical IT processes, such as full stack web development and machine learning development.

Experience

BerryDunn (02/2024 – present)

As a Senior Manager, Kevin supports BerryDunn's Medicaid Practice Group (MPG) client projects and initiatives.

- **Puerto Rico**

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

- *Medicaid Enterprise System (MES) Program (02/2024 – present)*

Kevin served multiple roles while supporting this project, including Program Management Office (PgMO) Support Director, Solution Architect, Portfolio Advisor, Integrated MES Program Management (IMES) Team Lead, and Outcomes-based Procurement Team Lead. Additionally, he served as a specialist for BerryDunn's support of PRMP's program-based approach to the MES, outcomes lifecycle management, MES roadmap definition and management, and other focus areas. Key elements of these roles included defining PgMO, Executive Steering Committee, and PgMO Support functions; development and maintenance of the MES and Program Management Roadmaps; development of the MES Outcomes Management Plan, tailoring the approach to be outcomes-focused; updating the MITA State Self-Assessment methodology to be outcomes-focused in alignment with the CMS-approved Investment Management Toolkit; procuring 5+ contracts, several of which were outcomes-based, introducing standardized project reporting to the PgMO, and implementing MES performance dashboards.

- **Iowa (IA) Medicaid**

- *Iowa Medicaid Enterprise Modernization Effort (MEME) (10/2022 – present)*

Kevin supported this project as a core team member for the strategic planning of the MES, including definition and implementation of the #EpicShift principles. Additionally, he was a primary architect of the outcomes-based strategic planning effort.

Chartrand LLC (06/2021 – 02/2024)

Kevin supported national consulting groups in their projects with state and territorial clients, including:

- **BerryDunn**

- *Puerto Rico Medicaid Program (PRMP) Medicaid Enterprise System (MES) Program (06/2021 – 02/2024)*

Kevin served multiple roles while supporting this project, including Program Management Office (PgMO) Support Director, Solution Architect, Portfolio Advisor, Integrated MES Program Management (IMES) Team Lead, and Outcomes-based Procurement Team Lead. Additionally, he served as a specialist for BerryDunn's support of PRMP's program-based approach to the MES, outcomes lifecycle management, MES roadmap definition and management, and other

focus areas. Key elements of these roles included defining PgMO, Executive Steering Committee, and PgMO Support functions; development and maintenance of the MES and Program Management Roadmaps; development of the MES Outcomes Management Plan, tailoring the approach to be outcomes-focused; updating the MITA State Self-Assessment methodology to be outcomes-focused in alignment with the CMS-approved Investment Management Toolkit; procuring 5+ contracts, several of which were outcomes-based, introducing standardized project reporting to the PgMO, and implementing MES performance dashboards.

- **Intervision**

- *California Department of Health Care Services Medi-Cal Program (01/2022 – 01/2023)*

Kevin served as an Enterprise Architect focused on defining the MES Modernization Roadmap through IT Product Delivery (ITPD) and developing a performance management approach for Streamlined Modular Certification outcomes-based projects.

- **Elyon Enterprise Strategies, Inc.**

- *California Department of Health Care Services Medi-Cal Program (06/2021 – 01/2022)*

Kevin served in several roles at DHCS, including continuing work on the transition of modernization to an enterprise-level agile organization using Scaled Agile Framework for Enterprises (SAFe).

SPM Research Group, home of TransformHHS (10/2019 – 02/2024)

As founder and CEO, Kevin leveraged his experience as a strategic consultant for state HHS agencies to develop an online platform that allows states to share planning and execution information with each other, manage their communications with CMS and other stakeholders, and manage their own MES program from defining their roadmap to developing their APDs to monitoring and reporting their performance metrics. He led a pilot with five states in partnership with Elena Nicolella of NESCSO. Now open to all states, tHHS Insights (tHHS' first product) now houses over 10,000 documents, focusing on contract, procurement and APD documentation. Kevin also serves on the CMS MITA Governance Board, MITA NextGen Redefinition Working Group as a Medicaid and MITA Subject Matter Expert.

