



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: 05-29-2024

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 BMS2400000050 1	Procurement Folder:	1436279
Document Name:	Programmatic Managed Care Support Project	Reason for Modification:	
Document Description:	Programmatic Managed Care Support Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

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

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

Total Order Amount: \$1,490,385.00

Purchasing Division's File Copy

CH 6/14/24  
PURCHASING DIVISION AUTHORIZATION  
DATE: 6/14/24  
ELECTRONIC SIGNATURE ON FILE

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

**Extended Description:**

Programmatic Managed Care Support Project

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

Total: \$1,490,385.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$33,540.00
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

156 hours @ \$215 = \$33,540.00

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

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

Engagement Manager: Optional Year One

Hourly Rate: \$270.00

130 hours @ \$270 = \$35,100.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$13,325.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

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

Lead MMIS Project Manager: Optional Renewal Year One

Hourly Rate: \$205.00

65 hours @ \$205 = \$13,325.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,090,260.00
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  
6,057 hours @ \$180 = \$1,090,260.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$318,160.00
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  
3,977 hours @ \$80 = \$318,160.00



May 13, 2024

To Whom It May Concern:

BerryDunn has submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Bureau for Medical Services by providing support for the Programmatic Managed Care Support Project under our master contract (CMA # HHR21\*03). As stated in the SOW document, the duration of this work is estimated to be thirteen (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:

*Peter Alfrey*

2DAAA44ADB3A477...

Peter Alfrey

Principal

207-541-2242

OK

*Althea Greenhowe*





# West Virginia Department of Human Services, Bureau for Medical Services

Programmatic Managed Care Support 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 13, 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) Programmatic Managed Care Support Project**

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS), Bureau for Medical Services (BMS), and West Virginia Children's Health Insurance Program (WVCHIP) in supporting program activities as they pertain to the Mountain Health Trust (MHT) and Mountain Health Promise (MHP) managed care programs. This work will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) #HHR21\*03 BMS Project Management Services contract between BerryDunn and 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 provide organizational, resource, and technical support to enhance the MHT and MHP programs. This project will serve to build upon procurement efforts to address any program and process improvements including:

- Engagement Oversight
- Project Management Support
- Request for Application (RFA) Assistance
- Staff, Managed Care Organization (MCO), and Public Training
- Managed Care Advisory Services

The Programmatic Managed Care Support Project will also aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Minimize risk and maximize value from contracted services and products
- Leverage technology to enhance performance and decision-making.
- Assess, implement, and monitor compliance with all relevant federal laws and regulations (e.g., Patient Protection and Affordable Care Act [PPACA], Health Insurance Portability and Accountability Act [HIPAA]).
- Help ensure program quality.
- Improve operational efficiency and reduce costs in the healthcare system.



- Enhance the ability for members to participate in and exercise responsibility for their personal health choices.
- Enhance BMS' ability to analyze the effectiveness of potential and existing benefits and policies.
- Improve provider access to real-time data.
- Improve consistency of plan management processes and effective communication of policy.
- Improve healthcare outcomes for members.

## 1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of BMS Center for Managed Care Chief, Susan Hall-Deel as the BMS project sponsor and BMS Center for Managed Care Assistant Director, Anita Ferguson as the BMS 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 Ed Daranyi, Nicole Becnel, Peter Alfrey, and Ethan Wiley. Liz Vose will provide managed care program oversight.
- 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 Susan Hall-Deel 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 Medicaid Management Information System (MMIS) Implementation Advance Planning Document Update (IAPDU) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) previously approved the MMIS IAPDU 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 \$1,490,385 (included in the approved IAPDU).

Therefore, any additional scope added to the services to be provided under this SOW may



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require the State to update its MMIS IAPDU to allocate additional funds for project management.



## 2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members 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"> <li>D01: Commissioner Briefing</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon acceptance of the Project Closeout Summary by the project sponsor or designee.</p>	<p>Nicole Becnel</p> <p>Eduardo Daranyi</p> <p>Peter Alfrey</p> <p>Ethan Wiley</p> <p>Dawn Webb</p> <p>Emily McCoy</p> <p>Liz Vose</p>	297
2.0	<p><b>Project Execution and Control</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will host a project kickoff meeting and prepare a high-level project timeline upon project initiation.</p> <p>In support of ongoing project management, BerryDunn's leadership will regularly meet with the project sponsor to discuss project status and issues impacting the timely completion of the work and oversee BerryDunn staff, services, and deliverables. Project management support will also include:</p> <ul style="list-style-type: none"> <li>Facilitating meetings, preparing meeting materials, and note-taking for BerryDunn- and State-owned meetings.</li> </ul>	<p>Nicole Becnel</p> <p>Eduardo Daranyi</p> <p>Peter Alfrey</p> <p>Ethan Wiley</p> <p>Liz Vose</p> <p>Crystal Fox</p> <p>Julie Bandy</p> <p>Julie Dupuis</p> <p>Mary Stewart</p> <p>Kortney Ester Walls</p> <p>Brody McClellan</p> <p>Jonathan Watkins</p>	1,087



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> <li>Preparing monthly project status updates, risks, issues, and briefings for the State leadership team.</li> <li>Managing project logs (action item, decision, issue, and risk tracking).</li> <li>Providing a project documentation repository in an agreed-upon SharePoint location.</li> </ul> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>D02: Monthly Status Reports</li> <li>D03: Project Timeline</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon project completion and formal acceptance of the Project Closeout Summary by the project sponsor or his/her designee.</p>	AJ Mong Jordan Ramsey Jonathan Williams Caitlin Cabral Alycia Minshall Megan Hamilton Hailey Holden Katie McDonald Cate Poling Kourtney Kirk	
3.0	<p><b>RFA Advisory Services</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management and advisory services to support the State with activities surrounding the RFA review process for managed care plans.</p> <p>BerryDunn will assist the State with requested activities, including:</p> <ul style="list-style-type: none"> <li>Providing project management tracking and assistance to the State and vendors during the review process and post implementation.</li> <li>Developing RFA review evaluation process and materials.</li> <li>Developing staff and vendor policies.</li> <li>Assisting BMS in determining programmatic implications and risk mitigation strategies that may result in transitioning to the RFA process.</li> <li>Recommending monitoring protocols to supplement any changes resulting from the RFA process.</li> <li>Participating—in an advisory capacity—in application submission reviews.</li> <li>Onboarding new MCOs.</li> <li>Assisting with any additional requested activities surrounding the RFA process.</li> </ul>	Liz Vose Crystal Fox Julie Bandy Julie Dupuis Mary Stewart Kortney Ester Walls Marylou Banker Brody McClellan Shandia Benke Jonathan Watkins AJ Mong Jordan Ramsey Jonathan Williams Caitlin Cabral Alycia Minshall Megan Hamilton	5,846



