



Department of Administration
Purchasing Division
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State of West Virginia Delivery Order

Order Date: 05-31-2024

CORRECT ORDER NUMBER MUST APPEAR
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CONCERNING THIS ORDER SHOULD BE
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Order Number:	CDO 0511 2680 BMS2400000058 1	Procurement Folder:	1440614
Document Name:	Justice-Involved Program Support (JIPS) Project	Reason for Modification:	
Document Description:	Justice-Involved Program Support (JIPS) Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

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

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

Purchasing Division's File Copy

Total Order Amount: \$1,078,740.00

CH 6/4/23

PURCHASING DIVISION AUTHORIZATION

DATE: *Tanya G 6/4/24*
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

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

Extended Description:

Justice-Involved Program Support (JIPS) Project

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

Total: \$1,078,740.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$27,950.00
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

130 hours @ \$215 = \$27,950.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$17,550.00
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

65 hours @ \$270 = \$17,550.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$678,600.00
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

3,770 hours @ \$180 = \$678,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$354,640.00
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

4,433 hours @ \$80 = \$354,640.00



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 Justice Involved Program Support (JIPS) 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,

DocuSigned by:

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

Ok


West Virginia Department of Human Services Bureau for Medical Services

Justice-Involved Program Support (JIPS) Project

Staffing Plan and Scope of Work (SOW)

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



Submitted by:

BerryDunn
300 Capitol Street
Charleston, WV 25301
681.313.8905

Ed Daranyi, PMP®, Principal

edaranyi@berrydunn.com

Emily McCoy, PMP®, Senior Manager

emccoy@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) Justice-Involved Program Support (JIPS) Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS), Bureau for Medical Services (BMS). The work completed under the Justice-Involved Program Support (JIPS) Project will be completed in accordance with the terms and conditions of Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and West Virginia DoHS.

1.0 Introduction

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Staffing Plan and SOW. BerryDunn considered the following information in preparing this SOW.

1.1 Key Information

The objective of this project is to assist BMS with the increasing needs for system, data, and policy integration related to members who are being released from carceral settings. This project will consist of two phases of work.

The first phase is designed to be a preliminary planning phase for work related to in-progress or upcoming initiatives and program changes focusing on the justice-involved member population.

The second phase of work will be the implementation and operationalization phase, building on the planning work completed during phase one.

These services will support the JIPS Project goals of providing project management, subject matter expertise, stakeholder engagement coordination, and program support.

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

- Gen 1.0 – Improve the State’s effectiveness and efficiency.
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations.
- Gen 5.0 – Ensure program quality.
- Gen 6.0 – Enhance and improve efficient, effective, and meaningful outreach and communication.
- CM 1.0 – Improve healthcare outcomes for members.
- OM 1.0 – Improve operational efficiency and reduce costs in the healthcare system.



- PL 1.0 – Enhance the DoHS's ability to analyze the effectiveness of potential and existing benefits and policies.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of BMS Commissioner, Cynthia Beane and BMS Deputy Commissioner, Sarah Young as the project sponsors.
- Deputy Commissioner Sarah Young will serve as the primary State project lead for the project.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Eduardo "Ed" Daranyi as engagement manager, Emily McCoy as lead project manager, and Peter Alfrey and Ethan Wiley providing contract and portfolio oversight. Susan Chugha will serve as program manager. Azba Hotelwala will serve as project lead.
- This JIPS Project work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 13 months.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the BMS project sponsor.
- BerryDunn will provide deliverables in an agreed-upon format.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and leverage any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) WV-2024-01-08-MMIS-APDU-MITA for this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 27, 2024, for total State and federal funds in the amount of \$95,085,478.00, as well as related unique project identifiers (UPIs) for the purposes of this SOW. The estimated cost of the services delivered under this SOW is \$1,078,740.00 (included in the approved IAPD). Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.



2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon acceptance of the D07: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Eduardo "Ed" Daranyi</p> <p>Emily McCoy</p> <p>Ethan Wiley</p> <p>Peter Alfrey</p> <p>Dawn Webb</p> <p>Susan Chugha</p> <p>Azba Hotelwala</p>	1,000
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings 	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Azba Hotelwala</p> <p>Krista Clay</p>	3,264



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Timeline D04: Project Kickoff Deck <p>Artifact(s)</p> <ul style="list-style-type: none"> A01: Action Item and Decision Log A02: Risk and Issues Log <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon successful completion of the project and acceptance of Deliverable 07: Project Closeout Summary by the project sponsor or his/her designee.</p>		
3.0	<p>Phase I and Phase II Initiatives</p> <p><i>Service Approach</i></p> <p>BerryDunn's project team will meet with the State project lead and/or its designee(s) in addition to other key stakeholders on a regular basis to discuss project status and work toward completing all deliverables in a timely manner. Phase I and II Initiatives activities may include but not be limited to:</p> <ul style="list-style-type: none"> Research and research findings summaries Facilitation of workgroups for system changes, billing, training needs, and other related JIPS initiatives Development of an operations and implementation workplan Monitor and track federal guidance across the justice-involved population. Draft State Plan Amendment (SPA) documents, as needed. Support to address SPA comments from CMS 	<p>Ethan Wiley Susan Chugha Azba Hotelwala Peter Alfrey Emily McCoy Ashley Pannell Dina Nash Julie Bandy Kitty Purington Krista Clay Hailey Holden Katie McDonald Cate Poling Kourtney Kirk Shandia Benke Alex Glowacky Alycia Minshall Caitlin Cabral Carole Anne Guay</p>	4,034