Elyon Enterprise Strategies, Inc. (01/2020 – 01/2022)

Kevin worked as the senior director and led the "Elyon 2.0" practice, crafting and creating foundation and stabilizing capabilities, structures, and processes and designed and led the strategic planning and acceleration plans for the group for rapid growth. He also led Elyon's initiative to prepare the firm for large-scale growth including implementation, configuration and administration of Salesforce as a business development platform, standardizing collaborative workspaces and processes, and leading strategic growth initiatives. Through Salesforce Kevin

extended core objects; developed and implemented new and third-party objects for recruiting, onboarding, and project tracking; established role-based dashboarding and reporting; and trained staff on optimal use. The Salesforce org was credited with supporting an immediate three-fold increase in proposal volume, with a significant increase in quality. His project delivery and roles included:

- *Engagement Manager, primary Subject Matter Expert, MITA Document Specialist, and Advance Planning Document (APD) development lead for the State of California Department of Healthcare Services (DHCS)*
- *Engagement Manager and Subject Matter Expert for the State of California Department of Justice IT Strategic Planning / Agency Information Management Strategy (AIMS) project*
- *Medicaid and HHS Subject Matter Expert for State of North Dakota Department of Human Services GOTS to COTS Feasibility Assessment*
- *HHS Subject Matter Expert for State of Oklahoma Department of Health Implementation Project Health Check*
- *Engagement Manager for two concurrent Franchise Tax Board systems implementation / upgrade projects*
- *Engagement Manager for Oregon Higher Education Coordinating Committee (HECC) Stage Gate 2 Planning*

Gartner Consulting (07/2008 – 10/2019)

- As a Senior Director, Kevin was the engagement lead for Gartner's state, federal and local health and human services clients covering strategic planning, program and project management establishment, full procurement lifecycle, quality assurance and IV&V, and business analysis. At the 2014 Medicaid Enterprise Systems Conference, Kevin partnered with a client to present "Using the MITA SS-A to Align Procurements with Your Future State," discussing successes in leveraging the national standard to develop client-oriented and business-driven system procurements that is easily understandable by vendors. Example Work in this role includes:
- Developed Gartner Consulting's Medicaid Information Technology Architecture (MITA) State Self- Assessment (SS-A) Methodology, Approach, Collaboration tool, and Artifacts which was used on all SS- A's performed while at Gartner
- Facilitated MITA State Self-Assessments for the State of Connecticut Department of Social Services and Vermont Agency of Human Services in support of a strategic MITA roadmap for the Agency. Developed interview and analysis tools, identified strategic intra-Departmental initiatives, and managed disparate groups of stakeholders to achieve a complete modernization roadmap

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- Engagement manager and key resource for the strategic planning process for the Delaware Health Information Network, a national leader in Health Information Exchange
 - Engagement manager and key resource for the development of the Federal Integrated Advance Planning Document (IAPD) for Tennessee Department of Human Services' Enterprise Systems Modernization, including Child Support Enforcement; Supplemental Nutrition Assistance Program (SNAP); Temporary Assistance for Needy Families (TANF); Child Care and other TDHS programs and services; development of the go-to-market procurement strategy
 - Project managed and contributed to the strategy development and quality assurance and independent verification and validation (QA / IV&V) for the County of San Diego Health and Human Services Agency Knowledge Integration Project, and adaptation of the Accountable Care Organization for communities and local governments
 - Project managed and developed the value creation and financial sustainability models for the Statewide HIE for the State of Connecticut Department of Public Health, and for the State of Arkansas Office of Healthcare Information Technology. This model included a review of system and organization costs based on local and national industry trends, calculation of quantifiable value based on state-specific health care metrics, and recommended detailed immediate and near-term, and potential long-term funding strategies
 - Developed an extensive IT scenario-based cost model for a large national commercial healthcare client, including definition of current/future cost drivers. The model provided a seven-year view of a multibillion-dollar IT department and included extensive metric projections based on known IT drivers matched with company-specific and industry guided cost drivers. The model provided both detailed expectations of cost in specific IT 'towers' as well as executive-ready budget projects and predictive analytics with adjustable sensitivity analyses
 - Developed the State HIE Strategic and Operational Plans for the State of Connecticut Department of Public Health. The 190-page plan included a deep understanding of the status of HIT in the State as well as guidance for the future of EHR adoption through the development of an HIE in the State. The project was completed with large amount of interaction between Gartner, the Department of Public Health, the Department of Social Services (Medicaid) and the assigned Regional Extension Center
 - Developed the SMHP and IAPD detailing Medicaid EHR Incentive Program requirements and strategy for the State of Connecticut Department of Social Services. This project further enhanced communication and collaboration between the three Federal grantees for HIT in the State and harmonized the collaboration to ensure the most effective development of HIT in the State

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 MPG and supports the following projects:

- **State of WV**

- **WV BMS (04/2022 – present)**

- *WV APD Consulting Services project (06/2023 – present)*

Nycole serves as a 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 DHHR systems projects.

- *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.

- *PERM RY2023 Project (04/2022 – present)*

Nycole serves as a project SME for the PERM Project. She focuses on validating DP and medical record errors, researching error remedies and providing recommendations for resolution of PERM errors cited for WV.