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p><i>Completion Criteria</i></p> <p>All parties will deem RFA Advisory Services complete upon project completion and formal acceptance of the Project Closeout Summary by the project sponsor or his/her designee.</p>		
4.0	<p><b>Managed Care Advisory Services</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will support BMS in developing managed care requirements and programs based on state and federal initiatives and provide expertise to BMS staff around contract management.</p> <p>This support will include, but is not limited to the following:</p> <ul style="list-style-type: none"> <li>• Providing project management support for managed care BMS staff, as requested.</li> <li>• Providing research and subject matter expertise, as needed.</li> <li>• Providing staff development and training surrounding managed care and contract management.</li> <li>• Developing staff training modules and updating existing staff training modules, as needed.</li> <li>• MCO training, as needed</li> <li>• Providing support around any state/federal initiatives, including legislative actions that impact the MHT/MHP programs.</li> </ul> <p><i>Completion Criteria:</i></p> <p>All parties will deem Managed Care Advisory Services complete upon project completion and formal acceptance of the Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Liz Vose Crystal Fox Julie Bandy Julie Dupuis Mary Stewart Kortney Ester Walls Marylou Banker Brody McClellan Amber Davis Nolan Cyr Alex Garcia Aaron Krinsky Shandia Benke Jonathan Watkins AJ Mong Jordan Ramsey Jonathan Williams Caitlin Cabral Alycia Minshall Carole Ann Guay Emily Hendrickson Janine DiLorenzo KD Dobyne</p>	3,115
5.0	<p><b>Project Closeout</b></p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at project close. Additionally, the summary will document the disposition or reassignment of all</p>	<p>Nicole Becnel Eduardo Daranyi Peter Alfrey Ethan Wiley Liz Vose Jonathan Watkins</p>	40



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>action items, issues, and risks that remain open to an agreed-upon state operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"><li>D04: Project Closeout Summary</li></ul> <p><i>Completion Criteria</i></p> <p>All parties will deem BerryDunn services complete upon project completion and formal acceptance of the Project Closeout Summary</p>	<p>Jordan Ramsey</p> <p>Jonathan Williams</p> <p>Caitlin Cabral</p> <p>Alycia Minshall</p> <p>Megan Hamilton</p>	
Total Hours			10,385
Total Not-To-Exceed Cost Estimate			\$1,490,385



### 3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 1 in CMA HHR21\*03 BMS.

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

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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Nicole Becnel	130	\$35,100
8	LPM	\$215	Eduardo Daranyi	156	\$33,540
10	LMPM	\$205	Emily McCoy	65	\$13,325
11	GPM	\$180	Peter Alfrey	185	\$33,300
11	GPM	\$180	Ethan Wiley	453	\$81,540
11	GPM	\$180	Dawn Webb	65	\$11,700
11	GPM	\$180	Liz Vose	1,817	\$327,060
11	GPM	\$180	Crystal Fox	1,687	\$303,660
11	GPM	\$180	Julie Bandy	325	\$58,500
11	GPM	\$180	Julie Dupuis	325	\$58,500
11	GPM	\$180	Mary Stewart	258	\$46,440
11	GPM	\$180	Kortney Ester Walls	258	\$46,440
11	GPM	\$180	Marylou Banker	322	\$57,960
11	GPM	\$180	Brody McClellan	195	\$35,100
11	GPM	\$180	Amber Davis	167	\$30,060
12	SS	\$80	Jonathan Watkins	1,300	\$104,000
12	SS	\$80	AJ Mong	130	\$10,400
12	SS	\$80	Shandia Benke	1,300	\$104,000
12	SS	\$80	Hailey Holden	130	\$10,400
12	SS	\$80	Jordan Ramsey	132	\$10,560
12	SS	\$80	Jonathan Williams	130	\$10,400
12	SS	\$80	Caitlin Cabral	65	\$5,200
12	SS	\$80	Alycia Minshall	65	\$5,200
12	SS	\$80	Megan Hamilton	65	\$5,200
12	SS	\$80	Carole Ann Guay	65	\$5,200
12	SS	\$80	Emily Hendrickson	65	\$5,200



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Janine DiLorenzo	65	\$5,200
12	SS	\$80	KD Dobyne	65	\$5,200
12	SS	\$80	Katie McDonald	65	\$5,200
12	SS	\$80	Cate Poling	96	\$7,680
12	SS	\$80	Kourtney Kirk	96	\$7,680
12	SS	\$80	Nolan Cyr	65	\$5,200
12	SS	\$80	Alex Garcia	39	\$3,120
12	SS	\$80	Aaron Krinsky	39	\$3,120
Total				10,385	\$1,490,385



## 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**

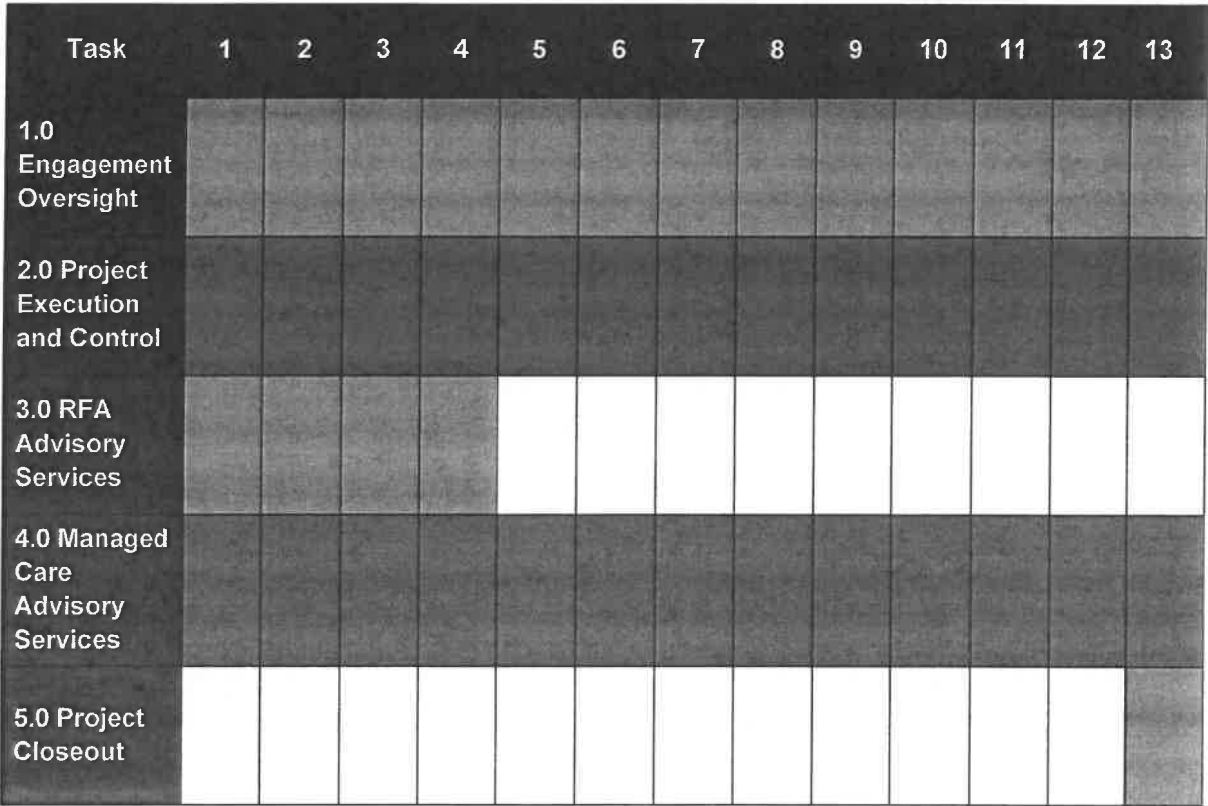
Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	10	12	5	453	304	784	\$112,165
Month 2	10	12	5	466	304	797	\$114,505
Month 3	10	12	5	466	303	796	\$114,425
Month 4	10	12	5	466	303	796	\$114,425
Month 5	10	12	5	466	307	800	\$114,745
Month 6	10	12	5	468	307	802	\$115,105
Month 7	10	12	5	468	307	802	\$115,105
Month 8	10	12	5	468	307	802	\$115,105
Month 9	10	12	5	468	307	802	\$115,105
Month 10	10	12	5	468	307	802	\$115,105
Month 11	10	12	5	468	307	802	\$115,105
Month 12	10	12	5	468	307	802	\$115,105
Month 13	10	12	5	464	307	798	\$114,385
<b>Total</b>	<b>130</b>	<b>156</b>	<b>65</b>	<b>6,057</b>	<b>3,977</b>	<b>10,385</b>	<b>\$1,490,385</b>