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Provide technical assistance as determined by the State project lead and/or designee(s) <p>Deliverable(s)</p> <ul style="list-style-type: none"> D05: SPA Materials, as needed D06: Implementation Plan <p>Artifact(s)</p> <ul style="list-style-type: none"> A03: Research summaries <p><i>Completion Criteria</i></p> <p>All parties will deem Phase I and Phase II Initiatives complete upon successful completion of the project and acceptance of Deliverable 07: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Emily Hendrickson</p> <p>Janine DiLorenzo</p> <p>Jon Williams</p> <p>Jordan Ramsey</p> <p>Megan Hamilton</p> <p>KD Dobyne</p>	
4.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to BMS at project close. Additionally, the Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D07: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will consider Project Closeout complete when the State project sponsor or their designee formally accepts the Project Closeout Summary.</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Azba Hotelwala</p>	100
Total Hours			8,398
Total Not-To-Exceed Cost Estimate			\$1,078,740



3.0 Project Resources and Hours

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

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

- Commodity Line 9: Engagement Manager (EM) (\$270/hour)
- Commodity Line 8: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 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	Ed Daranyi	65	\$17,550
8	LPM	\$215	Emily McCoy	130	\$27,950
11	GPM	\$180	Peter Alfrey	390	\$70,200
11	GPM	\$180	Ethan Wiley	390	\$70,200
11	GPM	\$180	Dawn Webb	195	\$35,100
11	GPM	\$180	Susan Chugha	390	\$70,200
11	GPM	\$180	Ashley Pannell	845	\$152,100
11	GPM	\$180	Julie Bandy	910	\$163,800
11	GPM	\$180	Kitty Purington	650	\$117,000
12	SS	\$80	Azba Hotelwala	975	\$78,000
12	SS	\$80	Dina Nash	910	\$72,800
12	SS	\$80	Alex Glowacky	195	\$15,600
12	SS	\$80	Krista Clay	975	\$78,000
12	SS	\$80	Hailey Holden	65	\$5,200
12	SS	\$80	Katie McDonald	65	\$5,200
12	SS	\$80	Cate Poling	26	\$2,080
12	SS	\$80	Kourtney Kirk	26	\$2,080
12	SS	\$80	Shandia Benke	26	\$2,080
12	SS	\$80	Alycia Minshall	130	\$10,400
12	SS	\$80	Caitlin Cabral	130	\$10,400



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Carole Anne Guay	130	\$10,400
12	SS	\$80	Emily Hendrickson	130	\$10,400
12	SS	\$80	Janine DiLorenzo	130	\$10,400
12	SS	\$80	Jon Williams	130	\$10,400
12	SS	\$80	Jordan Ramsey	130	\$10,400
12	SS	\$80	Megan Hamilton	130	\$10,400
12	SS	\$80	KD Dobyne	130	\$10,400
Totals				8,398	\$1,078,740



4.0 Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month #	EM	LPM	GPM	SS	Est. Hours Per Month	Est. Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	5	10	290	341	646	\$82,980
Month 2	5	10	290	341	646	\$82,980
Month 3	5	10	290	341	646	\$82,980
Month 4	5	10	290	341	646	\$82,980
Month 5	5	10	290	341	646	\$82,980
Month 6	5	10	290	341	646	\$82,980
Month 7	5	10	290	341	646	\$82,980
Month 8	5	10	290	341	646	\$82,980
Month 9	5	10	290	341	646	\$82,980
Month 10	5	10	290	341	646	\$82,980
Month 11	5	10	290	341	646	\$82,980
Month 12	5	10	290	341	646	\$82,980
Month 13	5	10	290	341	646	\$82,980
Totals	65	130	3,770	4,433	8,398	\$1,078,740



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 Phase I and Phase II Initiatives													
4.0 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

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Signature

5/20/2024

Date

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

Signature

5/29/2024

Date



Appendix A: Resumes

Eduardo “Ed” Daranyi, MEd, PMP®

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

Overview

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

Experience

BerryDunn (09/2005 – present)

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

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

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

- *Engagement Manager (2012 – present)*

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



multitude of WV projects and initiatives.

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



Project (05/2017 – 07/2018)

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



Development

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



and delivery approaches to reform systems of care for individuals with SUD.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 – present)*
Ed has been the engagement manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and bureau structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DoHS goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Data Visioning and Warehouse Development and Procurement Assistance (2012 – present)*
Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the DW/DSS, develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DoHS databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DoHS in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DoHS.
- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*
Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed also focused on establishing and assisting in the management of change management processes and participated in the certification process and report process development.

WV Department of Human Services (DoHS)

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



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

- E&E System Modernization
- Procurement Services
- Eligibility Systems Planning, Procurement, and Implementation
- *People's Access to Help (PATH) DDI Project Management (10/2017 – present)*
Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise integrated eligibility system (IES), known as PATH. PATH supports the eligibility, enrollment, and administration of the Department of Human Services' (DoHS) programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables are met and risks and issues are appropriately escalated and addressed.
- **Maine Department of Health and Human Services (DHHS)**
 - *Independent Verification & Validation (IV&V) and QA Services (04/2008 – 06/2012)*
BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing, and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of the team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

BerryDunn also performed a point-in-time readiness assessment for several Pharmacy system initiatives for Maine DHHS, including a HIPAA 5010 transaction set readiness assessment and a pharmacy-related provider portal. Ed served as project manager for this assessment.
- **North Carolina Office of the State Auditor**
 - *Independent Audit of the State IT Services EPMO (04/2007 – 06/2007)*
BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of the evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be



brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

Martin's Point Health Care (2005 – 2007)

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

Goold Health Systems (1999 – 2005)

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

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

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

- *Maine DHHS (05/2001 – 01/2002)*

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

Electronic Data Systems (1985 – 1988)

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

Presentations



Flexible Contracting and Contracting Best Practices, Presentation for MESC 2014, 08/19/2014
Project Management/Testing, Presentation for NESCSO workshop (2017)

Moderator, MESC Conference sessions (2015-2019)

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

Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together toward the future and MESC 2020: Where we are today and where we will be tomorrow.



Emily E. McCoy, RN, BSN, PMP®

Proposed Project Role:	Lead 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 the area of Centers for Medicare & Medicaid Services (CMS) certification.