- *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 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.

Dorothy “Dot” Ball, MA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	30+
Certifications and Education:	Master of Arts in Government, International Relations – Latin American Development, Public Policy Studies, and International Terrorism, New Mexico State University Bachelor of Arts in Government – Public Policy, Political Psychology, and International Relations, New Mexico State University Six Sigma Green Belt ESRI Geographic Information System (GIS) Technology Certification Agency for Healthcare Research and Quality's (AHRQ) Knowledge Transfer (KT)/Implementation program - State Healthcare Policy Program Certification. State of Texas, Secondary Education Certification AIDS Education and Training Centers Train the Trainer Educator Certification CDC Public Health Advisor Certification

Overview

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

Experience**BerryDunn (06/2009 – present)**

- **State of WV**
WV BMS

- *Medicaid EDS Procurement Assistance, Implementation, and the Centers for Medicare and Medicaid Services (CMS) Certification Project*
Dot currently serves as the Project Training Lead and supports the Testing and Certification teams. She previously supported the Data Visioning & Warehouse RFP and Concept of Operations (ConOps) Development, as well as the Certification team for the Procurement Assistance Project.
- *Medicaid Enterprise GAPMS Project (11/2016 – 03/2018)*
Dot served as Policy Analyst and ACA SME.

WV DoHS

- *WV Medicaid Enterprise IES Project (09/2018 – present)*
Dot serves as BA / SME supporting the Deliverables Review team for the WV Project Management Services.
- *MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 – present)*
Dot serves as a MITA SME/Analyst.
- *ACA Compliance and Implementation Project (05/2010 to 12/2013)*
Dot served as a Lead Policy Analyst.
- *State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 – 10/2010)*
Dot served as BA.

- **Puerto Rico**

Puerto Rico Medicaid Program

- Puerto Rico MMIS Enterprise
Objective Monitoring and Control Services (08/2020 – 09/2021)
Dot served as MITA SME/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise Key Performance Indicators (KPI) Set/Guide.

- **AHCCCS**

- *Testing Experience and Functional Tools in Community-Based Long-Term Services and Supports (TEFT) Grant PHR Assessment project (07/2014 – 09/2014)*
Dot served as Business Analyst/SME.

- **Massachusetts State Medicaid**

- *Health IT Plan and EHR Incentive Payment Program (10/2010 – 01/2011)*
Dot served as BA.

POGIS Consulting LLC/Dorothy A Ball Consulting (06/2009 – present)

As principal consultant for this small veteran-owned analytics and subject-matter consultancy, Dot focuses on providing services in the areas of health IT, healthcare delivery systems, and government-funded health and human services.

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

Consulting roles and projects include:

- Lead Analyst: New Mexico MMIS Replacement Project – Medical Assistance Division (MAD) MITA State Self-Assessment (SS-A) and Child Support Enforcement NHSIA assessment prepared for the State of New Mexico Human Services Department (HSD)
- Policy Manager: Arizona Health Insurance Exchange (HIX) IV&V
- MITA SME/BA: AHCCCS MITA 2.0 and 3.0 SS-A
- Policy Analyst: Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application
- Lead Policy Analyst: WV BMS ACA Compliance and Implementation Project
- Lead Policy Analyst: Alabama Medicaid Managed Care External Quality Review (EQR) project

FourThought Group, Inc. (08/2002 – 05/2009)

As senior BA, Dot provided policy analysis, regulatory analysis, business process analysis, and change management for state health and human services agencies, including work on the following projects:

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

- Lead BA managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third-Party Administrator Transition and System Implementation project
Dot managed requirements development team.
- Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS)
Dot was a member of the HIPAA privacy policy compliance team completing assessments.
- Lead BA Indiana MITA Analysis project.
Dot performed business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, developed As-Is and To-Be Assessments and web enabled documentation request surveys using Survey Monkey, planned and facilitated validation sessions, and documentation review, and developed solutions transition and a sequencing plan for the MITA strategic Roadmap.
- Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development and Implementation project.
- Senior Policy Analyst for South Dakota HIPAA Security Policy and Procedures compliance project.
Dot performed policy and procedures gap analysis of existing Department and State Information Technology authority documentation.
- BA responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework. (This was among the first MITA assessments performed.)
- Policy Analyst providing support to the CMS MITA Initiative Team.
Dot provided policy guidance for the development of MITA Business Model and MITA Assessment tools. She participated in MITA framework development workgroups and MITA MMIS reshaping efforts including HL7 Financial Management workgroup and was familiar with most aspects of the framework and technical specifications.
- Business Analyst/SME for Washington State Medicaid MMIS procurement project.

