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 BMS2400000052 1	**Procurement Folder:**	1439387
Document Name:	Systems Development Lifecycle (SDLC) Coordination Project	**Reason for Modification:**	
Document Description:	Systems Development Lifecycle (SDLC) Coordination Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	**Master Agreement Number:**	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT
Vendor Customer Code: 000000100150	**Requestor Name:** Lakendra R Burdette
BERRY DUNN MCNEIL & PARKER LLC	**Requestor Phone:** 304-352-4319
2211 CONGRESS ST	**Requestor Email:** lakendra.burdette@wv.gov
PORTLAND ME 04102	
US	
Vendor Contact Phone: 6813138905 **Extension:**	
Discount Details:	

Discount Details:

	Discount Allowed	Discount Percentage	Discount Days
#1	No	0.0000	0
#2	No		
#3	No		
#4	No		

24
FILE LOCATION

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

Total Order Amount:	$689,935.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION
DATE:
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE:
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Systems Development Lifecycle (SDLC) Coordination Project

Dates of Service: 06/17/2024 - 06/14/2025

Total: $689,935.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$6,450.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-17	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

30 hours @ $215 = $6,450.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$5,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-17	2025-06-14				

Commodity Line Description: Engagement Manager: Optional Renewal Year One

Extended Description:
Engagement Manager: Optional Year One

Hourly Rate: $270.00

20 hours @ $270 = $5,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$13,325.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-17	2025-06-14				

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

Extended Description:
Lead MMIS Project Manager: Optional Renewal Year One

Hourly Rate: $205.00

65 hours @ $205 = $13,325.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		$0.0000	$581,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-17	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

3,230 hours @ $180 = $581,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		$0.0000	$83,360.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-06-17	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

1,042 hours @ $80 = $83,360.00

b, BerryDunn

May 20, 2024

To Whom It May Concern:
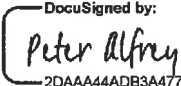
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DOHS) Bureau for Medical Services (BMS) by providing support for the Systems Development Lifecycle (SDLC) Coordination Project under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 17, 2024.

Assuming a start date of June 17, 2024, the work would then conclude on June 14, 2025.
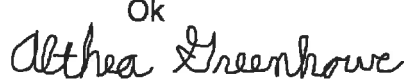
Please let me know if you have any questions or if you would like to discuss the content in this SOW.

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

Best Regards,

Ok

Althea Greenhowe

DocuSigned by:

Peter Alfrey

2DAAA44ADB3A477...

Peter Alfrey
Principal
207-541-2242

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West Virginia Department of Human Services, Bureau for Medical Services

Systems Development Lifecycle (SDLC) Coordination Project

Staffing Plan and Scope of Work

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

WEST VIRGINIA DEPARTMENT OF
HUMAN SERVICES

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 20, 2024

Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) Systems Development Lifecycle (SDLC) Coordination Project

The State of West Virginia (State) DoHS requested BerryDunn continue project management (PM) support and SDLC coordination assistance following the closeout of Phase IV of the Data Improvement Project (DIP). This work will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and West Virginia DoHS.

1.0   Introduction

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Staffing Plan and SOW for the SDLC Coordination Project. 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 SDLC Coordination Project.

BMS has requested that BerryDunn continue providing SDLC coordination assistance following the closeout of Phase IV of the DIP. Phase IV of the DIP began on May 22, 2023, and will end on June 14, 2024. SDLC work in DIP Phase IV included delivery of the SDLC Coordination Plan, built upon the analysis of and findings related to current BMS change management and SDLC policies, processes, and procedures. This deliverable was collaboratively drafted between the State and BerryDunn, with consideration of current and future vendor process expectations. The SDLC Coordination Project will focus on aligning SDLC activities across all BMS system vendors and data suppliers, including standardizing the process of making changes to the State's Medicaid and Children's Health Insurance Program (CHIP) Enterprise systems and developing a consistent release cycle.

The program goal of the SDLC Coordination Project is to promote improved efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes. This SOW will support the following activities:

Continued PM support services

- Continued Transformed Medicaid Statistical Information System (T-MSIS) support

- Establishment of an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes

- Establishment of a Change Advisory Board (CAB), with recommendations to potentially establish a Change Control Board (CCB) in the future

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- Implementation of a centralized change management/SDLC tracking system and operationalizing it with BMS.

The SDLC Coordination Project will also help the State meet several of its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- MITA Roadmap Transformation Goals:

- General (Gen) 1.0 – Improve BMS effectiveness and efficiency

- Gen 2.0 – Minimize risk and maximize value from contracted services and products

- Gen 3.2 – Improve data access, analysis, and reporting to support decision-making

- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal and State laws

- Gen 5.0 – Help ensure program quality

- Gen 3.0 – GOAL – Leverage technology to enhance performance and decision-making

- Gen 4.0 – GOAL – Assess, implement, and monitor compliance with all relevant federal laws and regulations (e.g., Patient Protection and Affordable Care Act [PPACA], Summary of Material Modifications [SMM], Health Information Portability and Accountability Act [HIPAA])

- Operations Management (OM)1.0 – Improve operational efficiency and reduce costs in the healthcare system

- Care Management (CM) 1.0 – Improve healthcare outcomes for members

1.2   Assumptions

Estimates for this SOW are based on the following assumptions:

- The cost of services and timeline in this SOW assume services are scoped to occur across 13 months. The level of effort defined within this SOW is a point-in-time estimate that might require updates based on sponsor and collaborator availability and resources. This work will begin upon approval of this SOW and a mutually agreed-upon date.

- BerryDunn assumes the scope of the SDLC Coordination Project is to assist BMS in improving the oversight, efficiency, and communication/coordination processes related to change management and SDLC for the State's Medicaid Enterprise Systems (MES) and associated enterprise decision support resources.

- BerryDunn assumes the project will focus on overarching enterprise SDLC and change management and is not intended to replace existing State, Managed Care Organization (MCO), or vendor existing processes for handling emergent SDLC and change

management needs (e.g., hotfixes, patches, etc.) unless at the discretion and direction of the State.

- The State leadership project sponsor will be Brandon Lewis.

- The State project lead(s), Doug Sorvig, Andrew Pack, and Matt Brannon will provide timely decision-making and responses to information requests from the BerryDunn project team.

- Deliverables will be provided in an agreed-upon format.

