




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: 05-31-2024

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 BMS2400000051 1	Procurement Folder:	1437522
Document Name:	Medicaid & Children's Health Insurance Program Enterprise Sy	Reason for Modification:	
Document Description:	Medicaid & Children's Health Insurance Program Enterprise Sy		
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 
	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: \$1,449,895.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE: *Tanaka 6/5/24*
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

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

Extended Description:

Medicaid & Children's Health Insurance Program Enterprise System Procurement Assistance Project Phase II

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

Total: \$1,449,895.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$13,975.00
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

65 hours @ \$215 = \$13,975.00

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	\$106,600.00
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

520 hours @ \$205 = \$106,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,087,020.00
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

6,039 hours @ \$180 = \$1,087,020.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$207,200.00
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

2,590 hours @ \$80 = \$207,200.00



May 17, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Medicaid and Children's Health Insurance Program (CHIP) Enterprise System (MCES) Procurement Assistance Project, Phase II under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2024.

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

Please let me know if you have any questions or if you would like to discuss the content in this SOW.

We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:

2DAAA44ADB3A477...
Peter Alfrey
Principal
207-541-2242

Ok


West Virginia Department of Human Services, Bureau for Medical Services

Medicaid & Children's Health Insurance Program Enterprise System Procurement Assistance Project Phase II

Staffing Plan and Scope of Work

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



Submitted by:

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

Nicole Becnel, PMP®, Principal
nbecnel@berrydunn.com

Peter Alfrey, PMP®, Principal
palfrey@berrydunn.com

Submitted On:

May 17, 2024



Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS) Bureau for the Medical Services (BMS) Medicaid & Children's Health Insurance Program Enterprise System Procurement Assistance Project, Phase II Project (MCES 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). The work completed under the Medicaid & Children's Health Insurance Program Enterprise System (MCES) project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and 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

This document intends to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the MCES Procurement Assistance.

The objective of this project is to plan and estimate implementation costs for the modernized MCES, which will aim to:

- Create Implementation Advance Planning Documents (IAPDs) to be submitted to CMS to help fund the implementation costs for the modernized MCES. Continue coordinating joint requirements planning (JRP) sessions to confirm specifications and requirements for the modernized MCES and to inform the development of draft Request(s) for Proposals (RFP).
- Develop draft RFP (s) to solicit competitive proposals to meet solution specifications and requirements according to technical and cost-evaluation criteria.
- Plan organizational transformation through integration of the MCES Procurement Assistance Project with current and future organization development (OD) projects.
- Support DoHS OD and the Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) by implementing a modular procurement strategy to procure, design, and implement MCES modules, updating the portfolio management integrator office structure, and providing data integration and technology advisory services.



The MCES Procurement Assistance Project will also aid the State in meeting several of its identified MITA-specific goals, such as:

- Improve the State's effectiveness and efficiency.
- Improve operational efficiency and reduce costs in the healthcare system.
- Promote an environment that supports flexibility, adaptability, and rapid response to changes in programs and technology.
- Promote an enterprise view that supports enabling technologies that align with Medicaid business processes and technologies.
- Improve the management of member and provider data so that it is timely, accurate, usable, and easily accessible to support analysis and decision-making for healthcare management and program administration.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- 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.
- MCES will support the development of up to two draft modular RFP(s)/Request for Quotation (RFQ[s]).
- 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 Deliverables will be provided in an agreed-upon format.
- The State leadership team will consist of Sarah Young as the BMS project sponsor and Brandon Lewis as the BMS project lead.
- The BerryDunn leadership team will consist of Peter Alfrey as the MCES portfolio manager and Mary Stewart as the project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- State staff with the required knowledge base to support the MCES Procurement Assistance Project will attend project-related meetings, including JRP sessions. If these individuals are unavailable or do not participate in the fact-finding interview sessions, the project schedule, scope, and cost might be impacted.
- Deliverables will be provided in an agreed-upon format.
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is



projected to continue for 13 months.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) IAPD for the purposes of this SOW. CMS previously approved the MMIS IAPD on February 27, 2024, for total State and federal funds in the amount of \$95,085,478 under project identifier WV-2024-01-08-MMIS-IAPDU-MITA. The estimated cost of the services to be delivered under this SOW is \$1,449,955.00 (included in the approved Advanced Planning Document (APD)). Therefore, any additional scope added to the services to be provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management activities to be delivered under this SOW.

2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members regularly to discuss project status and issues impacting the timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <p>Deliverable 1: Commissioner Briefing</p> <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be completed upon formal acceptance of the Project Closeout Summary by the BMS project sponsor or their designee.</p>	<p>Nicole Becnel</p> <p>Eduardo "Ed" Daranyi</p> <p>Peter Alfrey</p> <p>Mary Stewart</p>	260
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management assistance to support the facilitation and implementation of the previously prepared Strategic Plan for MCES modernization. In support of Project Execution and Control, BerryDunn leadership will meet with the project sponsor regularly to discuss project status and issues impacting the timely completion of the work and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn-owned, State-owned, and vendor-owned meetings, as needed 	<p>Nicole Becnel</p> <p>Eduardo "Ed" Daranyi</p> <p>Peter Alfrey</p> <p>Emily McCoy</p> <p>Mary Stewart</p> <p>Julie DuPuis</p> <p>Rick Hayward</p> <p>Ebony Carter</p> <p>Alison Barnett</p> <p>Marvin "Ed" Crawford</p> <p>Adam Bowman</p> <p>Jon Watkins</p> <p>MaryLou Banker</p>	3,494



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action items, decisions, issues, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location Maintaining the previously prepared Implementation Timeline including the plan and modular implementation approach for the modernized MCES <p><i>Deliverable(s)</i> Deliverable 2: Monthly Status Report</p> <p><i>Completion Criteria</i> Project Execution and Control will be completed upon successful completion of the project and formal acceptance of the Project Closeout Summary by the BMS project sponsor or their designee.</p>	Marnie Hudson Matt Oatten AJ Mong Sue Prior Christa Bernacchia Katie McDonald Shandia Benke Kourtney Kirk Cate Poling Hailey Holden Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton KD Dobyne	
3.0	<p>Procurement Advisory Services</p> <p><i>Service Approach</i> Utilizing the previously prepared Strategic Plan for MCES modernization, BerryDunn will provide procurement advisory services to support the activities surrounding the procurement(s) of MCES modules.</p> <p>During the pre-procurement phase:</p> <ul style="list-style-type: none"> BerryDunn will prepare for the JRP sessions by researching requirements specific to the proposed modules to confirm specifications and requirements for the modernized MCES and to inform the development of the draft RFPs/RFQs. Under the guidance of BMS, BerryDunn will engage the USVI in procurement planning activities such as: soliciting requirements to fit the needs of the USVI; providing requirements for review and approval; including requirements in JRP sessions and 	Peter Alfrey Mary Stewart Emily McCoy Susan Chugha Shea Berry-Brennan Brandon Milton Zachary "Zach" Rioux Jim Strassenburgh Jeff Stoddard Mary Stewart Julie DuPuis Rick Hayward Alison Barnett Ebony Carter MaryLou Banker Marnie Hudson	4,520



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>procurement development; and incorporating USVI feedback into the procurement.</p> <ul style="list-style-type: none"> BerryDunn will facilitate internal requirements sessions with BerryDunn team members who have experience with current DoHS policies and MES systems as well as documenting the as-is and to-be state of the current enterprise, including the inventory, review, and analysis of current reports, interfaces, and policy manuals to identify needed updates. BerryDunn will be responsible for meeting coordination, facilitation, and/or note-taking (when requested by the State) during discussions in which requirements may be impacted. BerryDunn will provide support for State and federal reviews of the RFP(s). During the procurement phase, BerryDunn will assist the State with the following: <ul style="list-style-type: none"> Facilitating the procurement(s) in collaboration with the State and other vendors. Facilitating responses for up to two rounds of vendor questions and responses. Developing proposal evaluation packets. Facilitating Evaluation Team meetings and scoring sessions, including organizing meetings, taking meeting notes, tracking action items, and participating as a non-voting advisory member. Provisioning of one subject matter expert (SME) review of each proposal. <p>Assisting with oral presentations, if applicable.</p> <p><i>Deliverable(s)</i></p> <p>Deliverable 3: Modular RFP(s)/RFQ(s)</p> <p>Deliverable 4: Vendor Question Responses</p> <p>Deliverable 5: Proposal Evaluation Packets</p> <p>Modular RFP(s)/RFQ(s) development drafts assume the development of up to two RFP(s)/RFQ(s) and will be completed upon submission of the deliverable(s) and formal acceptance of the Deliverable</p>	<p>Jon Watkins</p> <p>Matt Oatten</p> <p>AJ Mong</p> <p>Sue Prior</p> <p>Christa Bernacchia</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Janine DiLorenzo</p> <p>Jonathan "Jon" Williams</p> <p>Jordan Ramsey</p> <p>Megan Hamilton</p> <p>KD Dobyne</p>	