New Mexico Health Policy Commission (03/2000 – 08/2002)

As senior policy analyst, Dot was responsible for the management of state policy and planning projects addressing access to healthcare, including:

- Managing task force activities and studies, including Medicaid cost containment, prescription drug access, provider retention issues, workforce shortages, health professional regulation, and rural and immigrant access to healthcare
- Managing population survey and data analysis projects that resulted in significant legislative changes
- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues,

Managed Care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues

- Analyzing and interpreting state and federal laws and regulations
- Analyzing health care legislation and providing technical support to the state legislature, governor, and the New Mexico delegation to the U.S. Congress
- Developing data collection tools and survey instruments
- Conducting comparative health data analysis
- Responding to legislative requests and mandates

Rio Bravo Therapy Services (08/1996 – 11/1999)

As development director, Dot managed agency development activities, including financial and program development, service delivery, business management budget, and board development activities for a full-service physical/occupational rehabilitation center.

Southwest AIDS Services (01/1992 – 04/1994)

Dot was responsible for overall agency management activities, including programs, boards, staff, and general operations for a full-service, multi-county nationally recognized AIDS support services organization.

New Mexico Department of Health (09/1989 – 01/1992)

As disease prevention specialist, Dot conducted state public health infectious disease surveillance activities, including epidemiological investigations, case management, and data analysis; clinical and disease management quality assurance policies and protocols; and border health policy studies for the New Mexico Legislature.

Cynthia Taylor

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	45+ years
Certifications and Education:	Licensed Practical Nurse, Trenholm State Technical College Alabama Board of Nursing License Certification in Healthcare Privacy Certification in Healthcare Security

Overview

Cynthia is a consultant specializing in healthcare compliance, Medicaid, and HIPAA privacy and security. A retired Licensed Practical Nurse (LPN) and former Medical Practice Manager, Cynthia has more than 45 years of medical and healthcare compliance experience, including experience in claims analysis and submission, medical records review, medical records management, physician and patient scheduling, purchasing, budgeting, audits, policy development, training, and personnel management.

Experience**BerryDunn (12/2012 – present)**

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

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

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

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

- *MITA State Self-Assessment (SS-A) (08/2012 – present)*
Cynthia serves as a MITA SME/Analyst for WV's MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects.
 - *WVCHIP (09/2020 – 03/2021)*
As a BA, Cynthia assisted WVCHIP with transitioning from FFS delivery to Managed Care model. Cynthia assisted in the operational and system readiness reviews and the development of the Operational and Monitoring Plan.
 - *ICD-10 Implementation (03/2013 – 04/2016)*
Cynthia worked on the ICD-10 Implementation Project and provided support to

the Project Manager as a SME on healthcare policy. She assisted in the remediation of the BMS Provider Policy Manual for ICD-10 Implementation, facilitated Policy Workgroup Sessions with program areas, and assisted in coding analysis and generating configuration spreadsheets for needed changes in the MMIS.

- *Adult Quality Measures Grant Project (03/2013 – 10/2016)*

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

- *ACA Project (12/2012 – 08/2013)*

Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.

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

- *Puerto Rico MMIS Enterprise Objective Monitoring and Control Services (08/2020 – 09/2021)*

Cynthia served as a SME to assist the Puerto Rico Department of Health (PRDoH) with development of an RFP for the PRMP MES MMIS Financial Management Solution module. She assisted with the development of contract requirements, soliciting responses, detailing response requirements, and the outlining of PRMP's process for evaluating responses and selecting a vendor.

Alabama Medicaid Agency (07/2002 – 12/2011)

As a Senior Healthcare Compliance Consultant for a consulting firm, Cynthia worked on the following projects for the Alabama Medicaid Agency:

- *MMIS Coordinator's Office (06/2006 – 12/2011)*

Cynthia provided business analysis and project support for the MMIS implementation and certification. She assisted with the development of an APD and Invitation to Bid (ITB) for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a Recipient Web Portal, Provider Web Portal for enrollment and re-enrollment, NCCI edits, and 5010 compliance. Additionally, she assisted with the development of an APD for NCCI and ICD-10.