- All project documents—including meeting outcomes, action items, issues, risks, and decisions— will be on the Jira® and/or BMS Google Drive project sites, as well as the BerryDunn SharePoint project site. Documents will be shared with and communicated to the BMS project sponsor and project leads during the project's duration.

- State staff and other project stakeholders from bureaus, agencies, and vendor partnerships will make themselves available for pertinent SDLC coordination activities. Lack of availability or participation could cause impacts to the project schedule and/or scope.

- The BerryDunn leadership team will consist of Nicole Becnel as the Engagement Manager (EM), Eduardo Daranyi as the Lead Project Manager (LPM), Meghann Slaven and the Program Manager, and Cate Poling as the Project Manager.

- This SOW assumes, with State approval, BerryDunn will be granted timely and adequate access, in accordance with all applicable State and Federal privacy and security standards and guidelines, to necessary State Medicaid systems and documentation and other relevant DoHS and vendor program systems and documentation required to complete the objectives of this SOW.

- BerryDunn will explore supporting the State in strengthening partnerships with states and other territories, such as the United States Virgin Islands (USVI) and Puerto Rico (PR) and leveraging existing tools and procedures.

1.3   Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) 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 $689,935. 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.

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2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, artifacts, 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/Artifact Service Approach, Responsibility, and Hours Estimate

Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
1.0	**Engagement Oversight** *Service Approach* 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 timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables. *Deliverable(s)* • D01: Commissioner Briefing *Completion Criteria* All parties will deem Engagement Management complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.	Nicole Becnel Eduardo Daranyi Emily McCoy Peter Alfrey Dawn Webb Meghann Slaven	200
2.0	**Project Management Support** *Service Approach* Upon project initiation, BerryDunn will conduct a kickoff meeting with key stakeholders to validate business process owners, identify State goals and objectives, and document agreed-upon expectations for the management of the project. BerryDunn's Project Management Support services align with Project Management Institute® (PMI®) standards. Additional Project Management Support tasks will include: • Facilitating meetings, preparing meeting materials, and taking notes for recurring and ad hoc BerryDunn- and State-owned	Emily McCoy Peter Alfrey Meghann Slaven Jeff Stoddard Cate Poling Rick Hayward Krista Clay Megan Blount Jordan Ramsey Alycia Minshall Caitlin Cabral Carole Ann Guay	953

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Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	meetings • Preparing monthly project status updates, risks, issues, and briefings for the State leadership team • Managing project logs (action item, decision, issue, and risk tracking) • Storing project documentation in agreed-upon Jira®, State Google Drive, and SharePoint locations • Assessing support from additional resources and subject matter experts (SMEs) for project needs • Providing continued State T-MSIS support—biweekly meeting facilitation with BMS and Gainwell; monthly meeting facilitation with BMS, Gainwell, and CMS; Implementation Advance Planning Document Update (IAPD-U) updates as needed; T-MSIS CMS dashboard slide review; SDLC/change management support *Deliverable(s)* • D02: Monthly Status Report *Artifact(s)* • A01: Project Schedule • A02: Action Item and Decision Log • A03: Risks and Issues Log • A04: Meeting Materials and Notes *Completion Criteria* All parties will deem Project Management Support complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.	Emily Hendrickson Janine DiLorenzo Jonathan "Jon" Williams Megan Hamilton KD Dobyne Kourtney Kirk Hailey Holden Shandia Benke Katie McDonald	
3.0	**Analysis and Assessment Support** *Service Approach* BerryDunn will provide project management services to support the analysis and assessment of current State, MCO, and vendor change management and SDLC processes across the enterprise. BerryDunn will perform the following tasks to execute activities under the SDLC Coordination Project to help provide	Meghann Slaven Jeff Stoddard Cate Poling Peter Alfrey Rick Hayward Chris Fanikos Alex Flower	1,053

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Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	process, policy, and procedure recommendations: • Participate in State, MCO, and vendor change management and SDLC meetings and provide recommendations for meeting consolidation as applicable • Form a CAB and select a BerryDunn Change Management Coordinator and a State Change Management Chair • Explore opportunities and recommendations related to broadening the State CCB group and processes • Facilitate meetings, prepare meeting materials, and provide notetaking for BerryDunn, State-owned, and vendor-owned meetings as requested • Review applicable sponsor and collaborator process, policy, and procedure documentation and/or system architecture materials • Collaborate with the State, MCOs, and vendors to provide process, policy, and procedure recommendations that result in enhanced change management and transparency • Assist the State with implementing change management standards related to change management communication, documentation expectations and distribution, and scheduling BerryDunn will also facilitate weekly meetings with State project sponsor(s) and project leads to discuss the project status across each project area. BerryDunn will use this time to notify the State of project risks, issues, and/or items that might require its attention. The team will also use this time to plan risk mitigation and issue resolution strategies and responses. *Leverage and Reuse* BerryDunn will work with the State to identify and include key sponsors and collaborators to form applicable groups and subgroups, leveraging existing State, MCO, and vendor groups and subgroups whenever appropriate and practical.	Danielle Joslyn Jim Strasenburgh Krista Clay Megan Blount Kourtney Kirk Jordan Ramsey Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Megan Hamilton KD Dobyne	

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Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	BerryDunn will explore strengthening partnerships with states and other territories (such as the USVI and PR) and leveraging tools and procedures. *Deliverable(s)* • D03: Standardized SDLC Documentation ○ Communication Plan Template ○ Release Notes Template ○ Standard Rosters and Distribution Lists *Artifact(s)* • A05: DIP SDLC Coordination Plan • A06: SDLC Process Implementation Document *Completion Criteria* All parties will deem Analysis and Assessment Support complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.		
4.0	**Deliverable Management and Support** *Service Approach* BerryDunn will utilize its standardized approach to monitor and provide management oversight for the quality of project deliverables, artifacts, and other submitted work products. Our approach will consist of the following elements: • Facilitating, tracking, and managing Project Management Office (PMO)-owned deliverables. Project deliverables will be stored in an agreed-upon location. • Developing, reviewing, and finalizing deliverable acceptance criteria with the State. • Creating and obtaining approval on each PMO-owned project deliverable. Please refer to Appendix B for more information. • Reviewing of deliverables and contract material for quality, comprehensiveness, and alignment with project requirements as applicable. In support of this objective, BerryDunn will work with the State, MCOs, and vendors as needed to help ensure all SDLC and change management deliverables	Meghann Slaven Jeff Stoddard Cate Poling Peter Alfrey Rick Hayward Chris Fanikos Alex Flower Krista Clay Megan Blount Kourtney Kirk Jordan Ramsey Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Megan Hamilton KD Dobyne	957