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

WV Department of Human Services (DoHS)

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



Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with unwinding efforts and get the policies and eligibility processes back to a pre-COVID state once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*
Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
- *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*
Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services (DMAHS)**
 - *MMIS Modernization (7/2022 – 12/2023)*
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
 - *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA**



- *Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 – 04/2017)*

Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

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

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

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

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

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

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



Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.

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

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

Transitional Care Unit (05/1999 – 12/2002)

- *Clinical Management Coordinator*
Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
- *MDS Coordinator*
Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally-mandated Resident Assessment Instrument (RAI) process.
- *Clinical Nurse II*
Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.

Neuroscience Unit (01/1998 – 05/1999)

As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:

- Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
- Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
- Serving as a representative on the Standards and Practice Council and Procedures



sub-committee

- Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
- Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients

Behavioral Health Unit (07/1996 – 01/1998)

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



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

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

Overview

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

Experience

BerryDunn (03/2014 – present)

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

- **State of WV**

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

- *Portfolio Manager – West Virginia Engagement: Portfolio Management Office*



(09/2018 – present)

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

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



- **Washington Health Care Authority (HCA)**
 - *Public Health Emergency Unwind Project (03/2023 – 12/2023)*
Peter served as Engagement Manager for the project, helping support the HCA's PHE unwinding efforts by overseeing the BerryDunn project team's project deliverables and reporting, supporting coordination of Washington inter-agency meetings and information sharing, and providing stakeholder management services.
- **New Jersey Division of Medical Assistance and Health Services**
 - *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 08/2017)*
Peter supported testing efforts for New Jersey MMIS implementation in areas such as Systems Integration Testing (SIT) test case and results review, SIT test case analysis, User Acceptance Testing (UAT) support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the WV MMIS procurement in 2015.
- **Vermont Green Mountain Care Board (GMCB)**
 - *Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 – 09/2014)*
Peter led the efforts to help the GMCB build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.
- **Maryland Health Benefit Exchange (HBE)**
 - *Independent Verification & Validation (IV&V) for Maryland's HBE Implementation (03/2014 – 04/2014)*
As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas such as project management, operations and maintenance, training, quality management and testing, requirements management, architecture, software development tools and release management, software product development, operations, and maintenance, and security.

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

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



Health Dialog (07/2006 – 11/2008)

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.



Ethan Wiley, MPPM, PMP®, CCP, LSSGB

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

Overview

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

Experience

BerryDunn (07/2014 – present)

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

- **State of West Virginia (WV)**
 - WV Bureau for Medical Services (BMS)**
 - American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project



(05/2021 – present)

Serving as program manager and lead, Ethan oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for State Medicaid spending on HCBS. The increased FMAP allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for WV. The project continues in the implementation stage where Ethan leads workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *WV Certified Community Behavioral Health Center (CCBHB) Project (07/2021 – present)*

As portfolio Manager Ethan oversees a BerryDunn team working to create a new State Plan Amendment for WV Medicaid to implement new and expanded health and behavioral health services. Specifically, CCBHCs are a specially-designated clinic that provides a comprehensive range of mental health and substance use services.

- *ARPA Section 9813: Mobile Crisis Grant Project (07/2021 – present)*

Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.

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

In order to help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (State and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training State stakeholders on the new process flow.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 – 10/2021)*

As program manager, Ethan oversaw a team that assisted DoHS in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as



prescribed by CMS. The objective of this project was to assist the DoHS with MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

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



both solution and financing alternatives for the State to conduct their Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across WV's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 – 12/2016; 06/2017 – 12/2017)*
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a State-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 – 02/2016)*
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 – 12/2015)*
As business analyst, Ethan was brought in to organize and complete the final development of a State Medicaid agency project to develop a major RFP to select a utilization management vendor.
- **WV Bureau for Children and Families**
 - *Project Management for Enterprise Content Management (ECM) Project (08/2015 – 02/2016)*
Ethan served as interim project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple State agencies, and facilitated a smooth implementation.
- **Minnesota Department of Human Services (DHS)**
 - *Program Analysis of Implementation of a PACE Program (09/2023 – present)*
Ethan currently serves as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversees the development of project deliverables, and directs project work for a team of five. In addition, Ethan serves as primary point of



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

Delaware Division of Medicaid & Medical Assistance

- *Advance Planning Document (APD) Consulting (05/20221 – present)*
As project manager, Ethan leads a team focused on helping the State of Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.

Puerto Rico Department of Health (PRDoH)

- *State Plan Support – (12/2020 – 10/2021)*
In order to support the Puerto Rico Medicaid Program (PRMP), Ethan served as a Subject Matter Expert for BerryDunn's State Plan work. In this role, Ethan researched and analyzed the Medicaid State Plan, drafted amendments, and reviewed State Plan materials. Ethan's work included analyzing state plan provisions related to Hospital Based Presumptive Eligibility (HBPE), Modified Adjusted Gross Income (MAGI), and other major eligibility provisions of the State Plan.

Nebraska Department of Motor Vehicles

- *Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 – 02/2017)*
As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current State assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

Michigan Department of Education

- *Early Childhood Data Governance Structure (03/2016 – 06/2016)*
As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

Colorado DHS

- *Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 – 10/2014)*
Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado DHS. As part of this project, he researched and analyzed State policy and vendor solutions and supported analysis of future system costs and impacts.