- *IV&V and Technical Assistance of the FA MMIS Implementation (04/2006 – 10/2008)*
Cynthia provided project management support; monitored and tracked correspondence between the Agency, FA, and IV&V vendor; reviewed and compiled Agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the Project Manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the Agency and FA delivery schedule.
- *Managed Care EQR (06/2006 – 05/2011)*
Cynthia served as Project Lead for the EQR of the Maternity Care Program and Partnership Hospital Program (PHP). Her responsibilities included scheduling, conducting, and documenting assessments of the primary contractors; generating reports to CMS; and providing recommendations to the Agency to help ensure compliance with the Managed Care federal regulations.
- *HIPAA Security Implementation (07/2004 – 12/2004)*
Cynthia scheduled Privacy/Security Advisory Group (PSAG) meetings; scheduled, conducted, and documented security risk assessments; produced and distributed HIPAA Security Manuals to Senior Management; produced and distributed the Security Officer's Manual to the Security Officer; and assisted Agency General Counsel in execution of HIPAA Security Business Associate Agreements.
- *HIPAA Privacy Implementation (07/2002 – 06/2004)*
Cynthia worked with the Agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing Agency Notice of Privacy Practices; developing Agency privacy policies, procedures, and forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

Baptist Health System (2002)

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

Children's Health System (1981 – 2000)

As the Medical Practice Manager for Children's Health System (formerly Physicians to Children/Central Alabama Children's Specialists), Cynthia worked closely with nursing and medical staff, including preparation and execution of regulatory guidelines and documentation required for Clinical Laboratory Improvement Amendments (CLIA), Occupational Safety and Health Administration (OSHA), and the JCAHO accreditations and certifications.

LPN (1977 – 1981)

Cynthia began her career as an LPN for Jackson Hospital and Clinic, and later for James R. Beshear, MD at his practices.

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</p> <p>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 Multi-State 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.

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 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.

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- *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 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.

Jeff Stoddard, CCP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	19 Years
Certifications and Education:	BS, Management of Information Systems, University of Vermont Prosci® Certified Change Practitioner (CCP®) Health Leadership Development Program, Daniel Hanley Center for Health Leadership

Overview

Jeff is an accomplished strategic leader in healthcare technology and analytics, with a demonstrated track record in spearheading system development initiatives centered around Medicaid, Medicare, and commercial data. His adeptness in engaging with a wide array of stakeholders, fostering consensus, and cultivating productive relationships stands as a testament to his interpersonal competence. Jeff's unwavering commitment to project objectives is consistently underscored by his ability to deliver results punctually and within budget constraints, consequently aiding clients in optimizing operational efficiencies, enhancing care quality, and reducing costs.

Experience**BerryDunn (12/2019 – Present)**

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

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

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

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 – present)*

- Jeff provides technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

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

- Jeff provides technical leadership and analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*

Jeff provided technical leadership and business analysis support to the Department of Health and Human Resources (DHHR) for the implementation of the State's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

West Virginia Department of Human Services (DoHS)

- *Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2020 – present)*

Jeff provides subject-matter expertise and analytic support to assist the State in implementing their multi-source data warehouse solution.

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

- *Enterprise Data Warehouse (EDW) Business Intelligence System Support (09/2023 – present)*

Jeff provides subject-matter expertise and support to assist Puerto Rico in implementing their multi-source data warehouse solution.

Onpoint Health Data (08/2013 – 07/2019)

As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including systems development, infrastructure, and data security.

- **Data System Development**

Jeff led a diverse team of more than 10 system developers and contractors responsible for building and maintaining the systems used for ingesting, processing, and warehousing all payer claims data. Under Jeff's leadership, the Onpoint system was enhanced to manage healthcare data for over 50 million members and calculate more than 150 healthcare cost, utilization, and quality measures, including Centers for Medicare and Medicaid Services (CMS), Accountable Care Organization (ACO), and National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS) measures.

- **Analytic Enclave Implementation**

Jeff was the primary architect and responsible for the successful implementation of the Onpoint Analytic Enclave, a new service offering that enables users to log into a secure, performant, cloud-based analytic environment where they can directly access and work with all payer claims data using the tools of their choice. Through the Analytic Enclave, users were empowered to generate analytics and reports to inform healthcare policy, measure program efficacy, and report on State healthcare costs and utilization.

- **Development and Implementation of a More Robust Information Security Program**

Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.

Arcadia Solutions (04/2012 – 07/2013)

As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and business intelligence capabilities for a community health network in the State of Washington, building an integrated claims and clinical data warehouse with a user interface to be used for population health management. The project was delivered on schedule and within budget.

Health Dialog (09/2004 – 04/2012)

As senior director of Operations for Health Dialog, Jeff led a large team of developers, quality assurance analysts, and business analysts responsible for the acquisition, transformation, and quality of healthcare data from many of the largest health plans in the United States. This data was used to drive the disease management function of the business, which resulted in better management of the highest-risk populations that in turn lead to better health outcomes and a reduction in health plan costs.