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Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	align with processes and procedures validated by the State. BerryDunn will also work with the State to help ensure project deliverables align with the State-approved acceptance criteria. *Completion Criteria* All parties will deem Deliverable Management and Support complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.		
5.0	**SDLC Business Process Implementation Support** *Service Approach* BerryDunn will provide overall project management services to support the development, implementation of, operationalizing of, and training for State-approved SDLC and change management tools, policies, procedures, and processes. This includes assisting the State with development of the approach, processes, strategies, and methodologies used to manage the project, while helping to eliminate and/or avoid duplicative processes. BerryDunn will work with the State, MCO, and vendor partners to identify training and associated documentation needed to assist the State in the implementation efforts required to complete the project. BerryDunn will also provide support services for scheduling, facilitating, and managing any virtual and/or on-site meetings as needed. BerryDunn's key business process implementation support activities will include: • Assisting the State with evaluating change management tools currently in use • Assisting the State in evaluating opportunities to leverage existing tools or incorporate new tools into change management processes • Assisting the State with obtaining and reviewing existing MCO, vendor, and State SDLC and change management contracts, deliverables, and policy/procedure documentation as necessary • Providing the State assistance with tool,	Meghann Slaven Jeff Stoddard Cate Poling Peter Alfrey Rick Hayward Danielle Joslyn Jim Strasenburgh Chris Fanikos Alex Flower Krista Clay Kourtney Kirk Megan Blount	988

Ref #	Deliverable/Artifact Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	policy, process, and procedure training support for the CAB, Change Management Coordinator, Change Management Chair, and other individual sponsors and collaborators as necessary BerryDunn will provide support services to the State by leveraging State, MCO, and vendor existing tools, functionalities, and processes when applicable to help prevent unnecessary duplication. *Deliverable(s)* • D04: Jira® SDLC Workflow Development and Implementation *Completion Criteria* All parties will deem SDLC Business Process Implementation Support complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.		
6.0	**Project Closeout** *Service Approach* BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to DoHS/BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. *Deliverable(s)* • D05: Project Closeout Summary *Completion Criteria* All parties will deem Project Closeout complete upon successful completion of the project and acceptance of D05: Project Closeout Summary by the project sponsor or their designee.	Emily McCoy Peter Alfrey Meghann Slaven Dawn Webb Jeff Stoddard Cate Poling Kourtney Kirk Krista Clay Megan Blount Hailey Holden Katie McDonald Shandia Benke	236
		Total Hours	4,387
	Total Not-To-Exceed Cost Estimate		**$689,935**

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3.0 Project Resources and Hours

Table 2, below, displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 1 in CMA HHR21*03 BMS.

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

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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	$270	Nicole Becnel	20	$5,400
8	LPM	$215	Eduardo Daranyi	30	$6,450
10	LMPM	$205	Emily McCoy	65	$13,325
11	GPM	$180	Dawn Webb	65	$11,700
11	GPM	$180	Peter Alfrey	110	$19,800
11	GPM	$180	Meghann Slaven	117	$21,060
11	GPM	$180	Cate Poling	884	$159,120
11	GPM	$180	Jeff Stoddard	299	$53,820
11	GPM	$180	Rick Hayward	910	$163,800
11	GPM	$180	Danielle Joslyn	195	$35,100
11	GPM	$180	Jim Strasenburgh	195	$35,100
11	GPM	$180	Chris Fanikos	130	$23,400
11	GPM	$180	Alex Flower	130	$23,400
11	GPM	$180	Kourtney Kirk	195	$35,100
12	SS	$80	Krista Clay	429	$34,320
12	SS	$80	Megan Blount	169	$13,520
12	SS	$80	Hailey Holden	65	$5,200
12	SS	$80	Katie McDonald	65	$5,200
12	SS	$80	Shandia Benke	26	$2,080
12	SS	$80	Jordan Ramsey	32	$2,560
12	SS	$80	Alycia Minshall	32	$2,560
12	SS	$80	Caitlin Cabral	32	$2,560
12	SS	$80	Carole Ann Guay	32	$2,560

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	$80	Emily Hendrickson	32	$2,560
12	SS	$80	Janine DiLorenzo	32	$2,560
12	SS	$80	Jonathan "Jon" Williams	32	$2,560
12	SS	$80	Megan Hamilton	32	$2,560
12	SS	$80	KD Dobyne	32	$2,560
			Totals	**4,387**	**$689,935**

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4.0   Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	1	4	5	249	85	344	$53,775
Month 2	1	2	5	249	85	342	$53,345
Month 3	1	2	5	249	78	335	$52,785
Month 4	2	2	5	248	76	333	$52,715
Month 5	2	2	5	248	76	333	$52,715
Month 6	2	2	5	248	76	333	$52,715
Month 7	2	2	5	248	76	333	$52,715
Month 8	2	2	5	248	76	333	$52,715
Month 9	2	2	5	248	76	333	$52,715
Month 10	2	2	5	248	83	340	$53,275
Month 11	1	2	5	249	85	342	$53,345
Month 12	1	2	5	249	85	342	$53,345
Month 13	1	4	5	249	85	344	$53,775
Total	**20**	**30**	**65**	**3,230**	**1,042**	**4,387**	**$689,935**

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5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight	█	█	█	█	█	█	█	█	█	█	█	█	█
2.0 Project Management Support	█	█	█	█	█	█	█	█	█	█	█	█	█
3.0 Analysis and Assessment Support	█	█	█	█	█	█							
4.0 Deliverable Management and Support	█	█	█	█	█	█	█	█	█	█	█	█	█
5.0 SDLC Business Process Implementation 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

5/20/2024

_____   _____

Signature   **Date**

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

[signature]

5/29/24

_____   _____

Signature   Date

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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 (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)

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- *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)*

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- 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)

o *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.

o *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.

o *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.

o *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.

o *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.

o *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.

o *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

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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.

o *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.

o *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.

o *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.

o *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

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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.

- o *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.

- o *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.

- o *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.

- o *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**
  - o *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 01/2018)*
    As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing, and Certification project activities.