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

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

Overview

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

Experience

BerryDunn (08/2017 – present)

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

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

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

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

As client and engagement operations manager, Dawn provides engagement support in process improvement, best practices, staffing allocations, and project managers for the WV Engagement. Dawn also provides project oversight for the following projects:

- *Payment Error Rate Measurement (PERM) (05/2018 – present)*
 - *APD Consulting Services (05/2023 – present)*



- *Partnership Management Support (December 2023 – present)*
- *Quality Improvement Initiatives Portfolio Manager (05/2019 – 01/2024)*
 As quality improvement initiatives portfolio manager, Dawn provides project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, PERM), and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:
 - MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)
 - Data Improvement Project (09/2019 – present)
 - Public Health Emergency (PHE) Support (12/2021 – present)
 - Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)
 - Provider Management Support (11/2019 – present)
 - State Plan Review and Support (SPRS) (02/2020 – present)
 - Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)
 - Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)
- *Partnership Management Support (December 2023 – present)*
 Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.
- *APD Consulting Services (05/2023 – present)*
 Dawn currently manages the BerryDunn team for the WV Engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as-needed updates to 10 established APDs.
- *PERM Project (05/2018 – present)*
 Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery



package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

- **MMIS Fee Schedule and Edit Quality Review (09/2017 – present)**
Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.
- **TPL Procurement (05/2019 – 03/2022)**
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
- **Colorado Office of State Auditor (OSA)**
 - **Recovery Audit Contractor (RAC) (09/2023 – present)**
As the Medicaid Manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist the Government Assurance Practice Group (GAPG) within BerryDunn in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF) – the Colorado SMA, and the HCPF RAC vendor to gather information and address the findings of the evaluation.
- **United States Virgin Islands (USVI)**
 - **Project Management and APD Support (10/2022 – present)**
Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
 - **Medicaid Organizational and Business Process Redesign (11/2021 – 06/2022)**
Dawn supported the MDQ in PERM corrective action planning and response.
- **State of Alaska, Division of Legislative Audit (DLA)**
 - **National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)**
Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

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

Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts



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

Unisys (06/2004 – 11/2009)

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

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

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

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

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

Garnet Career Center (02/1999 – 01/2000)

Dawn worked as a medical coding instructor for the career center.

University Health Associates (09/1996 – 07/2001)

Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

Acordia National (12/1994 – 05/1996)

Dawn began her career as a medical claim examiner.



Susan Chugha, CCP

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

Overview

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

Experience

BerryDunn (10/2015 –present)

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

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

WV Bureau for Medical Services (BMS)

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

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



period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

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

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

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

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

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

Susan was the project manager for the DIP Phase 3 project. Susan was responsible for providing oversight to the project team on the day-to-day activities, handles meeting facilitation, peer review and monitors progress with all deliverables tracked



against the agreed-upon schedule that will address data quality and usability issues identified within the Medicaid program.

- *State Plan Review and Support (SPRS) Project (03/2020 – present)*
As program manager, Susan oversees the project and BerryDunn team that handles updates to State Plan sections, attachments, supplements, and develops amendments.
Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages are in compliance, compared service descriptions to federal and State guidance, and analyzed pages for overall accuracy.
American Rescue Plan Act of 2021, Section 9817 Home and Community-Based Services (HCBS) Implementation Plan (05/2022 – present)
As project lead, Susan oversees the day-to-day operations for this project, conducts research, and monitors the successful completion and submission of project and federal deliverables.
- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 – present)*
Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.
- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) Phase IV (09/2018 – present)*
As program manager for the CSEDW Phase IV project, Susan oversees the project team through oversight, project management, technical assistance, and monitoring risks and issues. Prior to Phase IV of the project, Susan helped monitor progress on the preparation of the CSEDW waiver renewal application.
In 2018 Susan served as the project coordinator for the CSEDW project. Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of WV.
- *Certified Community Behavioral Health Center (CCBHC) SPA Project Phase II (11/2023 – present)*
As program manager for the CCBHC SPA Project Phase II, Susan oversees the project team through oversight, project management, budgeting, and monitoring risks and issues. Susan has supported the project manager with meeting facilitation duties, client relations, assisted in the development of the provisional certification status application, and contributed to the reviews and scoring sessions of the provider provisional certification applications to help identify providers that would be awarded provisional certification as a CCBHC provider type.



- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Projects I and II (07/2021 – 11/2023)*
Serving as program manager, Susan oversaw this project and provided subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Susan participated in writing and planning assistance for the “State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services” planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Susan’s project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.
- *CCBHC SPA Project (09/2022 – 8/2023)*
As program manager for the CCBHC SPA Project, Susan was responsible for oversight of the project team, assisted with project management, tracked the project budget, and monitored any risks and issues.
- *OD Services Project (05/2022 – 11/2023)*
As a business analyst (BA) on the OD project, Susan assisted with client relations, retreat planning and coordination, research, and writing assignments that helped to inform strategic planning documents, in addition to other identified deliverables per the agreed-upon SOW.
- *Provider Enrollment Application (PEA) Project (02/2017 – 11/2017)*
Susan provided project coordination assistance by maintaining all of the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV PEA process.
- *ICD-10 Transition Planning and Implementation (10/2015 – 02/2016)*
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

Independent Consultant (08/2010 – 10/2014)

Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider



relationships, scheduling of both professional and personal appointments, and making travel arrangements.

Columbia Management (09/2012 – 10/2013)

Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

Evergreen Investments (06/2004 – 05/2009)

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

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

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

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



Ashley Pannell, EMBA, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	<p>Executive MBA – Specializations: Managing Software Development, Advance Finance, Advance Corporate-Level Strategy, Strategic Thinking, and Statistical Analysis, Quantic School of Business and Technology</p> <p>Master of Science – Psychology, Applied Behavioral Analysis, Purdue University</p> <p>Bachelor of Fine Arts – Theater and History Education, Shenandoah University</p> <p>Aha! Project Management Certification</p> <p>Microsoft Business Analyst</p>

Overview

Ashley is a highly skilled subject matter expert and human services professional with 15+ years' experience managing Healthcare programs, specializing in Long Term Services and Supports (LTSS), State Waivers, Eligibility, Case Management, Medicaid Managed Care, Public Policy, Medicaid Enterprise Systems and Medicaid Management Information Systems (MES/MMIS) and Home and Community Based Services (HCBS) at both local and state levels. She is a strategic advisor with a proven ability to analyze data, identify risks, execute compliance requirements and expand Medicaid services.