# 5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





**BerryDunn Authorized Signature**

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

**-DocuSigned by:**

Peter Alfrey

**Signature**

5/13/2024

Date \_\_\_\_\_

### BMS Approval of Approach, Staffing, and Not-to-Exceed Cost

*[Signature]*

**Signature**

5/22/24

Date \_\_\_\_\_

### WVCHIP Approval of Approach, Staffing, and Not-to-Exceed Cost

Frank Shee

**Signature**

5/22/24

Date \_\_\_\_\_



## Appendix A: Resumes

**Nicole Becnel, PMP®**

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

### Overview

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

### Experience

#### **BerryDunn (06/2010 – present)**

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

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



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



- *HIT Statewide Strategic Plan development (2012 – 2014)*
- *Provider Enrollment (2012 – 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*

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

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – present)*

Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor.

BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

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

Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*

Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS' programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership collaborating with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.

- *APD Assistance (07/2010 – present)*





Nicole is the Lead Project Manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*  
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 – 06/2020)*  
Nicole was the Lead Project Manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC) and adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.
- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 – 10/2020)*  
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored



findings reports for each MCO and prepared an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

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

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add CHIP to the program. BerryDunn assisted the State with developing an RFP to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted increased quality of care and health outcomes as well as data quality and efficiency for the State's managed care populations.

- *Provider Management Support (07/2019 – 01/2021)*

Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to twelve state partners that participate monthly.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*

Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

- *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*

Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and



focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 – 09/2013)*

Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.

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

Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities, including presentations and training at Provider Workshops held throughout the State.

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

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of Health Insurance Portability and Accountability Act (HIPAA) Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, subject matter expert (SME) advisory services, UAT planning assistance, operational readiness assessment assistance, and post implementation project management and monitoring.

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

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

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

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

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



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

- **Project Manager for MIHMS Provider Enrollment**

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

- **WV MMIS**

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all budgets, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated period, 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


**Eduardo “Ed” Daranyi, MEd, PMP®**

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

**Overview**

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

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

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

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

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

- *Engagement Manager (2012 – present)*

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

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



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



*(08/2015 – 08/2018)*

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



- *Eligibility and Enrollment (E&E) Systems Modernization*
- *Adult Quality Measures*
- *Centers for Medicare & Medicaid Services (CMS) Advance Planning Development*
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment*
- *Childrens Health Insurance Program (CHIP) Implementation and Stabilization*
- *Access to Care Planning and Monitoring*
- *Provider Re-enrollment*
- *Asset Verification System Procurement*
- *West Virginia (WV) CHIP Operational Readiness Review (2019 – present)*  
Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three managed care organizations (MCOs) selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 – present)*  
Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supported technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*  
As engagement manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service





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

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

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

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

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

- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*

Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed



also focused on establishing and assisting in the management of change management processes and participated in the certification process and report process development.

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

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

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

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

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

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

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

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

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

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



- *Independent Audit of the State IT Services EPMO (04/2007 – 06/2007)*  
BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of the evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

#### **Martin's Point Health Care (2005 – 2007)**

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

#### **Goold Health Systems (1999 – 2005)**

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

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

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

- **Maine DHHS (05/2001 – 01/2002)**

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

#### **Electronic Data Systems (1985 – 1988)**

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



on a team that implemented a new manufacturing and assembly system for the truck assembly plant.

### **Presentations**

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

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

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on [www.berrydunn.com](http://www.berrydunn.com) include but are not limited to: NAMD 2020

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




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**Emily E. McCoy, RN, BSN, PMP®**


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<b>Proposed Project Role:</b>	Lead MMIS Project Manager
<b>Role at BerryDunn:</b>	Senior Manager
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	Bachelor of Science in Nursing, Marshall University Registered Nurse Project Management Institute (PMI) Certified Project Management Professional (PMP®) Certified Executive Coach

### Overview

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

### Experience

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

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

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

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

- *Eligibility and Enrollment Implementation Assistance (01/2018 – present)*  
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily is able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
- *Public Health Emergency (PHE) (10/2021 – 7/2022)*  
Emily served as a subject matter expert (SME) for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with



unwinding efforts and get the policies and eligibility processes back to a pre-COVID state once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*  
Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
- *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*  
Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

- **New Jersey Division of Medical Assistance and Health Services (DMAHS)**

- *MMIS Modernization (7/2022 – 12/2023)*  
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
- *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*  
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.

- **Henrico County, VA**

- *Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 – 04/2017)*  
Emily was a key resource on BerryDunn's team to provide Henrico with planning



and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

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

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

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

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

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

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



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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)**





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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**

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Principal
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	Master of Business Administration, Organizational Management, Husson University Master of Arts in History, Providence College Bachelor of Arts in Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional® (PMP®) Prosci® Certified Change Management Practitioner (CCP) Lean Six Sigma Green Belt Certification

**Overview**

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing portfolio and program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects and serving as a General Project Manager for the West Virginia (WV) Department of Human Services (DoHS) Bureau for Medical Services (BMS), Peter brings comprehensive knowledge about health plan operations, process improvement, procurements and vendor management, and best practices that support Medicaid and health and human services client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives, and policy initiatives.