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

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

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

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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)*

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- *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.

o *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.

o *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.

o *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

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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)

o *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

o *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)**

o *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**

o *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.

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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.

- o *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.

- o *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)**

  - o *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.

  - o *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**

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

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

West Virginia Department of Health and Human Resources (DHHR), Office of Management Information Services (OMIS) (11/2013 – 06/2016)

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

- Interpreting regulatory policy to determine 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.0, 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 to 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

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- **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.

 BerryDunn

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

Overview

Dawn is a manager in BerryDunn's Medicaid Practice Group, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 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)

  o 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)*

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b BerryDunn

- o *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)*

- o *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.

- o *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.

- o *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

BerryDunn

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.

o *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.

o *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)**

  o *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)**

  o *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)**

  o *Medicaid Organizational and Business Process Redesign (11/2021 – 06/2022)*
  Dawn supported the MDQ in PERM corrective action planning and response.

- **State of Alaska, Division of Legislative Audit (DLA)**

  o *National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)*
  Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

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Valley Health Systems, Inc. (12/2009 – 07/2017)

Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 – 11/2009)

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

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

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

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

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

Garrnet 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.

b) BerryDunn

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)

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

b BerryDunn

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.

b) **BerryDunn**

Meghann Slaven

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

Overview

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

Experience

BerryDunn (10/2017 – present)

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

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

  WV Department of Human Services (DoHS)

  o *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 – present)*
    As a project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, proposal evaluation processes, and solution implementation activities. Meghann is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Additionally, Meghann assisted the project team in developing a Data Governance Roadmap.

  WV BMS

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

b BerryDunn

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

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

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

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

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

o *Enterprise Program Management Office (EPMO) Project (07/2019 – present)*
As a business analyst, Meghann assists WV in developing and updating its annual HIT and HIE Advance Planning Document (APD), helping the client gain over $9 million in federal funding for HIT activities and initiatives.

o *Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 – 09/2019)*
Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to WV to assist with the integration of data sources, systems, and databases within BMS. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of key project deliverables. Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed MS Visio process flows to document client data sharing practices.

o *Gap Analysis and Project Management Services (10/2017 – 06/2018)*

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

- **Puerto Rico Medicaid Program (PRMP)**
  - *Puerto Rico Medicaid Management Information System (PRMMIS) Project (11/2020 – 12/2020)*

    As a subject matter expert (SME), Meghann provided guidance and assistance to the project management team to update PRMP's MMIS APD and corresponding federal funding documentation.

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

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

College Summit (04/2011 – 07/2014)

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

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

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

- **Assistant Director of Admissions (08/2008 – 03/2011)**
  Meghann assisted the Admissions Director in development of enrollment plan, developed geographical recruitment plan for admissions representatives, and trained and managed admissions representatives.

- **Admissions Representative (10/2006 – 08/2008)**
  Meghann was responsible for recruitment in specified territory. She served as a university representative at recruitment events, as well as evaluated applicants, facilitated the admissions process, counseled students and families on financial aid, and assisted in implementing enrollment activities.

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

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

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

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

b) BerryDunn

Cate Poling

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

Overview

Cate is an experienced researcher and writer with extensive knowledge of documentation and communication needs related to Medicaid and Managed Care Organization (MCO) billing and coding, quality measures tracking, prior authorizations, step therapies and claims documentation, change management, and system requirements. Her attention to detail has allowed her to be an invaluable resource for assisting with the drafting and interpretation of deliverables, Requests for Proposals (RFPs), meeting agendas and notes, and other critical project documentation. She presents a well-developed understanding of project and system requirements, particularly as relates to Medicaid Enterprise Systems privacy and security architecture and established security frameworks, such as the National Institutes for Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Standards 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.

b BerryDunn

- **State of WV**

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

  o *Data Improvement Project Phase IV (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.

  o *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.

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

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

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

  o *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.

o   *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 times. Cate provided scheduling support and patient flow management; helped ensure all patients have updated, accurate HIPAA compliant registration forms on file and that all EMR systems reflect correct patient information. She assisted with administrative, clerical, patient service, and operational support duties daily.

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

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

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

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

Highmark WV BCBS (10/2012 – 07/2014)

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

This position included heavy documentation/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.

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:	Bachelor of Science, 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)

  o *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.

  o *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.

- o *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)

- o *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)**

  - o *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.

b **BerryDunn**

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 IV (12/2023 – present)*

    Rick lends his expertise to the DIP Phase IV 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.

Danielle Joslyn, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Bachelor of Arts in Mathematics, University of Southern Maine Project Management Institute® (PMI®) Project Management Professional (PMP®)

Overview

Danielle is an experienced healthcare data analyst and project manager with excellent data analysis and evaluation skills. She is highly skilled with the management of patient claim information, building data warehouses, and performing data analysis in Statistical Analysis Software (SAS) and Microsoft SQL based environments and has the proven ability to implement and manage multiple projects, while maintaining high quality standards and providing value-added service to the client. She has shown leadership experience in team-based environments and the ability to work independently to develop new processes and strategies to meet client needs. She has experience across various sectors of the insurance industry including commercial health plans, Medicare Advantage plans and Medicaid Managed Care Organizations.

Experience

BerryDunn (11/2021 – present)

Danielle is a senior consultant with BerryDunn's Health Analytics practice group.

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

  WV Bureau for Medical Services (BMS)

  o *Data Improvement Project (DIP) (11/2021 – present)*

  Danielle provides analytic support for DIP and has built the data reconciliation process that will assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

  WV Department of Human Services (DoHS)

  o *Child Welfare Initiatives Project Management Services (07/2022 – present)*

  Danielle participates in the implementation of the Quality Assurance/Performance Improvement (QAPI) data store to support the Child Welfare Initiatives. She coordinates the requirement gathering and business analyses needed to build a data reporting system and

dashboard to enable the State to reach critical milestones in the agreement.

- **Arizona Healthcare Cost Containment System (AHCCCS)**
  - ○ *Forensic Accounting and Auditing (04/2023 – present)*
    Danielle leads the claim data analysis and creates reports to support the claims analyst in review of provider reimbursement and billing practices in its Medicaid program.
- **Colorado Office of State Auditor (OSA)**
  - ○ *Recovery Audit Contract (RAC) Examination (08/2023 to present)*
    Danielle provides analytic support for the Colorado OSA Recovery Audit Contract project. She participates in the business analysis and requirement gathering to support claims analysis.