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Acceptance Forms (DAFs) by the BMS project sponsor or their designee.</p> <p><i>Completion Criteria</i></p> <p>Procurement Assistance will be considered complete when the State project sponsor or their designee formally accepts the Project Closeout Summary.</p>		
4.0	<p>IAPD Development</p> <p><i>Service Approach</i></p> <p>To support the implementation cost and requirements of the modular MCES, BerryDunn will develop and assist in facilitating the approval of IAPDs for each module to help ensure that the project maintains buy-in and financial backing from relevant federal partners.</p> <p><i>Deliverable</i></p> <p>Deliverable 6: Module IAPDs</p> <p><i>Completion Criteria</i></p> <p>The IAPD Development phase of the project will be completed upon formal approval of the Project Closeout Summary.</p>	<p>Mary Stewart</p> <p>MaryLou Banker</p> <p>Marnie Hudson</p> <p>Julie Bandy</p> <p>Dawn Webb</p> <p>Jason Hargrove</p> <p>AJ Mong</p> <p>Jon Watkins</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Janine DiLorenzo</p> <p>Jonathan "Jon" Williams</p> <p>Jordan Ramsey</p> <p>Megan Hamilton</p> <p>KD Dobyne</p>	480
5.0	<p>Purchasing Contract Management Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide the State with ongoing ad hoc procurement research, analyses, and assistance upon request.</p> <p><i>Completion Criteria</i></p> <p>The Purchasing Contract Management Support phase of the project will be complete upon formal approval of the Project Closeout Summary.</p>	<p>Peter Alfrey</p> <p>Mary Stewart</p> <p>MaryLou Banker</p> <p>Liz Vose</p> <p>Brody McClellan</p> <p>Julie Bandy</p> <p>Julie DuPuis</p> <p>Matt Oatten</p> <p>Jon Watkins</p> <p>AJ Mong</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p>	550



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton KD Dobyne	
6.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at the project close. Additionally, the Project Closeout Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <p>Deliverable 7: Project Closeout Summary</p> <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the State project sponsor or their designee formally accepts the Project Closeout Summary.</p>	<p>Nicole Becnel Eduardo "Ed" Daranyi Peter Alfrey Mary Stewart Liz Vose Jon Watkins Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton KD Dobyne</p>	40
Total Hours			9,344
Total Not-To-Exceed Cost Estimate			\$1,449,895



3.0 Project Resources and Hours

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

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

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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Optional Year 1					
9	EM	\$270	Nicole Becnel	130	\$35,100.00
8	LPM	\$215	Eduardo Daranyi	65	\$13,975
10	LMPM	\$205	Emily McCoy	520	\$106,600
11	GPM	\$180	Peter Alfrey	420	\$75,600
11	GPM	\$180	Liz Vose	480	\$86,400
11	GPM	\$180	Mary Stewart	915	\$164,700
11	GPM	\$180	MaryLou Banker	635	\$114,300
11	GPM	\$180	Alison Barnett	513	\$92,340
11	GPM	\$180	Rick Hayward	570	\$102,600
11	GPM	\$180	Marnie Hudson	415	\$74,700
11	GPM	\$180	Ebony Carter	90	\$16,200
11	GPM	\$180	Zach Rioux	10	\$1,800
11	GPM	\$180	Shea Berry-Brennan	10	\$1,800
11	GPM	\$180	Brandon Milton	10	\$1,800
11	GPM	\$180	Susan Chugha	30	\$5,400



CL					
Optional Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
11	GPM	\$180	Julie DuPuis	145	\$26,100
11	GPM	\$180	Julie Bandy	167	\$30,060
11	GPM	\$180	Brody McClellan	75	\$13,500
11	GPM	\$180	Jeff Stoddard	580	\$104,400
11	GPM	\$180	Jim Strassenburgh	570	\$102,600
11	GPM	\$180	Marvin "Ed" Crawford	175	\$31,500
11	GPM	\$180	Adam Bowman	189	\$34,020
11	GPM	\$180	Dawn Webb	30	\$5,400
11	GPM	\$180	Jason Hargrove	10	\$1,800
11	SS	\$80	Christa Bernacchia	25	\$2,000
12	SS	\$80	Matt Oatten	622	\$49,760
12	SS	\$80	AJ Mong	695	\$55,600
12	SS	\$80	Sue Prior	65	\$5,200
12	SS	\$80	Jon Watkins	695	\$55,600
12	SS	\$80	Hailey Holden	65	\$5,200
12	SS	\$80	Katie McDonald	65	\$5,200
12	SS	\$80	Cate Poling	26	\$2,080
12	SS	\$80	Kourtney Kirk	26	\$2,080
12	SS	\$80	Shandia Benke	26	\$2,080
12	SS	\$80	Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton KD Dobyne	280	\$22,400



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
Optional Year 1					
Total Hours:				9,344	\$1,449,895

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	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	10	0	40	380	155	585	\$91,700
Month 2	10	10	40	700	201	961	\$155,130
Month 3	10	10	40	700	250	1,010	\$159,050
Month 4	10	10	40	600	245	905	\$140,650
Month 5	10	0	40	480	235	765	\$116,100
Month 6	10	10	40	470	230	760	\$116,050
Month 7	10	10	40	465	225	750	\$114,750
Month 8	10	0	40	460	215	725	\$110,900
Month 9	10	0	40	450	201	701	\$107,980
Month 10	10	0	40	425	161	636	\$100,280
Month 11	10	0	40	380	160	590	\$92,100
Month 12	10	0	40	280	160	490	\$74,100
Month 13	10	15	40	249	152	466	\$71,105
Total	130	65	520	6,039	2,590	9,344	\$1,449,895



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task:	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 Procurement Advisory Services													
4.0 IAPD Development													
5.0 Purchasing Contract Management Support													
6.0 Project Closeout													



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

2D4AAA4ADB3A77

Signature

5/17/2024

Date

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

Basil Lee

Signature

5/29/24

Date

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

Shay Shui

Signature

5/29/24

Date



Appendix A: Resumes

Nicole Becnel, PMP®

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

Overview

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

Experience

BerryDunn (06/2010 – present)

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

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



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



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

WV Department of Human Services (DoHS)

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

Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

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

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

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

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

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



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

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



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

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

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

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

Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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



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

- **Project Manager for MIHMS Provider Enrollment**

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

- **WV MMIS**

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all budgets, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

- **Contract Configuration and Reports Lead for WV MMIS**

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

- **Project Management Support**

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

Presentations

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

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



Eduardo “Ed” Daranyi, MEd, PMP®

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

Overview

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

Experience
BerryDunn (09/2005 – present)

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

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

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

- *Engagement Manager (2012 – present)*

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

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



05/2021)

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



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



- *ICD-10 Compliance*
- *Eligibility and Enrollment (E&E) Systems Modernization*
- *Adult Quality Measures*
- *Centers for Medicare & Medicaid Services (CMS) Advance Planning Development*
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment*
- *Childrens Health Insurance Program (CHIP) Implementation and Stabilization*
- *Access to Care Planning and Monitoring*
- *Provider Re-enrollment*
- *Asset Verification System Procurement*
- *West Virginia (WV) CHIP Operational Readiness Review (2019 – present)*
Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three managed care organizations (MCOs) selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 present)*
Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supported technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
As engagement manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health



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

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

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

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

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

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

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



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

WV Department of Human Services (DoHS)

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

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

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

- *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.

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

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

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

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

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



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

Martin's Point Health Care (2005 – 2007)

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

Goold Health Systems (1999 – 2005)

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

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

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

- **Maine DHHS (05/2001 – 01/2002)**

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

Electronic Data Systems (1985 – 1988)

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



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

Presentations

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

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

Moderator, MESC Conference sessions (2015-2019)

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

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

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



Emily E. McCoy, RN, BSN, PMP®

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

Overview

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

Experience
BerryDunn (07/2016 – present)

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

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

WV Department of Human Services (DoHS)

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



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

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

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

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

- **Henrico County, VA**

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



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

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

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

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

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

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

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



informal education to providers regarding State Medicaid policies and reimbursement.

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

Charleston Area Medical Center (07/1996 – 12/2002)

- **Transitional Care Unit (05/1999 – 12/2002)**
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.
- **Neuroscience Unit (01/1998 – 05/1999)**
As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:
 - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care.
 - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations.
 - Serving as a representative on the Standards and Practice Council and Procedures sub-committee
 - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
 - Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients.
- **Behavioral Health Unit (07/1996 – 01/1998)**



Emily began her nursing career on the Behavioral Health Unit. Overall duties involved the advocacy of patients while providing direct patient care to individuals with mental illness.



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

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

Overview

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing portfolio and program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects and serving as a General Project Manager for the 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 multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various



regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as 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.



Liz Vose, MPA

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

Overview

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

Experience

BerryDunn (02/2022 – present)

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

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS) (07/2022 – present)**
 - *WV Mountain Health Promise (MHP) Re-Procurement Project (07-2022-09/2023)*

Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
 - *WV Mountain Health Trust (MHT) Re-Procurement Project (07/2022-06/2023)*

Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).
 - *WV Mountain Health Trust Phase II (11/2023- present)*

Liz serves as the Medicaid Project Manager and Managed Care SME
 - *WV Legislative Implementation Assistance Project (LIAP) (09/2023-10/2023)*

Liz served as the Medicaid Project Manager.



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

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

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

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

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

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

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

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



SUNY Albany (09/2011 – 12/2013)

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

HAVE Inc. (04/2007 – 08/2009)

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

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

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



Mary Stewart, MS

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

Overview

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

Experience

BerryDunn (01/2023 – present)

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

- **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



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 on-line web-based grant writing application.



MaryLou Banker, CAPM®, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Project Management Institute (PMI) Certified associate in project management (CAPM®) Certificate in Computer Operations, Computer Learning Center of Boston Certified in American Sign Language, Northeastern University Certificate in Six Sigma Green Belt 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 the IV&V resources. She participated in weekly meetings related to CMS Blueprint testing, test case verification for CMS scenario results, and submission of testing results to CMS for approval. She has experience with IBM Rational Quality Manager (RQM), IBM Rational Requirements Composer (RRC), and ALM automated testing tools (e.g., Selenium). In addition, she coordinated and conducted User Acceptance Testing, recorded test results, provided testing metrics, and requirement traceability reports.