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

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

- **State of WV**

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

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



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

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



deliverables and reporting, supporting coordination of Washington inter-agency meetings and information sharing, and providing stakeholder management services.

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

- *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 08/2017)*

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

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

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

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

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

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

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

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

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

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

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multifaceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various



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regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.



Ethan Wiley, MPPM, PMP®, CCP, LSSGB

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

Overview

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

Experience

BerryDunn (07/2014 – present)

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

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



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

- *WV Certified Community Behavioral Health Center (CCBHB) Project (07/2021 – present)*  
As portfolio Manager Ethan oversees a BerryDunn team working to create a new State Plan Amendment for WV Medicaid to implement new and expanded health and behavioral health services. Specifically, CCBHCs are a specially-designated clinic that provides a comprehensive range of mental health and substance use services.
- *ARPA Section 9813: Mobile Crisis Grant Project (07/2021 – present)*  
Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.
- *State Plan Review and Support (SPRS) Project (03/2020 – present)*  
In order to help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (State and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training State stakeholders on the new process flow.
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 – 10/2021)*  
As program manager, Ethan oversaw a team that assisted DoHS in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project was to assist the DoHS with MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A



Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 – present)*  
As project manager, Ethan plans and executes the design, negotiation, and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for CSED who are enrolled in the CSEDW program. The CSEDW permits WV to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in State and out-of-State in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.
- *Technical Assistance and Program Support Project (11/2018 – present)*  
Serving as the overall program manager and subject matter expert Ethan oversees a project as which provides project management, subject matter expertise, and support activities for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake. Ethan and his team perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*  
Working as the lead policy analyst and subject matter expert for Phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in WV. Through this Section 1115 Waiver, WV has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD. Serving as the data management lead for Phase 2 of the project, Ethan worked to design tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of WV's program. Serving as program manager for Phase 3 of the project, Ethan oversees the project manager and leads. In addition to ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to help ensure quality program design.
- *Third-Party Liability (TPL) Options Analysis Project (07/2018 – 12/2018)*  
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led investigated both solution and financing alternatives for the State to conduct their





Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

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

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

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

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

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



contact with DHS for project management and provides responsibility for quality of all final project deliverables.

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

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

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

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

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

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

- **Nebraska Department of Motor Vehicles**

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

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

- **Michigan Department of Education**

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

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

- **Colorado DHS**

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

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



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

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Manager
<b>Years of Experience Relevant to Proposed Role:</b>	12 years
<b>Certifications and Education:</b>	<p>Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University</p> <p>Associate in Applied Science, Office Administration, West Virginia University</p> <p>Certified Project Management Professional® (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP)</p> <p>Certified Professional Coder, American Academy of Professional Coders (CPC)</p> <p>Certified Outpatient Coder, American Academy of Professional Coders (COC)</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p>

### Overview

Dawn is a manager in BerryDunn's Medicaid Practice Group, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 30 years of experience in medical claims processing and revenue cycle management, including 12 years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advance Planning Documents (APDs).

### Experience

#### **BerryDunn (08/2017 – present)**

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

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

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

- Client & Engagement Operations Program Manager (01/2024 – present)

As client and engagement operations manager, Dawn provides engagement support in process improvement, best practices, staffing allocations, and project managers for the WV Engagement. Dawn also provides project oversight for the following projects: *Payment Error Rate Measurement (PERM) (05/2018 – present)*

- *APD Consulting Services (05/2023 – present)*
      - *Partnership Management Support (December 2023 – present)*



- *Quality Improvement Initiatives Portfolio Manager (05/2019 – 01/2024)*  
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 Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:
  - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)*
  - *Data Improvement Project (09/2019 – present)*
  - *Public Health Emergency (PHE) Support (12/2021 – present)*
  - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)*
  - *Provider Management Support (11/2019 – present)*
  - *State Plan Review and Support (SPRS) (02/2020 – present)*
  - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)*
  - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)*
- *Partnership Management Support (December 2023 – present)*  
Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.
- *APD Consulting Services (05/2023 – present)*  
Dawn currently manages the BerryDunn team for the WV Engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as-needed updates to 10 established APDs.
- *PERM Project (05/2018 – present)*  
Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the



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

- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*  
Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.
- *TPL Procurement (05/2019 – 03/2022)*  
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
- **Colorado Office of State Auditor (OSA)**
  - *Recovery Audit Contractor (RAC) (09/2023 – present)*  
As the Medicaid Manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist the Government Assurance Practice Group (GAPG) within BerryDunn in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF) – the Colorado SMA, and the HCPF RAC vendor to gather information and address the findings of the evaluation.
- **United States Virgin Islands (USVI)**
  - *Project Management and APD Support (10/2022 – present)*  
Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.
- **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.



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**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 Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

**Unisys (06/2004 – 11/2009)**

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

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

As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department to perform billing audits of patient medical records.

**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 medical claim examiner.



## Liz Vose, MPA

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

### Overview

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

### Experience

#### BerryDunn (02/2022 – present)

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

- **State of West Virginia (WV)**
  - WV Department of Human Services (DoHS) (07/2022 – present)**
    - *WV Mountain Health Promise (MHP) Re-Procurement Project (07-2022-09/2023)*  
Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
    - *WV Mountain Health Trust (MHT) Re-Procurement Project (07/2022-06/2023)*  
Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
    - *WV Mountain Health Trust Phase II (11/2023- present)*  
Liz serves as the Medicaid Project Manager and Managed Care SME
    - *WV Legislative Implementation Assistance Project (LIAP) (09/2023-10/2023)*



Liz served as the Medicaid Project Manager.

- *WV Certified Community Behavioral Health Center Project (CCBHC) (06/2023- present)*

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

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

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

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

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

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

- *Acting Deputy Director, Division of Managed Care (10/2018 – 03/2019)*

Liz supported the Associate Commissioner for the Division of Managed Care in overseeing behavioral health managed care operations spanning analytical, policy, stakeholder engagement, and compliance workflows.

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

Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including but not limited to public presentations, road shows, social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She liaised with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Interim Deputy Director prior to departure.

- *Project Manager (12/2013 – 04/2015)*

Liz managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked and risks were communicated to executive staff as well as the Governor's office.





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**SUNY Albany (09/2011 – 12/2013)**

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

**HAVE Inc. (04/2007 – 08/2009)**

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

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

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



## Crystal Fox, CCP

<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Certifications and Education:</b>	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)*
    - *Child Welfare Initiatives Project Management Services (06/2020 – 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.
- Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract



request for proposals (RFP) for the Bureau for Children and Families' child placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.