Experience

BerryDunn (04/2024 – present)

Ashley is a senior consultant with BerryDunn's Medicaid Practice Group (MPG), lending her extensive knowledge base within the Medicaid and health and human services realm to support the West Virginia Children with Serious Emotional Disorders (CSED) Waiver Project.

Commonwealth of Virginia (VA) (12/2016 – 04/2024)

As a Service Authorization Consultant, Ashley helped ensure that the Department of Behavioral Health and Developmental Services waivers' service authorization system



met all performance metrics within 10 business days, delivered high-quality service to users, and optimized the allocation of finances to members receiving Medicaid funded services in Virginia. Ashley consulted with 1,300 providers, stakeholders, and all 41 community services boards, ensuring compliance with VA Medicaid and Centers for Medicare & Medicaid Services (CMS) requirements using the VA MMIS. Additionally, she served as a subject matter expert (SME) on waiver and HCBS services for Medicaid within the Department of Behavioral Health and Developmental Services, using analytical data from the Virginia Waiver Management System, DMAS, and CMS regulations.

Ashley was responsible for analyzing Medicaid eligibility, provider enrollment, provider claims, and customized rate for providers using the VA MMIS. In her role, she helped oversee the reduction of Medicaid provider payment errors by 20% in 3 months, leveraging data analytics to predict trends and promoting stakeholder engagement and training; the increase of Medicaid HCBS reimbursements by 25% in six months, utilizing analytics and data models; and the reduction of new enrollment eligibility errors by 40% by developing a comprehensive strategic plan improving program operations and compliance within one year. Ashley conducted compliance reviews of HCBS providers and CSBs via documentation and on-site visits, advised and collaborated with senior leadership on statewide policy development, implementation, and monitoring, and helped increase Medicaid waiver approval rate by 30% in six months, leveraging data analysis and stakeholder engagement. Ashley also developed and collaborated on Advance Planning Documents (APDs) for CMS submissions, all of which were approved and authorized.

Guillory Health (07/2015 – 01/2017)

As a Program Administrator, Ashley worked to improve Medicaid intellectual disabilities program operations' efficiency by 28% in seven months, using data analytics and SAS. She responded to state-wide healthcare reform by driving cost savings of 15% through quantitative analysis and developed and implemented new strategic initiatives resulting in 40% revenue increase in nine months. Ashley improved operational efficiency by 25% in five months, streamlining healthcare reform compliance processes and successfully increased staffing by 30% in six months through utilization of outcome-based initiatives such as electronic visit verification (EVV). In this role, Ashley achieved 90% and above compliance on three consecutive audits.

Fairfax County Government 05/2011 – 05/2015)

As a Support Coordinator, Ashley improved program operations and compliance for a large state health agency in three months, resulting in 35% expansion in services and led 70+ interdisciplinary teams by consulting, coordinating, implementing, and monitoring delivery of timely and satisfactory services to clients. In this role, Ashley saw to the successful expansion of state healthcare services in VA, discharging 100+ clients to community-based care in two years and in compliance with DOJ HCBS rule 1915(c). Ashley led the implementation of healthcare reform initiatives across 10



counties in Virginia, resulting in a 35% efficiency improvement in six months. She collaborated on the development of innovative HCBS and behavioral health payment system design for state Medicaid agencies, resulting in improved reimbursement in 55 weeks and increased stakeholder satisfaction.

ServiceSource, Inc. (03/2011 – 05/2011)

As a Program Manager, Ashley received full authorization of services for 200+ participants; increased reimbursement rate setting efficiency by 40% in two months via HCBS/behavioral health expertise; and increased Medicaid waiver access by 15% in two months by partnering with community business and stakeholders to develop and implement innovative solutions.

LifeLine of Virginia (04/2010 – 03/2011)

As a Program Manager, Ashley supported restructured billing, increasing revenue by \$700k in seven months via process streamlining and cost-savings. She supported increased state compliance requirements by 70% in 24 weeks through strategic planning, research, data analysis, and collaboration. Ashley also oversaw increased funding by 45% through stakeholder engagement by partnering with Fairfax County businesses and developers within eight months. She helped accelerate the program from a provisional to a full license through strategic planning and oversight within six months and developed and submitted Requests for Proposals (RFPs) that resulted in the selection of qualified vendors for \$2 million in projects in VA and Maryland.



Julie Bandy

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

Overview

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

Experience

BerryDunn (12/2022 – present)

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

WV Department of Human Services (DoHS)

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



- responsible for interpretation of requirements, identifying gaps in current system, and research support.
- *Data Improvement Project (DIP) (03/2023-06/2023)*
Julie served the DIP as a subject matter expert, supporting the project manager with project management duties including development and review of materials.

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

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

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

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

Jacobs Home, Inc (12/2005 – 10/2007)

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

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

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

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

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

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

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



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

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



Kitty Purington, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	28 years
Certifications and Education:	Juris Doctor, University of Maine School of Law Bachelor of Arts in History and Spanish, University of Massachusetts

Overview

Kitty is a skilled Senior Consultant with nearly 30 years of experience with Medicaid. She has served in multiple leadership positions in state agencies, community organizations, and national non-profit organizations. She has a strong background in policy research and analysis, vendor and stakeholder management, and development and implementation of programs.

Experience

BerryDunn (05/2022 – present)

Kitty serves as a Subject Matter Expert (SME) with the Medicaid projects in West Virginia (WV) and Puerto Rico (PR). As a SME, she analyzes and provides consultation on a range of state and federal Medicaid policy issues, including emerging Medicaid options and model practices for behavioral health, health-related social needs, and long-term care. Kitty has extensive experience drafting state plan documents, policy papers and summaries, technical reports, and other policy documents and research materials. Kitty participates in team meetings and client meetings, including client meetings with the Centers for Medicare and Medicaid Services (CMS), and is able to share information, expertise and perspective from her previous role in Medicaid policy management.