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

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

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

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

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

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

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

MaryLou held multiple positions with GENUITY.

Supervisor, Desktop Services

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



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

Supervisor, IT Helpdesk

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

IT Helpdesk Analyst

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



Alison Barnett, CAPM®, ITIL (F)

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Certificate in Applied Project Management (CAPM®) Information Technology Infrastructure Library (ITIL) Foundation Certification

Overview

Alison brings over 25 years of experience in various roles in the pharmacy industry, including over 20 years working with IT projects related to pharmacy programs, specifically Medicaid. Her project management experience includes drafting of Requests for Proposals (RFPs), vendor procurement, implementation project management on both the State and vendor sides, leading JAD sessions, vendor management, developing, executing and validating testing, risk management, creating and facilitating training, and managing resources. Her experience managing IT pharmacy projects specifically for Medicaid gives her insight into many of the unique risks and challenges associated with delivering these projects on time and under budget.

Alison led Indiana, Ohio, Illinois, and Wyoming in the Certification of their Pharmacy Benefits Management (PBM) Modules and is familiar with the Center for Medicare & Medicaid Services (CMS) Outcomes-Based Certification (OBC) process. She assists clients in navigating through the certification process. She brings knowledge of drug pricing methodologies, National Council for Prescription Drug Programs (NCPDP) transaction sets, Health Insurance Portability and Privacy Act (HIPAA) policies, and associated industry standard transaction sets.

Experience
BerryDunn (11/2022 – present)

- **State of West Virginia (WV) Medicaid (06/2023 – present)**

As a senior consultant, Alison works directly with the business and technical SMEs who currently manage the day-to-day operations of the pharmacy benefits for the WV Medicaid program. Alison is currently taking the lead on drafting the pharmacy requirements. She also aids in the SMC process, helping to ensure that the required CMS Outcomes are met.

- **Iowa Medicaid (12/2022 – present)**

As a senior consultant, Alison works directly with the business and technical Subject Matter Experts (SMEs) who manage the day-to-day work of the pharmacy and procurement teams to draft a new RFP to procure pharmacy benefit management and clinical management services, including prior authorization. Alison assists with contributing knowledgeable content in terms of requirements development and



performance measures while also weaving in the CMS Outcomes Measures for Streamlined Medicaid Certification (SMC).

Change Healthcare (2017 – 10/2022)

As a CMS Certification lead and project manager, Alison led the Evidence Development process for Wyoming PBM CMS Certification, as well as led the on-site review with CMS and their partner MITRE for OH, IL, and WY. She also led the Medicaid Information Technology Architecture (MITA) third-party assessment of Change Healthcare processes/platforms and the R3 Milestone review for State of IL PBM Module.

Advocate Solutions (2014 – 2017)

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

Catamaran (formerly SXC) (2012 – 2014)

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

Fusion Alliance (2010 – 2011)

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

HP Enterprise Services (formerly EDS) (2007 – 2010)

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



collecting National Drug Codes on physician administered drugs for the purpose of drug rebate in accordance with the Deficit Reduction Act, and update to pricing methodology for physician administered drugs.

Electronic Data Systems (EDS) (2004 – 2007)

Alison supported business design for system changes by assisting in the design, development, and implementation (DDI) of the Pharmacy Claims Adjudication system for Indiana Medicaid. This included configuring and maintaining the Preferred Drug list and benefit plan design, delivering provider and employee training for pharmacy-related Indiana Medicaid policy, and leading user acceptance test case development and execution of over 5000 test cases.

ACS State Healthcare PBM (2003 – 2004)

As a client relations specialist, Alison maintained PDL and benefit plan configuration for Indiana Medicaid. She also delivered provider and employee training for pharmacy-related Indiana Medicaid policy.

Health Care Excel-PBM (2002 – 2003)

Alison served as a clinical criteria reviewer for the Indiana rational drug program for Indiana Medicaid. She applied criteria and worked with PCDS system extensively to override claims for providers and assist them in processing online Medicaid prescription claims.

Wal-Mart Pharmacy (1993 – 1999)

Alison served as the head pharmacy technician, handling billing for Medicare and Medicaid including the CMS 1500 form and pharmacy paper claims.



Rick Hayward

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

Overview

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

Experience

BerryDunn (12/2023 – Present)

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

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

WV Bureau for Medical Services (BMS)

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

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

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

Rick worked as an Operations Manager with Maine, where he provided oversight of the day-to-day MMIS operations activities of the State's fiscal agent. In this position, Rick addressed



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

Protech Solutions (10/2019 – 04/2021)

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

State of Maine (09/1996 – 10/2019)

- *Director of Applications (04/2014 – 10/2019)*

Rick supported the IT needs of a Portfolio of 17 state agencies, 200+ applications, and an approximate \$40 million budget leveraging a team of 77 staff in agile software development projects in this position reporting directly to the Chief Information Officer (CIO). His experience included overseeing change management for the IT organization, managing risks, the decommissioning of multiple legacy systems, and management of business and technical requirements related to system changes.

- *IT Manager (04/2005 – 04/2014)*

In this role, Rick supported Medicaid and Human Services systems utilized by the Behavioral Health and Eligibility units including oversight responsibilities, data analytics, deployments of system enhancements, multiple vendor relationship management, and technical and change management team leadership. He also led the state development team during the ACA implementation for the State of Maine partnering with the state DHHS business management to modify the Medicaid Eligibility system to meet federal guidelines for Maine's leverage of and interaction with the Federal Exchange.

- *Systems Team Lead (09/1996 – 04/2005)*

As Systems Team Lead, Rick led projects supporting applications serving DHHS Substance Abuse, Adult Mental Health, and Mental Retardation Bureaus and the two state Psychiatric Hospitals, including a \$5 million Enterprise Information System.

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



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

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

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

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

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

Education and Certifications

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



Marnie Hudson, CCP

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

Overview

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

Experience
BerryDunn (11/2017 – present)

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

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

- *Eligibility and Enrollment Implementation Assistance (02/2018 – present)*

- As a Requirements Lead on the People's Access to Help (PATH) project, Marnie is supporting the success of West Virginia's IES project, which will consolidate and integrate DHHR program service systems into a single enterprise. She manages and tracks the PATH Requirements Traceability Matrix to help ensure each project release supports DHHR's program business needs. She participates in configuration design sessions to help ensure the vendor is accurately understanding and capturing stakeholders' business needs and supporting business rules. In addition, she reviews and provides input on project deliverables, and she assists with project activities associated with requirements, including the



review and validation activities for the Document Inventory (forms, letters, notices) of all legacy systems. Marnie also provides monthly and periodic status reports for Requirements and Design, including the readiness of each project release.

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

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

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

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

S2Tech/Conduent (07/2016 – 05/2017)

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

S2Tech/Xerox (02/2013 – 07/2016)

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

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

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

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

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

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

As a senior business analyst, Marnie maintained compliance with Centers for Medicare & Medicaid Services (CMS) mandates and initiatives through various programs in Medicare,



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

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

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



Ebony Carter, MS, PMP®

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

Overview

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

Experience

BerryDunn (03/2022 – present)

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

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

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

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



assisted with tasks related to updating the APD document.

- *Medicaid Information Technology Architecture (MITA) 3.0 SSA Maintenance and Annual Update Assistance Project (11/2022 – present)*
Ebony is serving as a SME assisting with the update of the Health Information Technology (HIT) report, MITA lifecycle maintenance activities and update MITA related reports.
- *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*

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

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (09/2023 – present)*
Ebony serves as an MMIS SME on the West Virginia Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project.
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (09/2023 – present)*
Ebony serves as a MMIS SME on the West Virginia Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project.

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

- *Forensic Accounting/Auditing (06/2023 to 09/2023)*
Ebony served as a SME to analyze claims processes and procedures, identified potential program integrity risks and reviewed payment activity post reimbursement to providers.

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

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

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

Ebony worked as a Data Processing Subject Matter Expert with CMS to provide technical



direction and guidance to the data processing team and to CMS stakeholders. She created training material in line with CMS guidelines and federal regulation requirements, updated standard operating procedure guidelines for team, and monitored data processing workflow. Ebony performed quality assurance reviews of completed audits, conducted queries, and communicated data findings in written reports, oral reports, and presentations. She analyzed data to determine appropriate actions and was responsible for determining knowledge gaps, work process improvements, and technical system updates to assist with creating streamlined audit process. She created a review schedule to ensure milestones were met on time and reviewed all state MMIS systems to ensure claims adjudicated correctly, beneficiaries were eligible for services, and providers were enrolled and screened appropriately.