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

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



Act during the public health emergency. Crystal prepared summaries or tracking documents based on the research findings, which was incorporated into presentations presented to the client by project leads.

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

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

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

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

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

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

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

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

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

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

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

- *EOMC Services (08/2020)*

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

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

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

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

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



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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.



**Julie Bandy**

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

**Overview**

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

**Experience**

**BerryDunn (12/2022 – present)**

- **State of West Virginia (WV)**
  - WV Department of Human Services (DoHS)**
    - *Medicaid Enterprise System (MES) Home and Community-Based Services, Incident and Case Management System (ICMS) project (12/2022 – present)*

Julie serves the ICMS project as a subject matter expert supporting requirements gathering, design, and research support. Directed streamlining of forms and processes for ICMS.
    - *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (03/2023 – 12/2023)*

Julie served the CSEDW project as a subject matter expert supporting waiver design and research. Responsible for creation and revision of policy to correspond to updated waiver application.
    - *Advance Planning Document (APD)Support Project (07/2023 – present)*

Julie serves the APD project as the ICMS subject matter expert supporting updates to that portion of the APD, and as a team member drafting portions of the overall document as needed.
    - *Mountain Health Trust (MHT) Phase II (02/2024 – present)* Julie serves as a subject matter expert supporting the development of training and oversight materials.
    - *Legislative Implementation Assistance Project (LIAP) (07/2023 – 09/2023)*

Julie served the LIAP as a subject matter expert in the creation of a plan to



implement legislatively required updates to the prior authorization requirements and processes in fee-for-service and managed care landscape. She was responsible for interpretation of requirements, identifying gaps in current system, and research support.

- *Data Improvement Project (DIP) (03/2023-06/2023)*

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

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

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

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

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

### **Jacobs Home, Inc (12/2005 – 10/2007)**

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

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

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

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

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



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

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

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

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





## Julie DuPuis, MPA

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

### Overview

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

### Experience

#### BerryDunn (06/2022 – Present)

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

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

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

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

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, Home and Community-Based Services, Incident and Case Management System project (07/2022 – present)*
- Julie serves the MES MSP project as a subject matter expert supporting requirements gathering and research support.

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

Julie served as a Data Resource Analyst & Medicaid Specialist to help ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start



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

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

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



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She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members that were over 135% Federal Poverty Level (FPL). She interacted with the actuary almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

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

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



## Mary Stewart, MS

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

### Overview

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

### Experience

#### BerryDunn (01/2023 – present)

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

##### WV Bureau for Medical Services

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

#### Rose International (10/2021 – 1/2023)

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



database processes and reviewed Managed Care Organization (MCO) contracts for compliance with the 21st Century Cures Act.

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

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

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

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

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

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

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

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

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



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UAT for the implementation of the MMIS modernized Data Warehouse.

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

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

- *Business Analyst/Lead Researcher, Bureau of Remediation (01/2002 – 10/2002)*

Mary serviced and tracked loans for the revolving Federal loan fund program. She also redesigned and maintained Bureau's website and worked with a team of colleagues to create an online web-based grant writing application.



## Kortney (Ester) Walls, MBA, CSM

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

### Overview

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

### Experience

#### BerryDunn (03/2023 – present)

##### State of West Virginia (WV)

##### WV Bureau for Medical Services (BMS)

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP)*

*Project (03/2023 – present)*

As a General Project Manager (GPM), Kortney oversees subprojects, develops and edits contract requirements, conducts research, and helps ensure the quality of deliverables.

- *MES Incident and Case Management System (ICMS) Procurement Project (03/2023 – present)*

As a subject matter expert (SME), Kortney conducts peer reviews and research.

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

Kortney serves as a General Project Manager, overseeing project tasks through completion, conducting research on client inquiries, developing deliverables, and explaining project responsibilities to other SMEs.

##### Puerto Rico Medicaid Program

- *Puerto Rico Enterprise Objective Medical Control Services (EOMC) (11/2023 –*

*02/2024)*

Kortney served as a GPM, providing interface testing assistance among CMS, Puerto Rico, and CMS's testing vendor. She helped ensure that testing requests and



responses were accurate and up to CMS's requirements standards. She also developed testing reports and testing tracking deliverables.

**KPMG, LLP (03/2021 – 03/2023)**

- **TennCare (03/2021-03/2023)**

Kortney worked as a Senior Associate in Advisory to consistently maintain 100% utilization, accurate timesheets, and schedules. She recorded and edited client-facing meeting minutes, capturing key decisions and action items, provided feedback and next steps to associate-level team members on their work as an engagement Transition Coach and SA, and managed project plan development, project artifacts, performance reporting and tracking, and communication, including testing and procurement items. She also researched, compiled, and analyzed data on other states and entities related to active/potential procurements. Kortney provided ongoing procurement support to a state Medicaid client and participated in daily standup and client-facing meetings as a contributor and observer. She assessed processes and procedures to help ensure the implementation of lean practices, successfully coordinated external testing with a state-level client and CMS, and oversaw Managed Care Organization (MCO) test data on behalf of a state-level client. Kortney led CMS Interoperability data exchange transformation testing for a state-level Medicaid client while she also coordinated and facilitated meetings with CMS, clients, and vendors, providing current project updates.

**Franklin County Job & Family Services, OH (08/2015 – 04/2021)**

Kortney served as a Case Manager who determined eligibility for the Supplemental Nutrition Assistance Program (SNAP) (food assistance), Temporary Assistance for Needy Families (TANF) (cash), and various categories of Medicaid, including waiver services, CHIP, pregnant mothers, and SNF. She worked as a front-end subject matter expert (SME) with vendors on two major state integration and transformation projects, including Ohio Benefits and state telephony enrollment. She utilized various federal and state data systems to verify the information and determine eligibility, interpreted, explained, and applied policy (Ohio Revised Code) to determine applicant eligibility, and complied with all federal and state security and privacy related laws. Kortney worked independently at the Ohio State University Wexner Medical Center to determine eligibility and coordinate benefits with hospital billing and resources. She analyzed complex back-end eligibility system user issues to quickly find long-term solutions, provided detailed front-end feedback on flawed or inefficient business processes, and worked with Buckeye, Aetna, United HealthCare, and Molina to assist enrollees and help coordinate benefits.

**Walls Wiring (10/2012 – 11/2017)**

Kortney worked as Project Manager to review Requests for Proposals (RFPs) to find new contracts for the company, promote business and services by creating marketing campaigns, and facilitate daily scrum meetings with project teams. She managed projects, evaluated quality and progress, and updated stakeholders. Kortney also mapped business processes and regularly improved them using lean practices.