National Academy for State Health Policy (NASHP) (04/2015 – 05/2022)

As Senior Program Director, Kitty led the Behavioral Health, Aging, and Disability portfolio for NASHP, a national, non-partisan, mission-driven organization that supports state leaders in their work to improve health policy. She worked with private foundations, federal agencies, states, and partner organizations to develop and implement multiyear projects that focused on delivery system transformation, payment reform, implementation of best practices, and other policy innovations. Kitty designed and oversaw technical assistance and learning opportunities to support state policy makers in their work on numerous Medicaid topics including physical and behavioral health integration, behavioral health data and quality; behavioral health crisis systems, palliative care policy, long-term care, and value-based payment. Kitty oversaw the development and dissemination of briefs, blogs, webinars and other resources for state Medicaid, behavioral health, and long-term care officials, and facilitated meetings, webinars, and conference sessions to assist state health officials in problem solving and sharing best



practices. Kitty has presented at state and national conferences on behavioral health and long-term care and has served in an advisory capacity to numerous state and federal initiatives, including the National Academies for Science, Engineering and Medicine's Roundtable on Quality Care for People with Serious Illness, and the National Council for Community Behavioral Health Policy Committee. She supervised a team of professionals to manage grant development, contracts, budgets, and staffing.

Office of MaineCare Services (OMS) (06/2012 – 04/2015)

Kitty worked as the Program and Policy Manager of Value-Based Purchasing with MaineCare, Maine's Medicaid agency, overseeing the development, implementation, and ongoing growth and improvement of OMS practice transformation and value-based purchasing initiatives. She developed and implemented the state's Health Home regulatory framework (state plan amendments, Medicaid regulation, provider contracts, licensing and certification related to payment and provider requirements) in collaboration with OMS Office of Policy and State Attorney General's Office. Kitty worked with OMS Operations team and external vendors to implement an online portal and set of tools for primary care and behavioral health providers to support population-based care coordination, integration, and quality improvement. Kitty collaborated with internal and external stakeholders (related state agencies, providers, peer leaders, family and advocacy organizations) on program development, implementation and quality improvement; oversaw communications, including production of member materials, provider communications and technical assistance, webinars, and public forums; and developed the State Innovation Plan and behavioral health-related initiatives as part of a successful \$30 million CMS State Innovation Model grant. Kitty served as liaison post-award on projects such as HIE connectivity for Behavioral Health Home providers, learning collaboratives, and work force development, and developed the concept paper for the state's accountable care organization initiative.

NASHP (01/2009 – 06/2012)

Kitty worked as a Policy Specialist, managing NASHP activities and deliverables under a five-year project funded by the Substance Abuse and Mental Health Services Administration focused on promoting evidence-based practices for adults, older adults, and children with behavioral health needs in state Medicaid programs. She designed and fielded a comprehensive state policy survey to capture current data on state Medicaid support for Assertive Community Treatment, Supportive Housing, Medication Assisted Treatment, and other evidence-based services. She provided technical expertise and analysis on Medicaid and other state policies topics, including behavioral health, value-based purchasing, health information technology and exchange, data analytics, behavioral health privacy and confidentiality issues, and quality measurement. She also developed materials and facilitated activities to promote state learning objectives.

Community Counseling Center (01/2007 – 01/2009)

Kitty served as the Director of Government and Business Affairs for a large community mental health center. In this role Kitty identified new business opportunities and strategic initiatives for the organization, resulting in programs and partnerships to support physical and behavioral



healthcare integration, school-based health centers, and pre-trial behavioral health supports for corrections-involved women. Kitty provided ongoing analysis and information regarding regulatory, reimbursement, and policy changes at federal, state, and local level.

Maine Associations of Mental Health Services (11/2001 – 01/2007)

Kitty served as Interim Executive Director and Policy Analyst, providing leadership and strategic planning to the board of directors on a variety of issues for a statewide trade association of mental health and substance use disorder provider organizations. Her role included development of a new governance structure and bylaw changes, and planning and implementation of an annual legislative agenda. She worked with state and federal agencies in advocacy, interpretation, and development of rules, legislation, and standards pertinent to reimbursement and delivery of behavioral health services. She represented the Association in a variety of forums, including as chair of the Governor's Medicare Part D Implementation Task Force, chair of the state Medicaid Advisory Committee, and member of the Policy Committee of the National Council for Community Behavioral Health.

Legal Services for the Elderly (12/1998 – 11/2001)

Kitty worked as a Staff Attorney to provide legal counsel to low-income seniors on a variety of elder law topics such as public benefits, estate planning, healthcare coverage, and disability matters.



Azba Hotelwala

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

Overview

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

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

Experience

BerryDunn (05/2022 – present)

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

WV Bureau for Medical Services (BMS)

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

As a consultant and deputy project manager, Azba has made significant contributions to the CCBHC team. Her support includes taking meeting notes,



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

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

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

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

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

WV Department of Health and Human Services (DoHS)

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

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

LaSalle Network (01/2022 – 05/2022)

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

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

Azba served as an Advocate for Community Engagement where her main role was to recruit



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

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

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

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

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

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

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



Dina Nash, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	7+ years
Certifications and Education:	Master of Public Health in Epidemiology and Biostatistics, Boston University Bachelor of Arts in Psychology, Harvard University

Overview

Dina is an experienced senior consultant who specializes in healthcare data analysis, claims, and clinical data. She has training in conflict communication, delegation, facilitation, and project management and has worked extensively with Statistical Analysis System (SAS) code, Structured Query Language (SQL) Code, Microsoft (MS) Excel, and Tableau. Additionally, Dina is a council member of BerryDunn's Diversity, Equity, and Inclusion Advisory (DEIBA) Council, and a member of the Systemic Barriers to DEIBA Subcommittee.