Jim Strassenburgh

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

Overview

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

Experience**BerryDunn (02/2013 – present)**

As a valuable member of BerryDunn's Medicaid practice group, Jim has supported the following projects:

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

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

- *Enterprise Data Services and Data Source Program (01/2020 – present)*
As a technical subject matter expert (SME), Jim concentrates on data governance for this large initiative and serves as an integration point between the People's Access to Help (PATH) program data services and enterprise data services.
 - *People's Access to Help (PATH)/Integrated Eligibility System (IES) Program (10/2019 – present)*
Jim is a member of the State Program Management Office, serving on the Document Review Team. As a team member, Jim reviews all program artifacts, with a focus on operations, architecture, performance testing, and data governance components for the program.

- **Massachusetts HIX/IES Entities**

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

- **Maryland Health Benefit Exchange**

- *IV&V for Maryland's HBE Implementation (02/2013 – 04/2014)*

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

- **Missouri Department of Social Services**

- *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services*

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

MetroSource, Corp. (1995 – 2012)

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

Rochester Institute of Technology (01/2010 – 12/2011)

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

Xerox (05/2008 – 06/2009)

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

NYFIX, Inc. (01/2000 – 07/2006)

As Vice President for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security;

compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.

Azba Hotelwala

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Master of Public Affairs with a concentration in Public Management (in progress) Bachelor of Science in Kinesiology, Indiana University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Azba is a skilled healthcare professional with a diverse background in communications, community engagement, patient care and management, lab techniques, CRM software, and Atlassian Suite tools. With experience in both public and private organizations, Azba has successfully used data and research to support and care for patients and clients. Her contributions to project management and successful project implementation demonstrate her attention to detail and ability to simplify complex information. She has played a significant role in developing project deliverables such as monthly status reports, presentations, statements of work (SOWs), project closeout summaries, advanced planning documents (APDs), and vendor performance scorecards. Azba demonstrates her analytical skills through analyzing West Virginia (WV) requirements alignment with federal requirements and conducting gap analyses to develop business process forms for state self-assessments (SS-As). Azba's strong time management and ability to handle multiple projects simultaneously make her a valuable asset. Her diverse skill set, commitment to growth, and adaptability in different environments further enhance her value to any team.

In addition to her technical skills, Azba is pursuing graduate-level coursework in public policy, public finance and budgeting, public management economics, statistical analysis for effective decision-making, and design and management of complex projects. With this knowledge, she can navigate the complexities of healthcare policy and help make well-informed decisions.

Experience
BerryDunn (05/2022 – present)

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

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

- *Certified Community Behavioral Health Centers State Plan Amendment (09/2022 – present)*

As a consultant, Azba has made significant contributions to the CCBHC team. Her support includes taking meeting notes, conducting thorough artifact research,

diligently tracking project milestones, and preparing comprehensive monthly status reports. She has also demonstrated her expertise in developing presentations and effectively documenting action items, risks, issues, and decisions. Furthermore, Azba has played a crucial role in drafting and conducting peer reviews of multiple deliverables, helping to ensure their high quality and accuracy.

- *Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2022 – present)*

As a project coordinator, Azba provides support in MITA lifecycle maintenance activities. She simultaneously develops presentations for client meetings, takes meeting notes, conducts artifact research, tracks project milestones, prepares monthly status reports, manages action items, identifies risks/issues, and makes informed decisions. Azba has also assisted in the development of deliverables such as the Data Management Strategy (DMS) report and the Health Information Technology (HIT) report. Azba has conducted a detailed gap analysis to inform updates for the 2021 SS-A report and road map in the business relationship management area. Additionally, she has contributed to the planning efforts for the utilization of Jira software in the upcoming SS-A period.

- *ARPA Section 9817: HCBS Implementation Project (05/2022 - 09/2022)*

As a project coordinator for the project, Azba actively engaged in research and analysis, providing valuable insights and supporting the development of essential project deliverables.

WV Department of Health and Human Services (DoHS)

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (05/2022 – present)*

As a project coordinator, Azba has provided support to the EDS team in various areas including taking meeting notes, conducting artifact research, and tracking project milestones, action items, risks/issues, and decisions. She has also assisted in the development of deliverables for contractual obligations such as APDs, SOWs, vendor performance scorecards, and project closeout summaries. Additionally, she is proficient in using Atlassian Suite tools like Confluence, Jira, and Jama.