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

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

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

Ebony worked as an Agency Grant Specialist to monitor the life cycle of all grants and the budget and expenditures for DHMH Office of Preparedness and Response (OPR) cooperative agreements for the Department of Health and Human Services, Center for Disease Control and (CDC) and Prevention and Assistant Secretary for financial Resources (ASPR). She supported senior management in maintaining fiscal records of preparedness activities such as syndromic surveillance, plan implementation, incident reports, and after-action reports. She designed, developed, implemented, and interpreted grants assistance management policies, procedures, and best practices for monitoring cooperative agreements for CDC and ASPR. Ebony monitored a budget over \$30 million and was responsible for accounts payable paid by invoices used pay blocks according to the state of Maryland General Accounting principles. She developed standard operating procedures that adhere to CFR and Code of Maryland Regulations (COMAR) regulations, developed information packages for employees and awardees, and served as liaison to represent senior fiscal officer at staff meetings and conferences. Ebony



monitored 23 counties and 1 city in the Medicaid Transportation Grant program for budget requirements and to ensure grantees and providers followed program goals, objectives, and regulations in accordance with CFR and COMAR). She analyzed and evaluated the program for efficiency and effectiveness of health care delivery and health initiatives by participating in routine audits (onsite reviews) of each jurisdiction ensuring compliance with COMAR regulations, Medicare and Medicaid regulations, and Maryland State Transmittals. She analyzed data for recipient Medicaid transportation needs, supported senior analyst in providing leadership and Medical Assistance Transportation guidance to state legislatures during conferences and workshops, and provided guidance on Managed care or Medicaid fee-for-service appeals. She managed, developed, implemented, and evaluated training curricula on Medicaid Managed Care, and Medicaid Transportation program. She developed standard operating procedures in drafting COMAR regulations to improve compliance with state and federal Medicaid and Medicare regulations.



Zachary “Zach” Rioux, PMP®, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Science in Political Science and Psychology, University of New England Certified Project Management Professional Prosci® Certified Change Management Practitioner (CCP) Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Zach is an experienced project manager and health information technology (IT) professional with a proven record leading successful projects and project management organizations for state Health and Human Service (HHS) agencies. As a senior manager within BerryDunn's Government Consulting Group, Zach has managed Medicaid Management Information System (MMIS) implementation and certification efforts, facilitated multiple state HHS strategic planning and procurement efforts, and directed portfolios of work focused on strategic planning, data management, and project management related initiatives. Zach brings comprehensive knowledge of project management, state IT procurements, Centers for Medicare & Medicaid Services (CMS) certification, vendor management, and health IT system implementations. Zach's ability to bring together, manage, and partner with large, cross-functional teams makes him an integral resource to any State HHS agency looking to improve its health IT enterprise.

Experience

BerryDunn (05/2013 – present)

Zach is a principal and project manager dedicated to working with state agency clients across industries, including health and human services and Medicaid agencies. Zach has utilized his experience, knowledge, and expertise to support a variety of projects across a variety of states. In WV, Zach has supported the client by leveraging industry best practices and DoHS initiatives to develop Enterprise Program Management (EPM) processes, checklists, and templates; defining and implementing processes by which agencies could identify and manage project priorities; streamlining and enhancing decisions across the enterprise; and facilitating the development and approval of over six annual Advance Planning Documents. Zach continues to support efforts facilitation and gathering of RFP specifications; procurement facilitation and the development of the RFP; project status tracking, maintenance, and reporting to CMS; and finalizing and sequencing data visioning activities to most efficiently and effectively integrate data sources across the enterprise into various State databases, data marts, and data warehouses.



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

- **WV Department of Health and Human Resources (DoHS) (05/2013 – 12/2019)**

- *Program Manager*

- *Enterprise Portfolio Management Office (EPMO) Project (09/2018 – 12/2019)*
 - *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 – 12/2019)*

- *Deputy Project Manager*

- *Eligibility and Enrollment RFP Development Assistance (10/2015 – 02/2017)*

Zach served as the deputy project manager on the eligibility and enrollment RFP assistance project. On this project, Zach was responsible for managing the development of content included in the RFP and APD, facilitating the RFP evaluation phase, and tracking progress against the project schedule to help ensure milestones are achieved on time. Zach also assisted with communications to federal agencies including CMS, the Administration for Children and Families (ACF), and the Food and Nutritional Service (FNS).

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

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

Zach is currently serving as an engagement manager for BerryDunn's FFY2021-2202 EOMC services SOW with the Puerto Rico Medicaid Program (PRMP). In this role, Zach is responsible for managing over 22 resources and providing oversight, guidance, and expertise in support of development of a roadmap for the organizational integration of Puerto Rico's resources, technology, and business processes into the Medicaid enterprise; providing integrated Medicaid Enterprise System (MES) program management support for MMIS, E&E, and HIT initiatives across PRMP's MES; and enhancing PRMP's current project and program management practices. Additionally, Zach provided project support for facilitation of three OBC efforts for PRMP's MES; development of approximately twelve APDs, and facilitation of each APD through CMS' review and approval process; and completion of two MITA SS-As and the development of PRMPs MITA Concept of Operations (COO), Data Management Strategy (DMS), Technical Management Strategy (TMS), MITA Roadmap, and Business Process Models (BPMs). Zach also helped oversee security, privacy, and data governance support for PRMP's Security Office, including completion of annual MARS-E and NIST Security Assessments.

This role also requires Zach to maintain responsibilities such as facilitation of discussions among CMS, PRMP, RedMane (Eligibility and Enrollment [E&E] system integrator), DXC (MMIS system integrator), Intervoice (PMO), V2A



(organizational change management vendor), TrueNorth (Legacy E&E vendor), and Wovenware (local interface integrator); delivering on all EOMC services and maintaining an annual budget of approximately \$7.4 million; oversight, guidance, and management in support of the development and execution of project deliverables and artifacts; adherence to contract requirements, scope, services, timelines, and budget; and development, maintenance, and/or enhancement of CMS, PRMP, and vendor relationships across the PRMP MES.

- *Federal Fiscal Year (FFY) 2020 Health Information Technology (HIT) Enterprise Objective Monitoring and Control (EOMC) Services (04/2020 – 09/2020)*

During FFY2020, Zach served as the engagement manager for the FFY2020 Puerto Rico HIT EOMC Services SOW. In this role, Zach was responsible for providing oversight of approximately three resources, while also ensuring that the HIT EOMC services SOW was managed in a coordinated fashion with the FFY2020 PREE and MMIS EOMC SOWs. As the engagement manager, Zach's responsibilities included facilitation of discussions amongst ONC, CMS, PRMP, HealthGorilla (HIE system integrator), Intervoice (PMO), and other vendors to assist in the planning and implementation of an Health Information Exchange (HIE) and Enterprise Data Warehouse (EDW); oversight of an assessment of the current Health Information Technology (HIT) landscape (business, technical, infrastructure, security, etc.); oversight and support for the integration of HIT assets into the MITA SS-A framework to help maximize enhanced federal financial participation (FFP) for PRMP; and oversight to assist in updates to Puerto Rico's State Medicaid Health Plan (SMHP).

Additionally, Zach provided support, assistance and subject matter expertise for the development of an HIT and HIE APD; facilitated discussions with CMS, ONC, and/or PRMP relating to the HIT and HIE APD's review and approval; and delivered on all HIT EOMC services and maintaining a budget of approximately \$1 million within a single FFY.

- *Federal Fiscal Year (FFY) 2020 Puerto Rico Eligibility and Enrollment (PREE) Enterprise Objective Monitoring and Control (EOMC) Services (11/2019 – 09/2020)*

As the engagement manager for BerryDunn's FFY 2020 PREE EOMC Services SOW, Zach facilitated, provided oversight, and managed a team of four resources in support of PRMP's PREE system implementation and OBC effort. In this role, Zach also helped to ensure the FFY 2020 PREE EOMC services SOW was managed as a single portfolio in conjunction with the FFY 2020 MMIS Phase Two EOMC Services SOW and the FFY2020 HIT EOMC Services SOW. As an engagement manager, Zach was also responsible for facilitating discussions and/or providing guidance to inform discussions amongst CMS, PRMP, Intervoice (PMO), RedMane (Eligibility and Enrollment [E&E] system integrator), Wovenware (local interface integrator), V2A (organizational change management vendor), and NTT Data (IV&V vendor); providing subject matter expertise and project management expertise in support of the PREE system implementation and certification effort; identification of PREE implementation issues and/or risks as well



as proposed resolution or mitigation strategies; guidance, management, and expertise to help facilitate and execute PREE OBC discussions, and planning efforts; and delivering on all PREE EOMC services and maintaining a budget of approximately \$1.1 million within a single FFY.

- *Federal Fiscal Year (FFY) 2020 Medicaid Management Information System (MMIS) Phase 2 Enterprise Objective Monitoring and Control (EOMC) Services (10/2019 – 09/2020)*

As the engagement manager for BerryDunn's MMIS Phase Two EOMC Services SOW, Zach helped PRMP achieve and then maintain CMS certification of their MMIS Phase One functionalities while at the same time helping them to obtain CMS certification of their MMIS Phase Two initiative. In this role, Zach also helped to ensure the FFY 2020 MMIS Phase Two EOMC Services SOW was managed as a single portfolio in conjunction with the FFY 2020 PREE EOMC Services SOW and the FFY2020 HIT EOMC Services SOW. Zach supported the project by providing oversight, guidance, and leadership to one project manager, one deputy project manager, four leads, and four additional business analysts/subject matter experts; facilitating discussions amongst CMS, PRMP, DXC (MMIS system integrator), and Intervoice (PMO vendor); collaborating with PRMP and the BerryDunn team to complete over thirty-five project deliverables, including, but not limited to, status reports, MITA SS-A documentation, Desk-Level Procedures (DLPs), contract recommendation memorandums, Advance Planning Documents (APDs), guidance on contract management best practices, financial management assessment, PRMP MITA business process Key Performance Indicators (KPIs), vendor operations to PRMP personnel transition plan, and a closeout report; and delivering on all EOMC services and maintaining a budget of approximately \$3.8 million within a single FFY.