Experience

BerryDunn (09/2021 – present)

Dina serves as a senior consultant in BerryDunn's Health Analytics Practice Group (HAPG), working with clients on data analysis, claims analysis, and clinical data projects related to social services and Medicaid programs. Dina also works on mandated benefit reviews (estimating the financial impact of pending mandated benefit legislation), and health policy and regulatory analyses.

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

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

- *Child Welfare Initiatives Project (09/2021 – present)*

Dina supports the project management of a team of analysts supporting the DoHS Office of Quality Assurance for Children's Programs (OQA). She consistently organizes core team efforts and maintains regular communication with OQA, Bureau for Medical Services (BMS), Bureau for Behavioral Health (BBH), Bureau for Family Assistance (BFA), Bureaus of Social Services (BSS), and DoHS vendors, helping to ensure alignment with reporting and Continuous Quality Improvement (CQI) program needs. Dina's responsibilities include generating visualizations for monthly, quarterly, semi-annual, prototype, and ad-hoc/stop-gap reports to meet OQA's operational requirements. She also regularly reviews team members' work and verifies consistency and accuracy. Dina is also involved in prototyping new actionable and insightful visuals to enhance the clarity and effectiveness of the team's deliverables.

- *Mental Health Parity Project (01/2022 – present)*



Dina provides essential support for writing and research in mental health parity reports. She has also developed interactive and informative dashboards, along with trend charts, to visually present complex data related to mental health parity.

- **Massachusetts Center for Health Information and Analysis**

- *Data Analyst, Policy Analyst, and Project Manager (09/2021 – present)*

Dina works on mandated benefit reviews (MBRs). For these MBRs, Dina writes SAS code to query the Massachusetts All-Payer Claims Database (APCD), creates diagrams and visuals, and also supports medical efficacy research and writing of the report. More recently she led the Biomarker Testing MBR. MBRs include a medical efficacy analysis and an estimate on health insurance costs, typically over five years. MBRs Dina has worked on include:

- An Act Relative to Patient Access to (Cancer) Biomarker Testing (H1074/S689)
- An Act Relative to LGBTQ Family Building (S622): August 2023
- An Act Relative to Applied Behavioral Analysis Therapy (H1084/S617): August 2023
- An Act Providing Access to Full Spectrum Addiction Treatment Services (H2116/S1292): March 2023
- An Act Relative to Breast Cancer Equity and Early Detection (H4748/S2856): November 2022
- An Act Relative to Dual Diagnosis Treatment Coverage (H1147/S685): July 2022
- An Act to Update Mental Health Parity (H2065): July 2022
- An Act Relative to Collaborative Care (S769): March 2022

- **New Hampshire Insurance Department (NHID) (07/2023 – present)**

- *HealthCost Transparency Initiative*

Dina supports the HealthCost transparency initiative with the creation of interactive Tableau dashboards. She also supports project management, ensuring smooth coordination with the client and associated vendors.

- **Wisconsin Office of the Commissioner of Insurance (03/2022 – 10/2023)**

- *Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy Reports*

Dina played a crucial role in supporting research, writing, and data analysis for the Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy reports. Her contributions encompassed conducting in-depth research, synthesizing complex data, and crafting insightful analyses. Dina's expertise extended to developing visually engaging and



informative visualizations to facilitate understanding and decision-making in these critical areas of health insurance evaluation.

- **Maine Bureau of Insurance (ME BOI) (03/2022 – present)**

- *Non-Quantitative Treatment Limitations (NQTLs)*

Dina supports mental health parity by conducting NQTLs comparative analyses. She also supports the creation of mental health parity tools.

Mass General Brigham Enterprise Analytics (06/2018 – 07/2021)

Dina worked as a healthcare data analyst to develop SAS and SQL codes for metrics for a complex care program dashboard used by program and hospital leadership and for the Massachusetts Medicaid agency report submission. The complex care program was comprised of a diverse patient population. Dina conducted analyses on patients with Medicaid, Medicare, and commercial insurance. She also supported the patient centered medical home program with creation of advanced primary care strategy metrics, logic, and visuals, and assisted manager with supporting new analysts. She reviewed code written by other analysts. Dina conducted a Deferred Care Analysis due to COVID-19 epidemic that informed state and system wide decision-making and led to publication in American Journal of Managed Care. This Deferred Care Analysis was stratified by commercial payers, Medicaid, and Medicare, as well as by select social determinant of health variables.

Partners HealthCare Enterprise Analytics (08/2017 – 05/2018)

Dina worked as a program analytics intern covering system level population health program areas.

Partners HealthCare Center for Population Health (06/2017 – 08/2017)

Dina worked as a financial and clinical analytics intern to support the quality team by updating dashboard and exception reports using SAS and MS Excel. She conducted analysis in SAS on Generalized Anxiety Disorder Screening Measure and created pharmaceutical cost trend driver visuals. Dina also collaborated on healthcare services cost equivalency visual in PowerBI.



Alexandra (Alex) Glowacky, CAPM®

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

Overview

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

Experience

BerryDunn (07/2021 – present)

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

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

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

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

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

As the project manager for the SPRS project, Alex assists with the management



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

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

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

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

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

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

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

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

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

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

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



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

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

Cambridge Women's Center (Winter 2019)

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



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)**
 - *People's Access to Help (PATH) Project*
 - WV Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement (PERM) Reporting Year 2023 (RY2023) Phase II*
 - *Substance Use Disorder (SUD) 1115 Waiver Project Phase V*
 - *Data Improvement Project (DIP) Phase 3*
 - *DIP Phase 4*
 - *Public Health Emergency (PHE) Support Phase II*
 - *Medicaid Information Technology Architecture (MITA) AA-A Annual Update*



2021

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

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.

- o **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.