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**Ohio Public Employee Retirement System (12/2013 – 02/2015)**

Kortney served as a Member Service Representative who provided retirement counseling services to members, enrolled members and their families into healthcare plans with Aetna and other MCOs and maintained retirement accounts and determined retirement eligibility. She liaised with managed care plan organizations, members, and nursing facilities. She created retirement estimates for members, computed members' retirement payments and healthcare costs, and interpreted and applied policy to determine accurate payment amounts and health benefits eligibility.

**Tennessee Department of Human Services (07/2011 – 08/2012)**

Kortney served as Eligibility Counselor and Unit Lead, who interpreted and applied state policy to determine eligibility for Medicaid, SNAP, and TANF. She independently managed a large caseload of individuals and families, used multiple state systems to perform tasks and verify information, and helped implement a new state eligibility system. As a lead, she trained newly hired staff with on-the-job training (and provided ongoing support and corresponded with clients through mail, email, phone, and in person interviews.


**MaryLou Banker, CAPM®, LSSGB**

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

**Overview**

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

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

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

- **State of WV**

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

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

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



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



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

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

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

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

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

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

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

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

MaryLou held multiple positions with GENUITY.

#### **Supervisor, Desktop Services**

International Company of 5,000 Employees. MaryLou managed operational teams responsible for implementation and support services, implemented Service-Level Agreements for all Desktop Services, led teams in rolling out sales force automation tool (Siebel), selected to



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review Siebel project for upper management and saved the company \$2,000,000.00, managed rollout of CCM (Comprehensive Client Management) to all employee desktops/laptops, and implemented Fast-Start program for Account Creation team to enable new employees to be up and running with needed access the day of employment.

**Supervisor, IT Helpdesk**

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

**IT Helpdesk Analyst**

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



## Brody J. McClellan, MPA

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

### Overview

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

### Experience

#### BerryDunn (09/2021 – present)

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

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

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

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

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

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

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

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



Services.

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

#### **Mercer GHSC (10/2019 – 07/2020)**

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

#### **Independent Consultant (10/2019 – 06/2020)**

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

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



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

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

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

**State of Michigan (12/2007 – 04/2015)**

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





## Amber Davis, CCP

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



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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.



## Jonathan "Jon" Watkins

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

### Overview

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

### Experience

#### BerryDunn (10/2021 – present)

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

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

- *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 – 11/2022)*

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon's work helped to ensure the State had a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

- *WV Public Health Emergency (PHE) Support Project (12/2021 – 12/2022)*

Jon provided project coordination and monitored project risks and issues to assist the WV DoHS with temporary flexibility that provides services to different beneficiaries during PHE. Jon's work helped to keep the client informed and helped ensure the project met its goals and objective.

- *WV Certified Community Behavioral Health Clinic (CCBHC) (11/2023 – 12/2023)*

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV CCBHC Project when needed. Jon's work helped to keep the client informed and helped ensure the project meets its goals and objectives.

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



- *Mountain Health Trust (MHT) Re-Procurement Project (03/2022 – 07/2023; 11/2023 - present)*  
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of MCO procurement activities for MHT. Jon's work will help to ensure the State has a comprehensive RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 – present)*  
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MES MSP Project. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.
- *WV Mental Health Parity Project (01/2022 – 02/2023)*  
Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.
- *WV Peoples Access to Help (PATH) (11/2023 – 2/2024)*  
Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the WV PATH Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

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

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

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

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

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

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



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recording per call.



## AJ Mong, MEd

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

### Overview

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

### Experience

#### BerryDunn (07/2022 – present)

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

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

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

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



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

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

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

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

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

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

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

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

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





## Shandia Benke, ECBA™

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator
<b>Years of Experience Relevant to Proposed Role:</b>	6 years
<b>Certifications and Education:</b>	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*



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– 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)**



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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.



## Hailey Holden

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Staff Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	8 years
<b>Certifications and Education:</b>	Bachelor of Arts in Psychology, Purdue University

### Overview

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

### Experience

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

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

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

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

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

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

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

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

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

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



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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.



**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)**



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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 Illinoian (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.




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**Jonathan “Jon” Williams**


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

**Overview**

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

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

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

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

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

**Midwest Tape (11/2004 – present)**

Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog ([mwtnewsandviews.com](http://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.





## Caitlin Cabral

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

### Overview

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

### Experience

#### BerryDunn (09/2021 – present)

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

#### QualityMetric (08/2020 – 09/2021)

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

#### University of Hartford's Department of Psychology (01/2019 – 05/2020)

Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.

#### True Colors, Inc. (01/2019 – 05/2019)

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



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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.



## Alycia Minshall, MA

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

### Overview

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

### Experience

#### BerryDunn (8/2022 – present)

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

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

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

#### Public Sector Consultants (4/2017 – 8/2021)

- *Senior Editor (6/2020 – 8/2021)*

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



accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

- ***Editor (4/2017 – 6/2020)***

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

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

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

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

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

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

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

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

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

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

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

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




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**Megan Hamilton, MA**


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

**Overview**

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

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

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

**Fiverr (05/2022 – 12/2022)**

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

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

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

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

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

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

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

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

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



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**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.




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**Carole Ann Guay**


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

**Overview**

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

**Experience****BerryDunn (10/2014 – present)**

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

- **State of West Virginia (WV)**
  - **WV Department of Human Services (DoHS)**
    - *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 – 07/2017)*  
Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Puerto Rico**
  - *Enterprise Objective Monitoring and Control (09/2023 – present)*  
Carole Ann assists with review and updates of deliverables.
- **Ellis County, TX**
  - *Computer-Aided Dispatch and Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 – present)*  
Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.
- **City of Saint Charles, MO**
  - *Enterprise Resource Planning (ERP) System Selection Project (09/13/2023 – 10/06/2023)*  
Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN**



- *Information Security Program Development (05/2016 – present)*  
Carole Ann worked as a project coordinator for Metro's development of their Information Security Management Program, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.
- **Vermont Department of Vermont Health Access**
  - *Vermont Health Connect Financial and Programmatic Audit (01/2016 – present)*  
Carole Ann currently serves as the project coordinator on the State's financial and programmatic audit of its Health Insurance Exchange completed for FYE 6/16 and in progress for FYE 6/17 to determine whether the exchange is in material compliance with 45 CFR 155.
- **Minnesota Health Benefit Exchange (MNsure)**
  - *Programmatic Audit (10/2015 – present)*  
Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements as BerryDunn performs the programmatic audit for the State's health insurance exchange.
- **Sacramento Municipal Utility District (SMUD)**
  - *Information Security Audit (08/2016 – 12/2017)*  
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **Massachusetts State Ethics Commission**
  - *CMS Planning and Implementation Services (04/2017 – 06/2017)*  
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO)**
  - *Local Government IT Security Audits (11/2014 – 06/2017)*  
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

#### **Webber Energy Fuels (2004 – 2014)**

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





## Emily Hendrickson

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




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**Janine DiLorenzo**


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

**Overview**

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

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

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

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

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

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

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

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



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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 also 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.