Cotiviti (10/2016 – 11/2021)
Danielle worked as a Senior Implementation Manager and Product Manager to coordinate and manage projects for new clients and existing client expansions, including maintaining project timeline, gathering project requirements, developing project plans and milestones, performing data analysis on incoming client data and performing post-payment medical claim audits. She participated in and managed projects for a wide range of health plans including commercial, Medicare Advantage and Medicaid Managed Care Organizations. As part of new client implementations, Danielle participated in payment integrity claim audits for multiple lines of business including, commercial plans, Medicare Advantage plans, and State Medicaid Agencies including New York, Texas, Illinois and New Mexico. The medical audits included review of the following; fee schedule rate adherence review, state-specific policy review, duplicate claim submissions, processing errors, coding and billing standards, and coordination of benefits. For fee schedule rate adherence review, Danielle would perform analysis of claim payments against the contracted rates to confirm claims were paid appropriately and follow the payment schedule. If any issues were identified, she would work with the health plan or MCO to rectify the issues. For state-specific policy review, Danielle would review and interpret a state policy and then analyze claims data to ensure claims were paid and processed per policy requirements. If any discrepancies were identified, she would work with the State subject matter expert, the health plan, or the MCO to confirm that her interpretation of the policy is correct and review the claims that were not in compliance with the policy.

For processing errors and coding / billing standards, Danielle would utilize data analytics to identify claims that appear to be processed incorrectly (incorrect units, incorrect length of stay, incorrect provider identifier used, etc.) and/or had improper coding / billing codes (Outpatient claims that had incorrect revenue code / CPT code combinations causing higher payment, assistant surgeon / co surgeon claims with incorrect modifiers / payment, etc.) Any claims that were identified as potential outliers

BerryDunn

would have a thorough audit performed to confirm if issues are present and understand the scope of the issue. She developed queries to analyze client data to help ensure the data met product needs, maintained all Jira® features/stories, and coordinated priority with the Retrospective Business. She participated in all program increment planning activities in an agile team environment, coordinated internal resources for weekly checkpoints to help ensure timely completion of project tasks, and developed standardized data analysis tools for the implementation team to perform data analysis and validation. Danielle also identified opportunities to streamline the implementation process and build standard client toolset, mentored Implementation Analysts on their assigned projects, and liaised for the implementation team with Research & Development, Operations, Data Management, Go-to-Market, and Product.

RxAnte (09/2015 – 09/2016)
Danielle worked as a Senior Software Developer to design and develop reusable SAS and SQL code to standardize and analyze clinical information. She supported the Web Services team on development of front-end portal used by healthcare entities to achieve medication adherence, completed software development tasks, including analysis, design, implementation, documentation, and validation, and collaborated with business partners to define business requirements and specifications. Danielle provided information and support for ad hoc analytic projects for internal customers. She also performed data extractions from multiple claims data warehouse to meet project requirements.

Cotiviti/Connolly/iHealth Technologies (01/2012 – 09/2015)
Danielle worked in many roles including Associate Business Systems Analyst, Business Systems Analyst, Auditor, and eventually Senior Auditor to identify claim outliers and overpayments utilizing a variety of Cotiviti tools including trend analysis and outpatient and inpatient pricing. She developed new and existing audit concepts, gained client acceptance, trained all audit levels to execute audit projects and performed quality review of claim submissions. Danielle was responsible for reviewing eligible claims to help ensure they were selected as intended for the specific concept and worked with assigned Data Analysts to enhance or create reports to aid in overpayment identification. She also served as subject matter expert on internal tools and systems, mentored junior associates on Cotiviti tools and best practices, and provided day-to-day support to audit team members on query writing and concept development. She utilized understanding of SQL programming and data structure to identify and implement improvement opportunities in current processes and concepts. Danielle collaborated with business partners to understand how medical claim information should be reported and displayed in Access for day-to-day audit use. She participated in Design Sessions and Code Reviews, built, and supported custom software solutions and analytics tools using Microsoft SQL Server, Access, and Excel while providing team and cross-departmental training(s) on new Cotiviti tools or processes.

Health Dialog (02/2007 – 01/2012)

Danielle worked as a Senior Implementation Team Leader, Senior SAS Programmer Analyst, and SAS Programmer Analyst to develop reusable SAS software to in-take, standardize, quality control, and analyze clinical information such as facility, professional, pharmacy, provider, and health survey insurance data. She advanced, documented, and communicated concepts, utilities, processes, standards, and procedures, while providing and implementing strategic ideas for improvement. Danielle worked alongside management to delegate tasks to team members, provided day-to-day support for programmers, and completed software development tasks, including analysis, design, implementation, documentation, and validation. She facilitated code reviews for code development, standardization, efficiency, and accuracy. Danielle was an active contributor to the hiring, coaching, goal setting and performance reviews of new employees, while working with existing team members to mature their software development skills, and business intelligence.

b, BerryDunn

Jim Strasenburgh

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)

  o *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.

  o *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**

  o *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**

- - o *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**
  - o *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.

Chris Fanikos, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Master of Public Health in Public Health Policy, Yale University
	Bachelor of Arts in History and Middle Eastern & Islamic Studies, New York University

Overview

Chris is an accomplished public health professional with experience in corporate, healthcare, and educational organizations. He has strong skills in solutions architecting, research and data analysis, and project management and program development. He has worked with multiple state Medicaid and social services agencies in designing, developing, and implementing solutions for data collection and analysis to support reporting and research related to Medicaid operations, health policy, and behavioral health.

Experience

BerryDunn (11/2021 – present)

Chris is a senior consultant in the BerryDunn Health Analytics Practice Group (HAPG) Data Management & Strategy (DMS) team, where he helps clients by designing and implementing data models, ETL processes, and data warehouse design to support analytic and reporting requirements. Chris provides a wide range of data-related support, including profiling and quality validation testing, compilation, aggregation, and analytics, as well as data governance and master data management. Chris's work includes various analytic projects with the West Virginia Bureau for Medical Services (BMS), enterprise data warehouse development with Puerto Rico's Programa Medicaid de Puerto Rico (PRMP), and Medicaid Enterprise Systems (MES) operations reporting with the New Jersey Department of Human Services. Chris also supports team members by providing guidance on statistical modeling and advanced data visualization efforts. Chris is the lead Tableau developer for BerryDunn's internal reporting efforts and is responsible for creating and maintaining the reporting tools used by firm leadership.