Additionally, Zach supported the project team by providing oversight, management, and support to help PRMP resolve outstanding action items from the MMIS phase one OBC effort; providing oversight and management of an OBC effort for MMIS provider enrollment and case tracking functionality; facilitating, providing subject matter expertise, and developing six APDs for Puerto Rico's MMIS, E&E, and HIT related Medicaid enterprise functional areas; facilitating discussions amongst PRMP and CMS to help achieve CMS approval on six APDs for their MMIS, E&E, and HIT related Medicaid enterprise functional areas; facilitating and develop tools to aid PRMP in maintaining their Medicaid enterprise APDs; and providing management and oversight of over three resources to complete Puerto Rico's 2018 – 2019 MITA SS-A and Roadmap and to a team of three resources responsible for the development of five contract recommendation memorandums focused on providing recommendations for issues and/or risks within PRMP contracts.

- *Enterprise Objective Monitoring and Control (EOMC) Services (06/2019 – 09/2019)*
Zach was a business analyst, SME, and then a project manager in support of the PRMP's efforts to obtain CMS certification of program integrity,



enterprise/technical, encounter processing, and data warehouse related MMIS functionalities. These MMIS related functionalities were Puerto Rico's first MMIS and first CMS certification effort. Additionally, this CMS certification effort was a pilot of CMS' OBC. Zach's responsibilities in support of the OBC effort included, but was not limited to providing subject matter expertise, business analyst, and project management support to PRMP to help achieve CMS' OBC approval of the aforementioned MMIS functionalities; collaborating with the Puerto Rico OBC Work Group (OBC WG) comprised of representatives from CMS, MITRE, PRMP, DXC (system integrator), and Intervoice (PMO); facilitating discussions amongst the OBC WG to help obtain CMS' certification and approval of PRMP MMIS functionality; collaborating and leading a team of four business analysts and SMEs; and helping PRMP to prepare for CMS on-site reviews and presentations. Additionally, Zach helped with facilitating the review of certification evidence prior to submission to CMS; facilitating and/or contributing to the development of objective and independent assessments on the status of PRMP's certification effort; and facilitating and/or contributing to the development of CMS Progress Status Reports

- ***Technical Information and Enterprise Project Management Services (TEPMS) Project (05/2017– 07/2018)***
 - Zach served as the project manager for the TEPMS Project, and provided project management, strategic planning, and subject matter expertise to aid in meeting several MITA SS-A goals and objectives. As the project manager, Zach was also responsible for oversight and assistance in project status, budget, and resource tracking, maintenance, and reporting, as well as escalating project risks and issues to client executives.
- ***MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (12/2016 – 01/2017)***
 - Zach served as a business analyst for the 2017 MITA SS-A and assisted the State in successfully completing its annual MITA SS-A. Zach's focus for assistance was primarily in the MITA business process area of Plan Management.
- ***Project Management of MMIS Procurement, DDI, and Certification (05/2014 – 10/2016)***
 - Zach served as the project lead, overseeing teams for the following areas: Operations Management: Oversight of the Fiscal Agent and BMS & Office of Management Information Services (MIS) MMIS Operations during the MMIS DDI Post Implementation and Stabilization period; Change Management: Oversight of the Fiscal Agent, BMS, and MIS change management process to ensure compliance with state and federal change management policies; Documentation Management: Oversight of all documentation submitted by the MMIS Fiscal Agent and State for compliance with federal and State policy, contractual requirements, and quality standards; and Certification Management: Oversight and assistance



successfully completing the WV MMIS CMS Pilot Certification Process with the State and MMIS Fiscal Agent.

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

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

- ***Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 – 08/2016)***
 - Zach served as the project manager for the Access to Care Monitoring Phase. In this role, Zach oversaw a team of six BerryDunn professionals and worked closely with key State stakeholders to develop a West Virginia Access Monitoring Review Plan. The plan identified data baselines, thresholds, assumptions, and trends and incorporated provider and beneficiary feedback to the extent necessary for the State to monitor access to care, implement improvement strategies, and comply with CMS requirements outlined as a part of 42 CFR 447.
- ***MITA 3.0 SS-A Assistance Project (05/2013 – 08/2013)***
 - Zach worked with BMS staff and BerryDunn consultants to create training packets on the SS-A, in particular working on documents that illustrated the differences between the MITA 2.0 framework and MITA 3.0 framework.
- ***PPACA Planning, Analysis, and Implementation Support (05/2013 – 08/2013)***
 - Zach was responsible for monitoring national Medicaid calls and taking notes to record the pertinent information and points of interest. He also worked on creating performance measures for Medicaid-related business processes.
- ***New Jersey Division of Medical Assistance and Health Services***
 - ***MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 09/2017)***
Zach served as a subject matter expert for the West Virginia/New Jersey Leverage and Reuse Project to supply as-needed subject matter expertise in the areas of system integration testing, user acceptance testing, operational readiness testing, APD development, and deliverable review.
- ***Vermont Department of Liquor Control (DLC)***
 - ***RFP Development, System Selection, Contract Negotiation, and Project Management for Retail and POS Solution (05/2014 – 02/2015)***
Zach served as a project management assistant for the DLC Retail and POS System implementation. This multi-year software and hardware implementation involved the configuration, design, and deployment of a new solution for DLC and the approximately 80 contracted liquor retail agents throughout the State. Zach's duties included assisting in management of project scope, schedule, and cost,



conducting regular status meetings, preparing status reports, and continuous communication with project stakeholders.

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

- *IT Roadmap and Staffing Plan (06/2013 – 08/2013)*

Zach worked with BerryDunn consultants and the Massachusetts OSA on an IT staffing project, assisting with several tasks, including developing an electronic survey, monitoring responses, and analyzing open-ended responses so that the information could be quantified and summarized; writing several sections of the state's IT Staffing Plan based on the information he compiled from the survey; and researching and compiling disparate information into coherent and well-organized appendices.

- **Massachusetts HIX/IES Entities**

- *IV&V Services (05/2013 – 08/2013)*

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

US Senator Susan M. Collins (05/2011 – 12/2012)

As an assistant in two of Senator Collins' offices, Zach assisted constituents and staffers with a variety of tasks and wrote professional letters and memos for Senator Collins.

Presentations

"Innovation in a Digital Era: Using Data to Pivot to 'the New,'" Presentation for MESC 2016, Co-presented with Peter Alfrey (BerryDunn), Drew Boston (Accenture), and Michael Kovach, 8/17/2016.



Shea Berry-Brennan, MBA, PMP®, CCP

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

Overview

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

Experience

BerryDunn (05/2013 – present)

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

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

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

- *Provider Enrollment (PEA) Year 2 Project*
 - *Access to Care Monitoring*
 - *Provider Incentive Payment (PIP) Audit Year 7 Project*

- *PEA Project (08/2014 – 12/2016)*

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



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

Shea served as the project management lead on the Bureau's MMIS implementation. She maintained the project risk and issue log and oversaw the process by which they were escalated to the client. She was also a liaison between the State and the Vendor to address and remediate issues. This required that she facilitate executive level stakeholder meetings with the State, the MMIS Vendor, and CMS. Shea also served as a design track lead for the utilization management, care management, provider management, and general/technical tracks. For each track, she was responsible for managing the repository of action items, organizing resources, and tracking decisions. She was also responsible for analyzing Vendor deliverables aligned with her tracks to help ensure the correct project documentation has been provided and is available for future use.

WV Department of Human Services (DoHS)

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

Shea served as the project lead for the DoHS Office of Management and Information Services' (MIS') eligibility and enrollment Vendor transition project. WV had a condensed time frame to transition the maintenance and operations of its existing eligibility system from one Vendor to another. Shea led and facilitated key knowledge transfer and the resolution of critical project issues. Additionally, she managed a team of five in supporting MIS in deliverable review, risk and issue tracking and mitigation, and executive status reporting.

- *Eligibility and Enrollment RFP Development Assistance (10/2015 – 01/2016)*

Shea served as the requirements manager for this project. As a member of the project management team, Shea supported the development of the approach to gather requirements from the State agencies that are targeted for inclusion in the RFP, including the Child Care system, the SACWIS system, the Child Support System, and the core eligibility and enrollment solution that services a variety of assistance programs including Medicaid, CHIP, SNAP, TANF, LIEAP, and other WV specific assistance programs. Shea led the requirements development process, facilitated JRP sessions, and escalated risks and issues to impacted stakeholders. Shea developed responses to Vendor questions and created the final question and answers procurement document for the engagement. She also led the development of the evaluation materials and scoring methodology for the procurement, and led and facilitated the evaluation committee during scoring sessions. Finally, Shea led the team in supporting the State with the development of the final procurement packages, including providing consulting services to both the State and the Federal Partners during the review of the final selection.

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

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

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



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

Additionally, Shea leads BerryDunn's project management support services. For this portion of the project, Shea focuses on vendor management support, including contractual compliance monitoring and escalation; extensive policy and procedure review and updates; overseeing implementation activities, such as developing an implementation plan, assisting with pilot activities, establishing KPIs and monitoring mechanisms, and rewriting job descriptions; planning for release cycles, including design, testing, and operational readiness; and supporting the development of an effective leadership team prepared to guide their teams through change, including offering strategic change management services. Shea also participates in redesigning processes to improve the quality, accuracy, timeliness, and efficiency of the services provided; managing the implementation of a new client service delivery model that will positively transform the organization for MQD's staff and the clients they serve; and managing Hawai'i's AVS system implementation, including Vendor management and conflict resolution between multiple service vendors (for AVS and the eligibility system).