## KD Dobyne

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

### Overview

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

### Experience

#### BerryDunn (09/2023 – present)

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

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

As a project coordinator, KD was responsible for responding to client needs to ensure successful receipt of project deliverables, including spreadsheets, powerpoints, and closeout packages. She created and delivered purchase orders and also 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 and led prospective students through the admissions process and provided exemplary customer service to meet admissions percentage goals. She completed data entry tasks, such as the entering of standardized testing scores, as well as the organization of student admission packets. KD supported senior admissions employees by completing office tasks such as printing, copying, and filing and also built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.



## 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



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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.



## Cate Poling

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	9 years
<b>Certifications and Education:</b>	Regents Bachelor of Arts Degree, emphasis in English Literature, Marshall University Associate of Arts Degree, 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) (06/2021 – present)**

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS*





*Certification Project (06/2021 – present)*

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

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

As a project manager, Cate assists with refining, expanding, and initiating the DIP systems development 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)**

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



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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 and priced and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.



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**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

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

### Overview

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

### Experience

#### BerryDunn (10/2022 – present)

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

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

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

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

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

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



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

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

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

#### **TEKSystems (08/2020 – 01/2022)**

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

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

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



## Nolan Cyr, MA

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

### Overview

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

### Experience

#### BerryDunn (06/2022 – present)

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

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

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

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

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

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

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

As a Business Analyst, Nolan assisted the State with activities specific to



organizational development in West Virginia (WV). His focus was supporting the State as BMS develops and implements a three-year strategic plan. Services included aiding the design and facilitation of a multi-day strategic planning retreat, creating workshops, webinars, and e-learning courses that support strategic plan implementation, deliverable development, and meeting facilitation.

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

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

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

- *MLC Operations Lead*

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

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

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

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

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

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

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

- **Oregon Health Authority, Health Promotion Chronic Disease Prevention**



### **(HPCDP) Section**

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

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

- **Iowa Department of Health and Human Services (Iowa HHS)**

- *Medicaid Enterprise Modernization Effort (MEME) (09/2023 – present)*

Iowa Medicaid has launched a systems modernization initiative, beginning with solutions targeted at achieving the top business priority: improving the experience for providers and Medicaid staff in provider enrollment, screening, credentialing, and maintenance of provider information. In his role, Nolan provides organizational development and organizational change management (OCM) support for the MEME project.

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

- *Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 – present)*

As an APD SME, Nolan is a part of the team supporting the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

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

- *Medicaid Management Information System (MMIS) Modernization (12/2023 – present)*

As an APD SME, Nolan is a part of the team supporting the Alaska HCS MMIS Modernization project, which includes developing, updating, and tracking of Alaska HCS APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

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

Nolan worked as an intern with the senior HR team to develop pieces of training targeted at improving leadership competencies in directors and executives across the MaineHealth network. He developed pieces of training on Time Mastery, Emotional Intelligence, and DiSC, as well as, assisted in the creation of MaineHealth's new leader first year success and Leader as Coach training programs which were administered to all directors and executives. He



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organized and summarized annual systemwide employee engagement survey data and build a dashboard to measure and chart changes across HR metrics.

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

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

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

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

**Publications and Presentations**

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



## Alex Garcia

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Consultant
<b>Years of Experience Relevant to Proposed Role:</b>	9 Months
<b>Certifications and Education:</b>	

### Overview

Alex is an experienced professional video editor who demonstrates keen knowledge and skill with managing and developing client relationships, exceeding sales targets, and improving client satisfaction. He has experience with various programs, including Premiere, After Effects, Photoshop, and Illustrator, and is proficient in collaboration, content creation, and scheduling.

### Experience

#### BerryDunn (07/2023 – present)

Alex is a staff consultant working with BerryDunn's Medicaid clients to support various aspects of video production and Medicaid-systems related media content development. Alex also assists with maintenance, development, and enrollment efforts for BerryDunn's Medicaid Learning Center (MLC) online application.

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

#### Department of Human Services, Hawaii Med-QUEST Division

- *Organizational and Business Process Redesign (08/2023 – present)*

Alex has provided valuable support with video production of training videos, new employee orientation, and release trainings. He has also supported in-person video shoots with clients and staff, including managing full set-up with professional lighting, audio, camera, and teleprompter. Additionally, Alex has consistently demonstrated expertise with professional video editing to include color correction and audio enhancement; exported videos uploaded to Vimeo for MLC/Rise integration, and User Acceptance Testing (UAT) Environment screen shot manipulation with Photoshop to mask Personally Identifiable Information (PII).

- **MLC**

- *MLC Support*

Alex provides support with enrolling and registering new users, course creation, updates, and upkeep using Prosperity online software. Other key elements of this role include:

- Participant Guide review and creation
- Storyboard review and creation
- Experience with Articulate software: Rise, and MLC online software: Prosperity



## **KHON2 (04/2018 – present)**

### **Producer, Living 808, KHON2 News (09/2021 – 09/2023)**

Alex managed and developed client relationships, exceeding sales targets and improving client satisfaction. He collaborated with clients and internal teams to develop customized advertising solutions. His accomplishments included producing 80+ episodes of Living808, managing concept creation, client meetings, location scouting, and talent scheduling.

### **Executive Producer, Sam Choy's in the Kitchen (02/2020 – 09/2023)**

Alex produced 144+ episodes of Sam Choy's in the Kitchen, managing concept creation, client meetings, location scouting, and talent scheduling. He directed camera operations, grip and lighting, and audio recording; edited and finalized episodes using Adobe Creative Suite: Premiere, After Effects, Photoshop, Illustrator; and supervised content, talent scouting, and creative authority as show-runner.

### **Promotions Producer, KHON2 Marketing (04/2018 – 10/2021)**

As the promotions producer, Alex produced various KHON2 branded commercials, custom client commercials, and internal promotional videos. He conducted client meetings, developed concepts, and coordinated talent scheduling. Directed camera operations, grip and lighting, and audio recording. He edited and finalized promotional videos using Adobe Creative Suite: Premiere, After Effects, Photoshop, Illustrator.

### **Cooking Hawaiian Style (Contracted by Carillo Digital (03/2010 – present).**

Alex has filmed over 50 episodes of Cooking Hawaiian Style as camera operator for recorded as live multi-camera shoot. As the production assistant, he has conducted studio and field pre-production lighting and set preparation, and operated Camera B under the direction of director of photography.

### **Let's Go Fishing Hawai'i (01/2010 – present)**

As the Lead Editor/Camera Operator Alex edited 250+ episodes of Let's Go Fishing Hawai'i, conducting studio and field videography, full episode editing, graphic design, commercial traffic, music arrangements, and episode delivery. Operated camera for in-house and on-location cooking segments.