University of Connecticut, Analytics & Information Management Solutions (AIMS) (01/2021 – 11/2021)

Chris worked as a Solutions Analyst to develop data pipelines using Microsoft Azure services (Blob storage containers, Azure Data Factory, Azure Databricks) and NextGen (Mirth) Connect for ingesting and parsing clinical data to aid the Connecticut Department of Social Services (DSS) in analyzing the impact of COVID-19 and State telehealth policies on utilization and clinical outcomes among Medicaid beneficiaries; ingested, parsed, cleaned, and profiled ~2.1

million Consolidated Clinical Document Architecture (C-CDA) files from Connecticut FQHCs. He designed and implemented analytic data models using ingested clinical data; developed interactive, dynamic Tableau dashboards using these models to meet stakeholder-defined analytic requirements, including time trend and geospatial analyses.

University of Connecticut, AIMS (08/2019 – 01/2021)

Chris worked as a Health Policy & Business Analyst to query extracts of the Connecticut All Payer Claims Database, including Medicaid claims, using Python and SQL to develop analytic data views. He developed dynamic, interactive dashboards in Tableau using these views. Chris also served as a lead business analyst for a variety of projects in support of the Connecticut DSS, Department of Publish Health (DPH), and Office of Health Strategy (OHS), including the establishment of the State's Health Information Exchange (HIE) and grant-funded research focusing on telehealth and behavioral health utilization during COVID.

Brigham & Women's Hospital, Division of Pharmacoepidemiology & Pharmacoeconomics (05/2018 – 06/2019)

Chris worked as a Research Trainee devise and conducted an independent research project relating to opioid and Opioid Use Disorder (OUD) treatment prescribing rates in Medicaid programs between 2008 and 2017. He scanned all 50 state legal codes for legislation on prescription drug monitoring programs, prescription limitations, and continuing medication education mandates and merged the data with Medicaid State Drug Utilization claims data into longitudinal datasets. He ran multivariate regressions and interrupted time series analyses on prescribing and policy data sets in R/SAS, drafting the results of these analyses for publication in a major American public health journal.

HAVEN Free Clinic (12/2017 – 02/2019)

Chris worked as the Co-Director of Pharmacy at the HAVEN Free Clinic, a student-lead and -operated free clinic based out of the Yale medical professional schools that aimed to treat New Haven's under- and uninsured populations. Chris managed all aspects of the clinic's in-house pharmacy, including maintaining the formulary, overseeing medication dispensing, consulting with medical teams on cost-benefit decisions, researching CT Medicaid eligibility options and medical coverage, and ensuring volunteer and patient satisfaction. He developed and conducted internal quality improvement projects on fill/delivery efficiency and medication adherence.

Rennert International (08/2015 – 08/2017)

Chris worked as a Manager in Sales & Marketing to establish, maintain, and develop relations with over 500 vendors and business partners. He compiled and analyzed data on partner performance and market trends for use in product development.

b BerryDunn

Alex Flower

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Business Administration, Grand Canyon University

Overview

Alex has extended experience in advanced data analysis and project management, demonstrated through developing comprehensive data analysis models and leading projects from start to finish while focused on continuous improvement. He presents with deep knowledge and experience related to managing data quality-related issues within complex Medicaid Management Information Systems (MMIS) modules, helping States to ensure data integrity, confirm logic, track utilization, and analyze trends related to healthcare and social services data. Alex demonstrates keen attention to detail through managing and supporting the development of streamlined communication and ticketing process templates, helping to improve cross-sector communication and promote best documentation practices throughout state agencies and across systems.

Experience

BerryDunn (10/2022 – present)

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

  WV Department of Human Services (DoHS)

  - *Child Welfare Initiatives Project Management Services (10/2022 – present)*
    Alex functions as a business analyst and data analyst assisting the project team with requirements gathering and data analysis to support development of dashboards and reports to aid in tracking and reporting for critical State social services and Medicaid-related programs. He works closely and communicates with the DoHS Office of Quality Assurance for Children's Programs (OQA), Bureau for Medical Services (BMS), Bureau for Behavioral Health (BBH), Bureau for Family Assistance (BFA), Bureaus of Social Services (BSS), and DoHS vendors to gather information and specify and negotiate requirements for data collections and reporting.

  WV Bureau for Medical Services (BMS)

  - *Data Improvement Project (10/2022 – present)*
    Alex serves as a data analyst assisting with data quality analysis and data profiling activities across social service and Medicaid Enterprise Systems,

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including WV's Enterprise Data Solution (EDS). He analyzes data pipeline gaps, identifies data lineage integration issues, and communicate findings to BMS and BMS's MMIS and data warehouse system vendors.

Mercer (02/2019 – 10/2022)

- *Associate Consultant (04/2021 – 10/2022)*
  Alex worked as a senior business and health informatics analyst with multiple State Medicaid Agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex developed and managed advanced Medicaid data analysis models that aided in development of rates, risk adjustment, rebates, specialty pharmacy pricing, and cost savings. He streamlined and improved communication and project management practices across teams. He developed and maintained a high-cost drug analysis that determines costly conditions across Medicaid membership to measure and account for trends in statewide factors and associated health costs. Monitored analysis use across teams. Alex managed issues and improvements backlog that aided in continuous product improvement and improved data integrity.

- *Government Consulting Senior Analyst (04/2020 – 03/2021)*
  Alex worked as a business and informatics analyst with multiple State Medicaid Agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex developed and maintained mental health data analyses for large quantities of Medicaid data focused on utilization review and healthcare outcomes. He improved documentation and program management practices that aided in cross-sector communication, analysis version control, and overall project quality. He led root cause research and documented results into business insights that increased product integrity; presented findings with team leads, cross-sector partners, and external clients. Alex developed ticketing request template for analyses that led to better cross-sector collaboration, clarity, and documentation.