- **Missouri Office of Administration Information Technology Services Division**
 - *State Medicaid IT Assessment Project (07/2019 – present)*
Shea serves as the consulting manager for the Missouri State Medicaid IT Assessment Project. For this project, Shea is leading the assessment of the State's current IT governance approaches and the development of short- and long-term recommendations. BerryDunn will develop a recommended future IT Governance Model. Shea is also responsible for managing all resources, the budget, all deliverables, service level agreements, and risks and issues.
- **Alaska Division of Health Care Services (HCS)**
 - *MMIS Fiscal Agent Solicitation Consultant Services (09/2020 – 02/2021)*
The BerryDunn team assisted HCS with visioning, researching, and developing a future MMIS solicitation, including Vendor transition support. This included an extensive current State assessment, including staff assessments, web-based research, options analysis, competitive analysis, and cost research; and a final MMIS Modernization Recommendations Report was provided. Shea was the lead



reviewer of this report, which provided multiple future strategic MES modernization options.

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

- *IV&V Services (10/2018 – 09/2019)*

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

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

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

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

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

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

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

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

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



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


Brandon Milton, MBA, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Master of Business Administration, University of New Hampshire Bachelor of Science, Business Administration and Political Science, University of Maine Project Management Institute (PMI) Certified Project Management Professional (PMP®)

Overview

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

Experience
BerryDunn (07/2011 – present)

Brandon specializes in working with Medicaid agency clients. He helps provide valuable project management and oversight of a variety of Medicaid clients. Brandon helps support project teams across a wide variety of workstreams, such as those related to planning, execution, and control, business process mapping, detailed system design development, Centers for Medicare & Medicaid Services (CMS) certification, system integration and testing, and quality assurance.

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

WV Bureau for Medical Services (BMS)

- *Substance Use Disorder (SUD) Waiver Initiative Phase 1 Project (02/2016 – 07/2017)*

Brandon served in the role of project manager for the development of an 1115 Waiver to create a continuum of care for Medicaid beneficiaries with an SUD in West Virginia. He led a team of policy experts and actuarial analysts to develop the concept for the delivery system and determine the budget neutrality for the waiver services. His work also included the development of an implementation plan for the waiver. The waiver received CMS approval in fall of 2017.

- *Project Management of MMIS Procurement, DDI, and Certification (07/2011 – 10/2016)*



Brandon served as the lead project manager for the DDI and certification for the West Virginia MMIS. His work on the project included managing a core team of 17 individuals and approximately 30 full-time equivalents. The project team had responsibility for handling workstreams such as facilitation of requirements validation sessions, business process redesign sessions, and system design sessions; quality assurance reviews of the vendor deliverables, including Project Management Plans, detailed system design documents, business process mapping documents, security, privacy and confidentiality plans, system integration test cases, provider documentation, operational readiness and training plans, and CMS Certification evidence. Additionally, Brandon supported planning and execution of user acceptance testing, planning and quality assurance reviews of CMS certification evidence, planning and execution of operational readiness testing, and oversight of service level agreements and system performance in operations. The WV MMIS went live in January of 2016 and the State received their certification letter from CMS in October 2016.

- *Data Warehouse/Decision Support System (DW/DSS) Project Management (02/2012 – 12/2014)*

Brandon provided project management and quality assurance services for the BMS' DW/DSS implementation. As part of this effort, he facilitated business process redesign sessions with the Program Integrity staff to align their business processes with the new case management system. He also facilitated requirements validation sessions; worked with the State in identifying potential data suppliers; and worked with the selected suppliers to determine the data feeds they will provide the DW/DSS. He facilitated design sessions between the State, data suppliers, and vendor to determine the data elements that would make up each of the data feeds. In addition, he developed test cases for UAT to provide end users with assurance that the system processes information according to requirements.

- *Provider Enrollment (PEA) Project*

Brandon provided project management support for the DDI of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He created status reporting deliverables and assisted the project manager in executing the project according to the project management plan.

- **Missouri Department of Social Services**

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

Brandon provided project management oversight and subject matter expertise for the development of evidence packets for CMS gate reviews of MEDES. This work included identification and validation of system evidence to align with the checklist



criteria from the new Medicaid Eligibility and Enrollment Toolkit (MEET) that CMS released in August of 2017.

- **Alaska Division of Health Care Services (HCS)**
 - *MMIS Fiscal Agent Solicitation Consultant Services (09/2020 – present)*
Brandon is the project principal for BerryDunn's team overseeing the work performed by our project team, assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
 - *Organizational and Business Process Redesign (07/2017 – present)*
Brandon is currently serving in the role of project director / IT lead for a business process redesign effort for the customer-facing sections of Hawaii's MQD. His work includes identifying opportunities for the State to leverage its new Medicaid eligibility determination system to improve efficiency and the customer experience. Phase two of the project just completed, which culminated in a findings and recommendations report that included recommendations for organizational transformation of eligibility offices and call centers.
- **New Jersey Division of Medical Assistance and Health Services**
 - *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 09/2017)*
Brandon served in the role of certification lead for the New Jersey MMIS replacement project. In this role, Brandon worked closely with the Implementation Team Office managers, the system vendor, and IV&V to plan for the certification of the replacement MMIS using the latest federal rules and regulations published by CMS. His work included leading a team of subject matter experts in the review of State policies and system requirements for alignment with certification criteria as well as system documentation that provides evidence of compliance for each of the certification checklist items.

Office of US Senator Susan M. Collins (2007 – 2010)

As mail director for the Office of U.S. Senator Susan M. Collins, Brandon was responsible for designing, implementing, and managing process improvements to streamline paperless mail operation involving a staff of 75 across eight offices in Maine and Washington, D.C. He reduced response time to constituent inquiries from 30 days to as little as two days and downsized the mailroom staff from four to two employees. In addition, he supervised legislative correspondents and interns; screened and edited outgoing correspondence on behalf of Senator Collins; and created and managed an amendment tracking system for major legislation, including the FY2010 budget, the American Recovery and Reinvestment Act (ARRA) of 2009, and multiple appropriation bills.

Presentations



"West Virginia MMIS Certification Pilot," Presentation for MESC 2015, Co-presented with Edward Dolly (West Virginia Department of Health and Human Resources) and Chris Green (Molina Healthcare), 8/19/2015.



Susan Chugha, CCP

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

Overview

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

Experience

BerryDunn (10/2015 –present)

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

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

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

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

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

Prior to moving into the project manager role during the implementation phase of



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

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

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

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables.

Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

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

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

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

As program manager, Susan oversees the project and BerryDunn team that handles updates to State Plan sections, attachments, supplements, and develops amendments.



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

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

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

- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 – present)*
Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.

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

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

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

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

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



- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Projects I and II (07/2021 – 11/2023)*
Serving as program manager, Susan oversaw this project and provided subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Susan participated in writing and planning assistance for the “State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services” planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Susan’s project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.
- *CCBHC SPA Project (09/2022 – 8/2023)* As program manager for the CCBHC SPA Project, Susan was responsible for oversight of the project team, assisted with project management, tracked the project budget, and monitored any risks and issues.
- *OD Services Project (05/2022 – 11/2023)*
As a business analyst (BA) on the OD project, Susan assisted with client relations, retreat planning and coordination, research, and writing assignments that helped to inform strategic planning documents, in addition to other identified deliverables per the agreed-upon SOW.
- *Provider Enrollment Application (PEA) Project (02/2017 – 11/2017)*
Susan provided project coordination assistance by maintaining all the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV PEA process.
- *ICD-10 Transition Planning and Implementation (10/2015 – 02/2016)*
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.
- **Independent Consultant (08/2010 – 10/2014)**
Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.
- **Columbia Management (09/2012 – 10/2013)**
Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.



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

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

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

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

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

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

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



Julie DuPuis, MPA

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

Overview

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

Experience
BerryDunn (06/2022 – Present)

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

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

- *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.



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.



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)*



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

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

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

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

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



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 on 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 aid 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 aiding in planning and implementation of new 1115 waiver documentation.
 - *Mobile Crisis Services Planning Project (09/2021 – present)*

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



Services.

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

Mercer GHSC (10/2019 – 07/2020)

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

Independent Consultant (10/2019 – 06/2020)

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



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

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

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

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

State of Michigan (12/2007 – 04/2015)

Brody worked as a department specialist to extract and analyze data from diverse sources including the 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.



Jeff Stoddard, CCP®

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

Overview

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

Experience

BerryDunn (12/2019 – present)

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

- **State of West Virginia (WV)**
 - WV Bureau for Medical Services (BMS)**
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 – present)*
Jeff provides technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.
 - *Data Improvement Project (12/2019 – present)*
Jeff provides technical leadership and analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.
 - *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*
Jeff provided technical leadership and business analysis support to the Department



of Health and Human Resources (DHHR) for the implementation of the State's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

West Virginia Department of Human Services (DoHS)

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

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

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

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

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

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

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

- **Data System Development**

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

- **Analytic Enclave Implementation**

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

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

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

Arcadia Solutions (04/2012 – 07/2013)

As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and business intelligence capabilities for a community health network in the State of Washington, building an integrated claims and clinical data



warehouse with a user interface to be used for population health management. The project was delivered on schedule and within budget.

Health Dialog (09/2004 – 04/2012)

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



Jim Strassenburgh

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

Overview

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

Experience

BerryDunn (02/2013 – present)

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

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

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

- *Enterprise Data Services and Data Source Program (01/2020 – present)*

- As a technical subject matter expert (SME), Jim concentrates on data governance for this large initiative and serves as an integration point between the People's Access to Help (PATH) program data services and enterprise data services.