LaSalle Network (01/2022 – 05/2022)

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

Mother Hubbard's Cupboard (08/2018 – 05/2022)

Azba served as an Advocate for Community Engagement where her main role was to recruit service-learning courses at Indiana University that would meet the needs of Mother Hubbard's Cupboard, a local food pantry. She successfully implemented and facilitated reflection sessions with students to encourage a meaningful volunteering experience. In addition, Azba carried out annual surveys and Community Development Block Grant (CDBG) forms to aid Mother Hubbard's Cupboard in receiving proper funding.

IU Health Bloomington Hospital (06/2021 – 02/2022)

Azba worked as a patient care technician in the Adult Medical Unit, where she was responsible for monitoring patients' vital signs and remaining alert to any changes. Azba also performed lab specimen collection procedures and provided assistance to patients with activities of daily living. Collaboration with other healthcare staff was a key aspect of her role to help ensure patient comfort and promote overall well-being.

University Elementary School (01/2021 – 06/2021)

Azba served as an Assistant Health Aide at University Elementary School for the MCCSC school district. Her primary tasks included COVID-19 data entry and utilizing her first aid skills to assess and address students' needs. Azba played a crucial role in maintaining accurate health records and creating a safe learning environment for students.

Hoosier Home Health (03/2020 – 05/2021)

Azba worked as a home health aide, where her main responsibilities involved assisting disabled and geriatric patients with activities of daily living to facilitate their independence and well-being. Azba remained vigilant in monitoring patients' health and promptly responded to any health concerns to help ensure their optimal well-being.

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.

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.

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

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

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

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

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

Hailey served as an Adolescent Lead Social Caseworker IV to provide over 2500 hours of intensive casework services to families and children yearly. She developed productive working relationships with clients, creating a collaborative partnership between team members and stakeholders; successfully identified the needs of clients to create and implement solution-focused plans of action; and helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress. Hailey conducted research and investigation to help ensure proper reporting, prosecution, and documentation of child abuse and neglect reports. She also performed assessments of new cases, referred clients to appropriate resources creating a substantial decrease in repeat infractions, and provided accurate updates and testimony in court hearings and mediations. She trained and supervised new caseworkers and acted in a supervisory role to members of the casework team.

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

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

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

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

Cate Poling

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Regents Bachelor of Arts, emphasis in English Literature, Marshall University Associate of Arts, emphasis in English, West Virginia University Parkersburg Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Overview

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

Experience

BerryDunn (06/2021 – present)

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

- **State of WV**

- **WV Bureau for Medical Services (BMS) (05/2023 – present)**

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

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

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

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

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

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

- **WV Department of Human Services (DoHS) (06/2021 – present)**

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

As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address

security-related items and workflows per Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC) guidance.

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

As a project coordinator for the PATH project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

Mountain State Eye Associates (04/2017 – 06/2021)

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

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

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

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

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

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

Highmark WV BCBS (10/2012 – 07/2014)

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

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

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

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

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

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

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

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)*
- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 – 01/2022; 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, 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 pick-up 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.

Shandia Benke, ECBA™

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Arts in History, Columbia College Entry Certificate in Business Analysis (ECBA™) Certified

Overview

Shandia is an ECBA™ certified project coordinator with over 10 years of experience in successfully supporting projects across a multitude of industries, including financial services, education, and landscaping, as well as within the federal and state health insurance and social programs sphere. Shandia excels as a senior paraprofessional, providing valuable administrative and coordination support to help enhance productivity to all projects she is involved with. Shandia's deep expertise provides her with a strong foundation and keen insight in a variety of project aspects, including editing and reviewing, analysis, metrics gathering, writing, managing project documentation, SharePoint site construction, leading Joint Application Design (JAD) sessions, conducting user acceptance testing (UAT), meeting facilitation, internal training and onboarding, vendor training and onboarding, systems and processes set up and improvement, and Articulate Storyline e-learning course creation. Shandia is a proven resource for creative problem solving and is especially adept at identifying gaps and helping to communicate and facilitate improved business processes.

Experience**BerryDunn (04/2018 – present)**

- **State of West Virginia (WV) Department of Human Services (DoHS)**
 - *WV Engagement (WVE) PMO Mountain Health Trust (MHT) Phase II Project (2/2024-present)*
 - *WVE PMO People's Access to Help (PATH) Project (05/2023 – present)*
Shandia provides coordination and analytical support to the MHT and PATH projects through capturing detailed notes, editing and reviewing project documentation, and contributing insightful processes and business analysis. Additionally, Shandia focuses on promoting efficiency through identifying gaps in internal processes and taking opportunities to provide process improvements.
- **Missouri Department of Social Services (DSS)**
 - *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 – present)*
 - *MME PMO Program Integrity (02/2019 – 01/2021)*
 - *MME PMO Business Intelligence Solution – Data Warehouse Enterprise*

(04/2018 – 02/2019)

Shandia has supported the MME PMO through three implementation projects – two from start-up to certification and project closure. She provides support by creating, editing, reviewing, tracking, analyzing, assessing, and storing project documents in the client's SharePoint site; scheduling and providing meeting minutes for all project meetings; facilitating meetings; tracking and assessing project defects, questions, decisions, action items, and internal client/vendor/provider questions; providing analysis, quality metrics, and validation for project work; and identifying opportunities to implement structure and process improvements. BerryDunn's team helps the State address topics from strategies for modular certification and requirements traceability to program management best practices to leverage for a multi-vendor enterprise.