- *Informatics Analyst (02/2019 – 03/2020)*
  Alex worked as an informatics analyst with multiple State Medicaid Agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex increased data processing and cleansing logic efficiency by 25% for large quantities of Medicaid data by implementing programming best practices, utilizing relational databases, and developing comprehensive documentation. He developed utilization review analyses using healthcare data, relational databases, and data from disparate sources. He created validation models that measured the validity of data and tracked key metrics on a quarterly and monthly basis.

b BerryDunn

Kourtney Kirk

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

Overview

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

Experience

BerryDunn (10/2022 – present)

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

   WV Department of Health and Human Services (DoHS)

   - *People's Access to Help (PATH) Eligibility and Enrollment Implementation Assistance (10/2022 – present)*
   - *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 – 01/2022; 10/2022 – present)*

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

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

      As a project coordinator for People's Access to Help (PATH), the Enterprise Data Solution (EDS), and MCES projects, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality

control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of Advance Planning Documents (APDs), project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the Project Management Office (PMO), client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

- o *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)

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

  WV Department of Health and Human Services (DoHS)

  - o *Medicaid and Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance (08/2020 – 01/2022)*

  - o *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (08/2020 – 01/2022)*

    As a project coordinator for both the MCES and EDS projects, Kourtney had a wide range of project duties. She created agendas and maintained meeting schedules and provided quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

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

- *Business Development Representative and Scheduling Coordinator (08/2019 – 08/2020)*
  Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AE's to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

- *Business Development Representative (03/2018 – 11/2018)*
  Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and also managed client relationships.

Total Quality Logistics (11/2018 – 08/2019)
Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pick-up and delivery of shipments. She communicated proactively customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glenville State University (08/2012 – 12/2017)
Kourtney served as the student intern, responsible for filing any donations made to the college. She used Razor's Edge and BlackBaud technology systems, communicated directly with GSC Alumni to request donations to the Glenville State College Foundation, and prepared presentations and marketing advertisements for the Foundation. She served as executive assistant to Call Stars program and assisted in the hiring process, entered contact information into contact management systems, and maintained tracking reports of public relations activity. Kourtney also performed analysis of donations made by Alumni and businesses and represented the goodwill of Glenville State College.

b) **BerryDunn**

Krista Clay

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

Overview

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

Experience

BerryDunn (11/2023 – present)

Krista is a consultant with BerryDunn's Medicaid Practice Group (MPG), supporting the following projects:

- **State of West Virginia (WV)**
  WV Department of Human Services (DoHS)
  WV Bureau for Medical Services (BMS)
  - *Payment Error Rate Measurement (PERM) Reporting Year 2023 (RY2023) Phase II*
  - *Substance Use Disorder (SUD) 1115 Waiver Project Phase V*
  - *Data Improvement Project (DIP) Phase 3*
  - *DIP Phase IV*
  - *Public Health Emergency (PHE) Support Phase II*
  - *Medicaid Information Technology Architecture (MITA) AA-A Annual*

Update 2021

- o *WV Technical Assistance and Project Support (TAPS) Subprojects*
- o *Mental Health Parity and Behavioral Health Support Project*
- o *American Rescue Plan (ARP) Community-Based Mobile Crisis Services Phases I & II*
- o *ARP Home Community-Based Services (HCBS) Implementation*
- o *People's Access to Help (PATH) Project*

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

TEKsystems (11/2022 – 11/2023)

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

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

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

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

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

   Krista was responsible for over $700,000 in the company's leasing sales. She planned meetings, organized schedules, and calendars, and provided updates on current resident/prospects. Krista was responsible for completing large volumes of leasing paperwork and oversaw the signing of leasing documentation. She managed administrative work to smooth new resident move-in processes, planned marketing and outreach strategies to consistently bring in new leasing prospects, and quickly addressed student and residential problems to avoid escalation and keep the residential environment peaceful and welcoming. She adhered to fair housing standards to help avoid any legal issues and help prevent discriminatory practices and tracked leasing

inquiries and vetted prospects with leasing systems to stay organized and efficient against leasing targets. Additionally, Krista organized events to engage residents and build a keen sense of community, met with board of directors to discuss community needs and resolve issues or disputes, and conducted 50+ showings per week to convert prospects into qualified residents.

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

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

YUM! Brands (09/2016 – 01/2018)

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

b **BerryDunn**

Megan Blount, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Paraprofessional
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Master of Business Administration, University of Charleston
	Bachelor of Science, Communications, West Virginia State University

Overview

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

Experience

BerryDunn (04/2021 – present)

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

- **State of WV**

  WV BMS

  - *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*
    Megan serves as a project coordinator for the APD Consulting Services project where she supports the strategic planning of APDs. In this role, Megan assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and management of multiple APD's in support of funding for new Department of Human Services (DoHS) systems projects.

  - *Public Health Emergency Support Project (12/2021 – present)*
    Megan provides project coordination, deliverable development and review, and tracks action items. Megan is involved with the creation of the Communications Plan and has assisted in creating trackers in SharePoint Online for project documents.

  - *Data Improvement Project (06/2021 – present)*
    Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.

- o *Payment Error Rate Measurement Reporting Year 2023 Review Project (04/2021 – present)*

  Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.

- o *WV Organization Development Project (07/2022 – 10/2023)*

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

- o *Provider Management Support (PMS) Project (11/2021 – 03/2023)*

  Megan provided project coordination, deliverable development and review, and monitored risks and issues related to all subprojects within PMS. Megan was involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.

- o *Third-Party Liability Post-Implementation (01/2022 – 03/2022)*

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

- o *Child Welfare Initiatives Phase III (12/2021 – 02/2022)*

  Megan provided project coordination, deliverable development and review, and tracked action items, as needed.

- o *Third-Party Liability Implementation Project (04/2021 – 06/2021)*

  Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.

- o *Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 – 02/2023)*

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

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

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

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

Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of

information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

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

- **Assistant Director, International Affairs (01/2016 – 10/2018)**

  Megan worked with both degree-seeking and non-degree-seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.

- **Assistant Director, Academic Educational Outreach (04/2014 – 01/2016)**

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

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

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

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)

  o *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.

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

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

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

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

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

Overview

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

Experience

BerryDunn (05/2022 – present)

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

    WV Department of Human Services (DoHS)

    - *Partnership Management (12/2023 – present)*
      Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the United States Virgin Islands (USVI). Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

    - *People's Access to Help (PATH) Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 – 03/2024)*
      Katie provides project coordination assistance to DoHS with planning and helping to manage the PATH MARS-E Security Assessment project. Katie helps with developing and reviewing project deliverables for various project-related activities and tasks.

    - *PATH DDI Project Management (03/2023 – present)*
      Katie provides project coordinator assistance with implementing the

b BerryDunn

PATH system. Katie helps with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.