- *People's Access to Help (PATH)/Integrated Eligibility System (IES) Program (10/2019 – present)*

- Jim is a member of the State Program Management Office, serving on the Document Review Team. As a team member, Jim reviews all program artifacts, with a focus on operations, architecture, performance testing, and data governance components for the program.

- **Massachusetts HIX/IES Entities**

- *IV&V Services (05/2014 – 09/2019)*

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



- **Maryland Health Benefit Exchange**

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

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

- **Missouri Department of Social Services**

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

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

MetroSource, Corp. (1995 – 2012)

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

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

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

Xerox (05/2008 – 06/2009)

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

NYFIX, Inc. (01/2000 – 07/2006)

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



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



Marvin “Ed” Crawford

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

Overview

Ed brings demonstrated experience in all aspects of Health Information Technology security to projects, focusing on policy, research, and analysis and interpretation of laws, rules, and regulations. His experience includes project management services in support of both design, development, and implementation (DDI) and operations for the West Virginia (WV) Medicaid Management Information Systems (MMIS) and Eligibility & Enrollment (E&E) projects. Ed works closely with both the client and vendors to help ensure that applicable systems security infrastructure is in place and provides subject matter expertise in the areas of privacy and security as it relates to systems development and maintenance, architecture, and documentation.

Experience
BerryDunn (04/2019 – present)

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (EDS) (07/2021 – present)*
As the systems security lead for the project, Ed provides oversight of privacy and security-related project workstreams. He assists in the development, update, and review processes for security and technical deliverables and helps review and establish documented compliance with system security requirements at the project, Department, and Federal level.
 - *People’s Access to Help (PATH) DDI Project Management (04/2019 – present)*
Ed coordinates numerous reviews for 92 separate deliverables, managing intake of all documents from contract vendor, disseminating to internal reviewers, and compiling comments for posting back to Optum. He also administers accurate documentation and tracking of all deliverables to and from the vendor. He is responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation industry best practice processes and methodologies for consistency and



traceability.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (04/2019 to present)*

Ed maintains an Access database for the MITA project used for gathering and compiling data during the annual State Self-Assessment, helping to ensure that BMS consistently maintains compliance with its federal partners.

West Virginia Bureau for Medical Services (06/2010 – 04/2019)

As the HIPAA Security Officer, Ed provided management and operational support services to the State Medicaid Agency which included, but was not limited to, Information Technology security controls, system performance monitoring, project management, report administration, and stakeholder engagement. Areas of focus included research, analysis and management of comprehensive IT security policies and procedures for the Medicaid Enterprise (MMIS, DW/DSS and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

West Virginia Office of Technology (02/2009 – 06/2010)

Ed served as an IT client technician, providing project management, coordination, reporting and operational support services for new, and existing, IT implementation activities for the WV Executive Domain. He provided senior level technical support services for designated Agencies within the Executive Branch.

West Virginia Office of the Insurance Commissioner (09/2005 – 02/2009)

As primary HIPAA Security Officer, Ed was responsible for the creation, promulgation, implementation, management and reporting of projects, initiatives, policies and procedures related to accessing the Workers Compensation Insurance System (WCIS) and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Workers Compensation Commission (12/1999 – 09/2005)

Ed was the primary information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies and procedures related to the access to WCIS and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Division of Corrections (12/1995 – 12/1999)

As Communications Officer, Ed was also the primary designated Information Security Officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures for IT environment at the Mount Olive Correctional Complex.



Adam Bowman

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

Overview

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

Experience

BerryDunn (10/2019 – present)

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

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

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

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

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

United States Air Force (03/2012 – present)

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



specifications and criteria to present to non-technical audiences. Researches or oversees research of technologies and advises commanders on associated risks and mitigation factors in conjunction with meeting requirements. He currently holds a Top Secret / SSBI / OPM security clearance.

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

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

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

CMS Insurance (10/2011 – 09/2018)

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



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

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

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.



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

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

Overview

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

Experience

BerryDunn (02/2018 – present)

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

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

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

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

- As a SME, Jason supports the engagement in multiple operational areas, including strategic planning, resource management and tracking, budget and scope development, and project management methodology and



standards alignment. He also provides knowledgeable insight and expertise related to Medicaid Information Technology Architecture (MITA) and Medicaid Management Information Systems (MMIS) APD updates, maintenance, and forecasting (multiple iterations).

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

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

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

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

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

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

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

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

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

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

Jason serves as the engagement manager for BerryDunn's team supporting HCS's MES modernization and procurement activities. He collaborates directly with HCS leadership to provide subject matter expertise and assist in visioning, researching, and solicitation development efforts. Additionally, Jason is actively supporting the



transition of services and vendor onboarding. Jason's leadership has been instrumental in the development of an initial modernization strategy, the creation of an MMIS Systems solicitation, and the visioning, research, and development of an MMIS Fiscal Agent solicitation.

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

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

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

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

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



direction, coordination, and completion of assigned strategic projects. He also assisted with business development and RFP responses, developed and implemented project management tools and tracking methods, and managed administrative office and project staff members.

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

- **Ohio Medicaid PBM and Rebate Services (04/2016 – 02/2017)**

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

- **Illinois Medicaid PBM and Rebate Services (03/2014 – 03/2016)**

As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.

- **Iowa Medicaid Enterprise PBM (04/2012 – 10/2013)**

Jason led the reprocurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SMEs in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.

- **Utah CMS certification support (2012)**

Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.

- **Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 – 10/2011)**

Jason served as the Implementation Project Manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set



of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and management, meeting facilitation, risk and issue management, report management and client engagement. This project also included more intensive training of state staff and product education, change request management and issue resolution.

- **Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 – 05/2009)**

As the Project Manager, Jason worked closely with internal business leads and the client to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders and the incumbent vendor. Typical project activities included meeting facilitation, requirement, risk and action item management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client and business SMEs to successfully certify the system.

- **Maine Medicaid Mailroom and BPO (HCFA, UB, ADA) and Medical Prior Authorization**

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

Ingersoll-Rand (03/1998 – 11/2005)

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



Christa Bernacchia

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	23 years
Certifications and Education:	Bachelor of Arts in Mass Communications, Quinnipiac College

Overview

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

Christa's experience includes working for a staff model health maintenance organization (HMO), where she managed all internal credentialing, including primary source verification, privileging, Joint Commission accreditation, special projects, and emergency planning efforts.

Experience
BerryDunn (01/2021 – present)

As the BerryDunn Director of Credentialing Services, Christa is responsible for the overall growth and vision of the credentialing service line, including the NCQA CVO certification and credentialing consulting offerings. Christa works with a dedicated team to build relationships and manage client communications and services, including commercial insurance carrier and governmental payer enrollments, as well as credentialing, privileging, and ongoing/exclusion monitoring needs.

VantagePoint HealthCare Advisors (10/2016 – 12/2020)

As the Director of Credentialing Services, Christa managed a team of credentialing specialists and was responsible for the operational oversight of the Credentialing Department, including the organization's NCQA CVO certification.

HealthyCT, Inc. (03/2016 – 10/2016)

As the Quality Improvement Analyst, Christa supported activities and projects related to credentialing, recredentialing, data analysis, reporting, HEDIS, audits, and member and provider experience. She also conducted analyses to identify gaps in data, systems, and processes,



creating workflows and best practices to help ensure the effective implementation and maintenance of corrective actions. Christa supported initiatives for a thorough quality improvement program that is responsible for external accreditation efforts (NCQA) as well as compliance with federal and state regulations and standards.

Yale Health (03/2005 – 03/2016)

As the administrative coordinator and manager, Christa managed the daily operations, training, and development of Yale Health's clinical receptionist team. She also led and/or participated in special projects, including the Epic clinical system implementation, new building project (functional project manager), new member outreach efforts, emergency preparedness, and other institutional efforts. Christa oversaw the organizational credentialing and privileging process and was a member of the Joint Commission Steering Team, the Epic Steering Team, and various communications and service enhancement committees. Christ holds certificates in Interest-Based Problem Solving and Incident Command System/NIMS.

Publications and Presentations

- *The Big T: Telehealth Midway and Side Shows - Revenue Integrity, Compliance & Credentialing Opportunities, Risks, and Tips for FQHCs*, September 14, 2021
- *Don't Give Up Ship! How Hospitals Can Turn Hidden Privileging, Credentialing and Enrollment Risk into Compliance and Revenue Integrity Treasure*, July 22, 2021
- *Acoustic Design Case Study, Yale University Health Services Center – Healthcare Facilities Symposium*, Chicago, September 2008



Matthew Oatten

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

Overview

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

Experience

BerryDunn (07/2022 – present)

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

WV Department of Human Services (DoHS)

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

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

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

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

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

Matthew serves the project by providing business analysis and project



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

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

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

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

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

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

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



AJ Mong, MEd

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

Overview

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

Experience

BerryDunn (07/2022 – present)

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

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

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



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

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

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

AJ served as an Elementary School Counselor with the School Leadership Team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analysis processes that would lead to measurable system-wide 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 Hershey Park 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.



Sue Prior

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

Overview

Sue is a principal in BerryDunn's Healthcare Group, joining the firm in 2021 as part of the merger with VantagePoint HealthCare Advisors. Sue helps clients address the demands of today's rapidly changing healthcare market, developing effective and proactive strategies designed to improve their business and help them stay competitive. In her more than 25-year career, Sue has served as a director for a nationally recognized chain of nutrition centers and in executive positions across various academic hospital systems, medical practices, and management services organizations. Sue's diverse background and certification in healthcare compliance positions her to effectively assist clients with strategic planning, revenue integrity, and operations optimization.