Jefferson City, MO Chamber of Commerce (2017 – 04/2018)

As the membership and special events coordinator, Shandia fulfilled a range of administrative support duties, including creating reports to help facilitate decision-making internally and among committees; scheduling internal and external events and meetings; creating and maintaining detailed records of events, event participation, and financial transactions; and providing administrative support for the Jefferson City (JC) Chamber's ambassadors and their activities, such as ribbon-cutting and membership appreciation events. In addition, Shandia maintains committee records, event registrations, and member prospects in the JC Chamber membership database. Shandia also supports key office clerical activities as needed.

United Landscape Design (2017)

As an office administrator, Shandia created and provided an organizational and systematic structure within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

Lighthouse Preparatory Academy (2015 – 2017)

As an office manager, Shandia assisted in establishing systems and structures to help the office and organization run more effectively. In addition, Shandia oversaw daily accounting activities for the general ledger; assisted in the preparation of the annual budget; helped resolve accounting, payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 – 2016)*
As a teacher, Shandia taught a range of subjects, including 6th Grade Grammar and Composition; 7th Grade Literature; Life Fitness; High School Psychology; Keyboarding; and Introduction to Computers.
- *Dean (2012 – 2015)*
As a dean, Shandia managed the character education program and provided support to students, families, and faculty.

Hentges Tree Service (2013 – 2015)

As an office administrator, Shandia supported the mechanical fleet at Hentges by utilizing

Dossier interface software. In this position, Shandia also created new internal processes and procedures to increase office efficiency.

Wells Fargo Home Mortgage (2012)

As an administrative assistant, Shandia provided office support for the home mortgage business. As part of this role, she helped to coordinate training, plan events, schedule meetings, and order and distribute office supplies.

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 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**

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- *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.
 - **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.

Janine DiLorenzo

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

Overview

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

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

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

Breakwater School (08/2019 – 08/2021)

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

Community Connections of Brockton (06/2011 – 06/2018)

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

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

Stonehill College (08/2010 – 05/2011)

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

Jonathan “Jon” Williams

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.

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.

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 lead 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, 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 also built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
02	Monthly Status Report	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
03	Project Timeline	Schedule for the MITA 3.0 SS-A AU 2022 Project
04	MITA SS-A AU 2022 Report	BerryDunn will update a report that is a structured method for documenting and analyzing the AS-IS operations and to-be environment of business, information, and technical capabilities of the State Medicaid Enterprise. The SS-A facilitates alignment of the State Medicaid Enterprise to MITA Business, Information, and Technical Architectures, as well as the Seven Standards and Conditions.
05	MITA Roadmap	BerryDunn will produce a report that addresses State goals and objectives, as well as key activities and milestones covering a five-year outlook for proposed Medicaid Enterprise System solutions.
06	Scorecards	A tool for the State Medicaid Agency (SMA) to conduct its SS-A. The SS-A scorecards assist with data collection and maturity evaluation.
07	DMS	BerryDunn will create a document that provides the approach to integrating and organizing data through references to data governance, data standards, data processes and procedures, data integration, and metadata repository.
08	TMS	BerryDunn will create a document that describes the technical strategy, services, and systems throughout the West Virginia Medicaid Enterprise (WVME). All strategies, services, and systems currently, or soon to

Deliverable #	Deliverable Name	Deliverable Description
		be implemented, are critical elements that support the overall TA.
09	Assessment File Copies	Assessment file copies for the MITA 3.0 SS-A AU 2022 Project
10	Visio Process Maps	Process maps to display the MITA review process.
11	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
AU	Annual Update
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
DLP	Desk Level Procedure
DMS	Data Management Strategy
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
PM	Project Manager
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
TMS	Technical Management Strategy
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 ⁱ
- ☐ All Words ⁱ
- ☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc"

x

Entity



Location



Status



- ☒ Active
- ☐ Inactive

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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 Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)		
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

Annual Reports
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Monday, June 3, 2024 — 8:51 AM

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