WV Bureau for Medical Services (BMS)

o *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.

o *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.

o *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.

o *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*
Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ, now in its fourth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

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

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

b) BerryDunn

Shandia Benke, ECBA™

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

Overview

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

Experience

BerryDunn (04/2018 – present)

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

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

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

(04/2018 – 02/2019)

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 – 2016)*
  As a teacher, Shandia taught a range of subjects, including 6th Grade Grammar and Composition; 7th Grade Literature; Life Fitness; High School Psychology; Keyboarding; and Introduction to Computers.

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

Hentges Tree Service (2013 – 2015)

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

Wells Fargo Home Mortgage (2012)

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

b **BerryDunn**

Jordan Ramsey, MA, LSSGB

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

Overview

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

Experience

BerryDunn (07/2019 – present)

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

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

Portland Adult Education (2019)

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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

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

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

The Southern Illinoisan (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

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

- **Hardin County, IL**

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

- **NOVA Group of Japan**

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

b BerryDunn

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.

b BerryDunn

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 (*in progress*)

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.

b BerryDunn

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.

b BerryDunn

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.

b BerryDunn

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.

b) BerryDunn

Megan Hamilton, MA

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

Overview

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

Experience

BerryDunn (12/2022 – present)

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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

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

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

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

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

KD Dobyne

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

Overview

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

Experience

BerryDunn (09/2023 – present)

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

Qualtek Wireless (08/2022 – 09/2023)

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

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

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

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

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

students and parents by creating a welcoming admissions office environment and leading informational campus tours.

b BerryDunn

Appendix B: Deliverable and Artifact Dictionaries

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Each month, the State PMO will develop and deliver a status report to WV DoHS BMS leadership. The report will include a status of project deliverables and timelines, as well as associated project issues and risks.
02	Monthly Status Report	Each month, the State PMO will develop and deliver a status report to the DoHS Executive Steering Committee. The report will include a status of project deliverables and timelines, as well as associated project issues and risks.
03	Standardized SDLC Documentation	The BerryDunn team will work closely with the State to draft standard SDLC communication expectations and document templates to be shared across the Enterprise. Standard documentation to be collaboratively developed and prospectively shared includes: • Communication Plan Template • Release Notes Template • Standard Rosters and Distribution Lists
04	Jira® SDLC Workflow Development and Implementation	BerryDunn will provide overall PM services support for the development, implementation of, operationalizing of, and training for a State-approved SDLC and change management tracking workflow within the Atlassian Jira® project management tool.
05	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

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Table 5: Artifact Dictionary

Artifact #	Artifact Name	Artifact Description
01	Project Schedule	The Project Schedule will provide the schedule of tasks, milestones, and deliverables for the SDLC Coordination Project. The Schedule provides the tasks, timelines, dependencies, task owners, and high-level milestones for the project. It is expected that the work plan/schedule will be progressively elaborated upon as the project progresses, i.e., detailed tasks and sub-tasks will be added and/or updated as new information is gathered and decisions are made.
02	Action Item and Decision Log	BerryDunn will develop and maintain project action item and decision logs for the life of the project. The format, location, and approach to maintaining these logs will be further defined within the scope of this SOW.
03	Risks and Issues Log	BerryDunn will develop and maintain project risk and issue logs for the life of the project. The format, location, and approach to maintaining these logs will be further defined within the scope of this SOW.
04	Meeting Materials and Notes	In support of project-related meetings, BerryDunn will supply meeting facilitation, materials, and notes in all BerryDunn-owned meetings. Assistance with meeting facilitation, materials, and notes outside of meetings that BerryDunn did not schedule will require approval from the DoHS project sponsor and the BerryDunn project manager.
05	DIP SDLC Coordination Plan	The WV BMS DIP Phase IV Deliverable 07 SDLC Coordination Plan provides a strategic plan to help the State achieve system integration across its Medicaid and CHIP system vendors and will be used to support activities of the SDLC Coordination Project.
06	SDLC Process Implementation Document	The WV BMS SDLC Process Implementation Document operationalizes the SDLC Coordination Plan to help the State implement an effective change management process across its Medicaid systems and vendors and will be used to support activities of the SDLC Coordination Project.

b BerryDunn

Appendix C: Acronyms/Abbreviations

Table 6: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
BMS	Bureau for Medical Services
CAB	Change Advisory Board
CCB	Change Control Board
CHIP	Children's Health Insurance Program
CL	Commodity Line
CM	Care Management
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DIP	Data Improvement Project
DoHS	Department of Human Services
EM	Engagement Manager
Gen	General
GPM	General Project Manager
HIPAA	Health Insurance Portability and Accountability Act
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MES	Medicaid Enterprise System
MCO	Managed Care Organization
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MPG	Medicaid Practice Group
OM	Operations Management
PM	Project Management
PMBOK®	Project Management Book of Knowledge®
PMI®	Project Management Institute®
PMO	Project Management Office

b) BerryDunn

Acronym/Abbreviation	Definition
PPACA	Patient Protection and Affordable Care Act
PR	Puerto Rico
SDLC	Systems Development Lifecycle
SME	Subject Matter Expert
SMM	Summary of Material Modifications
SOW	Scope of Work
SS	Support Staff
State	West Virginia
T-MSIS	Transformed Medicaid Statistical Information System
USVI	United States Virgin Islands
WV	West Virginia

Keyword Search

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

Simple Search	**Search Editor**

○ Any Words ⓘ

○ All Words ⓘ

○ Exact Phrase ⓘ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"	✕

Entity ⌄

Location ⌄

Status ⌃

☑ Active

☐ Inactive

Reset ↻

ⓘ

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information

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

Organization Information

Business Purpose	5416 - Professional, Scientific and Techincal Servies - Professional, Scientific and Techincal Servies - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)	Capital Stock	
Charter County	Kanawha	**Control Number**	0
Charter State	ME	**Excess Acres**	
At Will Term	A	**M** **M**	
At Will Term Years		**Pa**	

× Close

Hi, I'm SOLO! I can help you file your Annual Report.

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	

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

Annual Reports

Filed For
2023
2022
2021
2020
2019
2018
2017
2016
2015
2014
2013
2012
2011
2010
2009
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For more information, please contact the Secretary of State's Office at 304-558-8000.

Tuesday, June 4, 2024 — 2:12 PM

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