Experience
BerryDunn (01/2021 – present)

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

VantagePoint HealthCare Advisors (1999 – 01/2021)

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



Yale New Haven Health System (1994 – 1999)

As the manager of Business Services, Sue oversaw business, administrative, and information system functions of the Medical Business Office (MBO). She also established and maintained client and vendor relationships and developed and implemented marketing and sales activities through business evaluation, proposal submission, and contract negotiation. Sue was also tasked with helping to ensure accuracy standards are met for data integrity and staff training; she also presented practice compliance issues in registration and charge entry to physicians' offices to correct and reduce errors.

Publications and Presentations

- 27th Annual HCCA Compliance Institute April 2023 – *Don't Be Surprised! How Ambulatory Care Providers Can Streamline Compliance*
- BerryDunn Insights March 2023– *Effective Provider Onboarding: Improve Care, Reduce Turnover, and Save Money*
- 26th Annual HCCA Compliance Institute March 2022 - *Win, Place, and Show: Making a Trifecta Bet on Revenue Integrity, Risk Management, and Quality in Chronic Care Management*
- Compliance Podcast, January 2022 – *Program effectiveness, resource allocation, and risk assessment*
- New England Society for Healthcare Strategy (NESHS), 2018 New England Society for Healthcare Strategy (NESHS), 2018 - *Unknown Unknowns: How what you don't know about provider credentialing, privileging, and enrollment creates strategic and compliance risks, barriers to care, and claim denials,*
- Care Compliance Association (HCCA) Webinar, 2018 - *The Unknown Unknowns of Credentialing, Privileging and Enrollment, Health*



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)

As an Admitting Clerk, John worked 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 required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



Hailey Holden

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

Overview

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

Experience
BerryDunn (07/2022 to present)

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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



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:	<p>Master of Business Administration, focus on Healthcare Administration, Marshall University</p> <p>Bachelor of Arts in Communication Studies, focus on Organizational Communication, Marshall University</p> <p>Project Management Institute (PMI) Certified Project Management Professional (PMP®) (<i>in progress</i>)</p>

Overview

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

Experience

BerryDunn (05/2022 – present)

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

WV Department of Human Services (DoHS)

- *Partnership Management (12/2023 – present)*
Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the United States Virgin Islands (USVI). Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *People's Access to Help (PATH) Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 – 03/2024)*
Katie provides project coordination assistance to DoHS with planning and helping to manage the PATH MARS-E Security Assessment project. Katie helps with developing and reviewing project deliverables for various project-related activities and tasks.
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-*



*Assessment (SS-A) Maintenance Annual Update Assistance Project
(07/2023 – present)*

Katie assists with MITA 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.

- *PATH DDI Project Management (03/2023 – present)*

Katie provides project coordinator assistance with implementing the PATH system. Katie helps with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.

- *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*

Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DHHR'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

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

Overview

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

Experience

BerryDunn (06/2021 – present)

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

- **State of WV**

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

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

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

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

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

West Virginia Department of Human Services (DoHS)

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

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

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

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

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

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

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



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

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

Highmark WV BCBS (10/2012 – 07/2014)

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

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

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

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

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

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

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



Kourtney Kirk

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

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, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and



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

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

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

TEKSystems (08/2020 – 01/2022)

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

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

- *Business Development Representative and Scheduling Coordinator (08/2019 – 08/2020)*

Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AE's to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

- *Business Development Representative (03/2018 – 11/2018)*

Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and managed client relationships.

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



Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pick-up and delivery of shipments. She communicated proactively customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

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

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



Shandia Benke, ECBA™

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

Overview

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

Experience

BerryDunn (04/2018 – present)

- **State of West Virginia (WV) Department of Human Services (DoHS)**
 - *WV Engagement (WVE) PMO Mountain Health Trust (MHT) Phase II Project (2/2024-present)*
 - *WVE PMO People's Access to Help (PATH) Project (05/2023 – present)*

Shandia provides coordination and analytical support to the MHT and PATH projects through capturing detailed notes, editing and reviewing project documentation, and contributing insightful processes and business analysis. Additionally, Shandia focuses on promoting efficiency through identifying gaps in internal processes and taking opportunities to provide process improvements.

- **Missouri Department of Social Services (DSS)**
 - *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 – present)*
 - *MME PMO Program Integrity (02/2019 – 01/2021)*
 - *MME PMO Business Intelligence Solution – Data Warehouse Enterprise*



(04/2018 – 02/2019)

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 to 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 to 2015)*
As a dean, Shandia managed the character education program and provided support to students, families, and faculty.

Hentges Tree Service (2013 – 2015)



As an office administrator, Shandia supported the mechanical fleet at Hentges by utilizing Dossier interface software. In this position, Shandia also created new internal processes and procedures to increase office efficiency.

Wells Fargo Home Mortgage (2012)

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



Alycia Minshall, MA

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

Overview

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

Experience

BerryDunn (8/2022 – present)

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

Alycia Minshall Editing Services (3/2014 – present)

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

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

- *Senior Editor (6/2020 – 8/2021)*

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



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

- *Editor (4/2017 – 6/2020)*

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

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

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

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

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

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

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

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

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

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

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

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



Caitlin Cabral

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

Overview

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

Experience
BerryDunn (09/2021 – present)

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

QualityMetric (08/2020 – 09/2021)

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

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

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

True Colors, Inc. (01/2019 – 05/2019)

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



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

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

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



Carole Ann Guay

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

Overview

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

Experience
BerryDunn (10/2014 – present)

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

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



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

Webber Energy Fuels (2004 – 2014)

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



Emily Hendrickson

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

Overview

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

Experience
BerryDunn (07/2017 – present)

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

Christianbook (06/2021 – present)

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

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

As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant content for tone, clarity, and structure and performed information-gathering to revamp text and



fact-check quoted material.

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

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

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

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

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

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

Civil Consultants (09/1999 – 07/2014)

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

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

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



Janine DiLorenzo

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

Overview

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

Experience
BerryDunn (01/2022 – present)

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

Breakwater School (08/2019 – 08/2021)

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

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

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



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

Stonehill College (08/2010 – 05/2011)

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



Jonathan “Jon” Williams

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

Overview

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

Experience
BerryDunn (02/2019 – present)

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

Freelance Proofreader and Copyeditor (11/2010 – present)

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

Midwest Tape (11/2004 – present)

Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog (mwtnewsandviews.com), social media, and other projects. He serves on a committee that established the company’s brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

Mitchell Equipment Corporation (02/2002 – 11/2004)

First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly and met with current and potential vendors. He scheduled service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

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



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



Jordan Ramsey, MA, LSSGB

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

Overview

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

Experience
BerryDunn (07/2019 – present)

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

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

Portland Adult Education (2019)



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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

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

The Southern Illinoisan (2014 – 2015)

As copyeditor, proofreader, and sports clerk, Jordan wrote and edited articles and prepared them for publications. In addition, he wrote headlines and subheads for articles and reviewed content to help ensure it was published error-free.

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

- **Hardin County, IL**

Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

- **NOVA Group of Japan**

Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



Megan Hamilton, MA

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

Overview

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

Experience
BerryDunn (12/2022 – present)

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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

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

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



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

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



KD Dobyne

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

Overview

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

Experience

BerryDunn (09/2023 – present)

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

Qualtek Wireless (08/2022 – 09/2023)

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

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

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

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

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

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

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

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

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



Term/ Acronym	Definition
IT	Information Technology
IV&V	Independent Verification & Validation
JAD	Joint Application Development
JRP	Joint Requirements Planning
MCMP	Medicaid Learning Center Certified Medicaid Professional
MCO	Managed Care Organization
MECT	Medicaid Enterprise Certification Toolkit
MCES	Medicaid & Children's Health Insurance Program Enterprise System
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MLC	Medicaid Learning Center
MMIS	Medicaid Management Information System
MSP	Modernization Strategy and Procurement
NCCI	National Correct Coding Initiative
NCPDP	National Council for Prescription Drug Programs
OBP	Outcomes-Based Planning
OCM	Organizational Change Management
OD	Organization Development
PATH	People's Access to Help
PBM	Pharmacy Benefit Manager
PEA	Provider Enrollment Application
PERM	Payment Error Rate Measurement
PHE	Public Health Emergency
PMO	Project Management Office
PMP®	Project Management Professional®
POS	Point of Sale
QA	Quality Assurance
RFI	Request for Information



Term/ Acronym	Definition
RFP	Request for Proposal
RFQ	Request for Quotation
SDLC	System Development Life Cycle
SIT	System Integration Testing
SNAP	Supplemental Nutrition Assistance Program
SOW	Scope of Work
SS-A	State Self-Assessment
State	West Virginia
SME	Subject Matter Expert
TANF	Temporary Assistance for Needy Families
UAT	User Acceptance Training
USVI	United States Virgin Islands
WVCHIP	West Virginia Children's Health Insurance Program
WVU	West Virginia University

Keyword Search

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

Simple Search

Search Editor

☐ Any Words ⁱ

☐ All Words ⁱ

☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

×

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Location

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information								
Business Purpose	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Technical Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)			Capital Stock				
Charter County	Kanawha			Control Number	0			
Charter State	ME			Excess Acres	X Close			
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**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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DBA

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

BERRY, DUNN, MCNEIL & PARKER,
PLLC

TRADENAME

11/5/2019

DBA Name

Description

Effective Date

Termination Date

Annual Reports

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