### **DIS-N-DAT Media Group LLC (02/2005 – 08/2017)**

Alex was the director/camera operator/editor, co-producing 20+ episodes. He performed pre-production interviews, script design, videotaping, post-production creation of music videos, commercial advertising, and episode delivery.

## **Filming Credits**

- Miss Teen Hawai'i USA & Miss Hawai'i USA Live Streaming and Broadcast: TV Director (01/2023)
- Stanford Med Open House at STTC: Camera Operator / Editor (02/2023)
- Miss Teen Hawai'i USA & Miss Hawai'i USA Live Streaming and Broadcast: TV Director (01/2022)
- Koloa Landing Kaua'i Poke Fest: TV Director / Camera Operator / Editor (05/2022)



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- Na Leo Mother's Day Concert Producer / Director / Camera (05/2022)
  - Aloha Week Floral Parade: TV Director (09/2022)
  - Pride Parade Live: TV Director (10/2022)
  - Makaha Sons Christmas Concert Producer / Director / Camera (12/2021)
  - Pacific Medical Administrative Group Internal Healthcare Videos: Director / Camera Operator / Editor (10/2020)
  - Magnum PI Behind the Scenes | Production Assistant (07/2018)
  - Matt Levi Investigates: Camera Assistant (05/2017) to 03/2018
  - PTC Closed Circuit and Online (Quick Turnaround Edit): Editor (01/2018)
  - Hawaiian Airlines (In Flight Music Video): Camera Assistant (07/2017)
  - El Capitan Lodge (PR Video): Director / Camera Operator / Drone Operator / Editor (06/2017)
  - HMSA (Oprah VNR): Editor (06/2017)
  - Hawai'i Tourism Authority (Henry Kaponu Live Stream): Camera Operator (05/2017)



**Aaron Krinsky, MS**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant – Video & AI Expert
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Science, Design, Business, and Technology, University of Southern California (2020) Bachelor of Arts, Philosophy, Yale University (2003)

**Overview**

Aaron is an accomplished and creative consultant with multifaceted experience and a proven ability to re-energize and restructure digital organizations, develop strategic initiatives, and capture emerging business opportunities. He is a results-oriented, decisive leader adept at forging lucrative relationships with key partners, vendors, clients, and employees.

**Experience**

**BerryDunn (06/2023 – present)**

As a Senior Consultant with BerryDunn’s Medicaid Practice Group (MPG), Aaron works with Medicaid clients to manage and support various aspects of video production and Medicaid-systems related media content development.

- **State of Hawaii (HI)**
  - Department of Human Services, Hawaii Med-QUEST Division
    - *Technology & Innovation SME (06/2023 – present)*

As the technology lead within his practice group, Aaron has led the development and creation of training modules for his client, utilizing his expertise and knowledge gained as an independent contractor for 2.5 years before joining the team as a BerryDunn employee. Key elements of this role include:

      - Designing the business processes to support module creation
      - Oversight of production and post-production elements of video editing
      - Working closely with the Learning Management System (LMS) team lead to create a seamless platform experience for users

**High-Touch Capital (HTC) (05/2012 – 2020)**

Aaron serves as a senior managing director where he manages revenue models, process flows, operations support, and customer engagement strategies. He evaluates diverse organizational systems to identify workflow, communication, and resource utilization issues; creates detailed roadmaps of action items and project goals and provides reporting and analysis to inform budgeting and planning; and provides updates to all stakeholders on key milestones for projects. In addition, Aaron contributes to the success of client organizations by improving



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performance, motivation, job satisfaction, hiring practices, training programs, and management systems, and by developing and deploying customer interfaces.

**Veomed, LLC (01/2008 – 05/2012)**

As a co-founder, Aaron developed a proprietary cloud-based software platform to facilitate the exchange of rich media content in the professional medical and healthcare space. He managed all branding, media, and marketing projects for the start-up. Including ground-breaking digital publishing initiatives with Columbia and NYU hospitals. Aaron was also responsible for coordinating fundraising, intellectual property, and complex legal arrangements for the company.

**IMAX (01/2006 – 01/2008)**

As a digital manager, Aaron coordinated and supervised the digital re-mastering (DMR) of film print production. He also facilitated department PO's, supervised dailies from the lab (CFI) for IMAX in-house screenings, coordinated internal shipments; and helped develop digital post-production workflows.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	Monthly status update on the Programmatic Managed Care Support Project.
2	Monthly Status Reports	Monthly status update on the Programmatic Managed Care Support Project.
3	Project Timeline	Timeline for the Programmatic Managed Care Support Project.
4	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
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
HIPAA	Health Insurance Portability and Accountability Act
IAPD	Implementation Advance Planning Document
LMPM	MMIS Project Manager
LPM	Lead Project Manager
MCO	Managed Care Organization
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
PPACA	Patient Protection and Affordable Care Act
RFA	Request for Application
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
State	West Virginia
USVI	United States Virgin Islands
WV	West Virginia
WVCHIP	West Virginia Children's Health Insurance Program


## Keyword Search

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Simple Search

Search Editor

☐ Any Words 

☐ All Words 

☐ Exact Phrase 

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

×

Entity



Location



Status



☒ Active

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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

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

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

Organization Information									
<b>Business Purpose</b>		5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)							
<b>Capital Stock</b>									
<b>Charter County</b>	Kanawha	<b>Control Number</b>		0					
<b>Charter State</b>	ME	<b>Excess Acres</b>		× Close					
<b>At Will Term</b>	A	<b>M</b>		Hi, I'm SOLO! I can help you file your Annual Report.					
<b>At Will Term Years</b>		<b>Pa</b>							

**Authorized  
Shares**

**Young  
Entrepreneur**

Not Specified

## Addresses

Type	Address
------	---------

**Designated Office  
Address**

209 WEST WASHINGTON STREET  
CHARLESTON, WV, 25302

**Mailing Address**

2211 CONGRESS STREET  
PORTLAND, ME, 04102  
USA

**Notice of Process  
Address**

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

**Principal Office  
Address**

2211 CONGRESS STREET  
PORTLAND, ME, 04102  
USA

Type	Address
------	---------

## Officers

Type	Name/Address
------	--------------

**Member**

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

**Member**

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

**Member**

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
------	--------------

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Report.

## DBA

DBA Name	Description	Effective Date	Termination Date
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BERRY DUNN

TRADENAME

3/21/2011

BERRY, DUNN, MCNEIL & PARKER,  
PLLC

TRADENAME

11/5/2019

DBA Name

Description

Effective Date

Termination Date

## Annual Reports

Filed For

2023

2022

2021

2020

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

Date filed

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

Tuesday, June 4, 2024 — 2:12 PM

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