Hailey Holden

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

Overview

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

Experience

BerryDunn (07/2022 to present)

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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



Katie McDonald, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Paraprofessional
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	<p>Master of Business Administration, focus on Healthcare Administration, Marshall University</p> <p>Bachelor of Arts in Communication Studies, focus on Organizational Communication, Marshall University</p> <p>Project Management Institute (PMI) Certified Project Management Professional (PMP®) (<i>in progress</i>)</p>

Overview

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

Experience

BerryDunn (05/2022 – present)

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

WV Department of Human Services (DoHS)

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



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

WV Bureau for Medical Services (BMS)

- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance Annual Update Assistance Project (07/2023 – present)*
Katie assists with MITA lifecycle maintenance activities, including developing new business process improvement flows and updating MITA related reports.

- *Provider Enrollment (PEA) Project and Provider Management Support (08/2023 – 10/2023)*

Katie provided project coordinator assistance with planning, developing, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

- *Advance Planning Document (APD) Consulting Project (05/2023 – present)*
Katie provides project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

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

Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ, now in its fourth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

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

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



Cate Poling

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

Overview

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

Experience

BerryDunn (06/2021 – present)

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

- **State of WV**



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

- *Data Improvement Project Phase 4 (06/2023 – present)*
As a project manager, Cate assists with refining, expanding, and initiating the DIP systems development life cycle (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, reviewing meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate also assist with WV engagement hours and resource planning oversight within this role.
- *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (06/2023 – present)*

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

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

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

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

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

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



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

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

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

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

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

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

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

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

Cate was an associate providing remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries in person and via telephone and followed proper procedure for handling claims. Cate was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly



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

Highmark WV BCBS (10/2012 – 07/2014)

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

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

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

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

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

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

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



Kourtney Kirk

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff 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.

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

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

TEKSystems (08/2020 – 01/2022)

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

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

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

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

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

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



quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and also managed client relationships.

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

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

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

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



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

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

- **Missouri Department of Social Services (DSS)**
 - *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 – present)*



- *MME PMO Program Integrity (02/2019 – 01/2021)*
- *MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 – 02/2019)*

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

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



- *Dean (2012 – 2015)*

As a dean, Shandia managed the character education program and provided support to students, families, and faculty.

Hentges Tree Service (2013 – 2015)

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

Wells Fargo Home Mortgage (2012)

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



Alycia Minshall, MA

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

Overview

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

Experience

BerryDunn (8/2022 – present)

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

Alycia Minshall Editing Services (3/2014 – present)

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

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

○ Senior Editor (6/2020 – 8/2021)

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



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

- *Editor (4/2017 – 6/2020)*

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

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

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

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

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

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

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

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

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

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

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

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



Caitlin Cabral

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

Overview

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

Experience

BerryDunn (09/2021 – present)

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

QualityMetric (08/2020 – 09/2021)

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

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

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

True Colors, Inc. (01/2019 – 05/2019)

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in



and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

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

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



Carole Ann Guay

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

Overview

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

Experience

BerryDunn (10/2014 – present)

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

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



to assist in vendor selection.

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

Webber Energy Fuels (2004 – 2014)

As the office coordinator, Carole Ann oversaw several operations, including payroll for an office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of



previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.



Emily Hendrickson

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

Overview

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

Experience

BerryDunn (07/2017 – present)

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

Christianbook (06/2021 – present)

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

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



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

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

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

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

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

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

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

Civil Consultants (09/1999 – 07/2014)

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

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

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



Janine DiLorenzo

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

Overview

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

Experience

BerryDunn (01/2022 – present)

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

Breakwater School (08/2019 – 08/2021)

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

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

○ Program Coordinator (06/2014 – 06/2018)

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



operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.

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

Stonehill College (08/2010 – 05/2011)

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



Jon Williams

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

Overview

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

Experience

BerryDunn (02/2019 – present)

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

Freelance Proofreader and Copyeditor (11/2010 – present)

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

Midwest Tape (11/2004 – present)

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

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

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

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



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



Jordan Ramsey, MA, LSSGB

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

Overview

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

Experience

BerryDunn (07/2019 – present)

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

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



Portland Adult Education (2019)

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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

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

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

The Southern Illinoisan (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**
As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.
- **Hardin County, IL**
Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.
- **NOVA Group of Japan**
Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



Megan Hamilton, MA

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

Overview

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

Experience

BerryDunn (12/2022 – present)

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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



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

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

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

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



KD Dobyne

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

Overview

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

Experience

BerryDunn (09/2023 – present)

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

Qualtek Wireless (08/2022 – 09/2023)

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

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

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

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

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



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

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	On a monthly basis, BerryDunn will develop and deliver a Commissioner Briefing to BMS leadership. This briefing will include the status of project deliverables and timelines, as well as associated project issues and risks.
02	Monthly Status Report	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The status report will include the status of project deliverables and timelines, as well as associated project issues and risks.
03	Project Timeline	Schedule for the project.
04	Project Kickoff Deck	PowerPoint slide deck that will be used to outline key activities, goals, and milestones.
05	SPA Materials	A draft SPA and accompanying materials for CMS submission, as needed.
06	Implementation Plan	A plan that will display operational activities, systems engagement process steps, and other details that would support implementation of a new SPA or other Medicaid program.
07	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Central Master Agreement
CMS	Centers for Medicare & Medicaid Services
DAF	Deliverable Acceptance Form
DoHS	Department of Human Services
EM	Engagement Manager
FFY	Federal Fiscal Year
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
JIPS	Justice-Involved Program Support
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
PM	Project Management
SLA	Service-Level Agreement
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
State	West Virginia
UPI	Unique Project Identifiers
USVI	United States Virgin Islands

Keyword Search

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

Simple Search

Search Editor

- ☐ Any Words ⁱ
- ☐ All Words ⁱ
- ☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc"

x

Entity



Location



Status



- ☒ Active
- ☐ Inactive

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information			
Business Purpose	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Technical Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)		
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years		Par Value	

Authorized Shares	Young Entrepreneur	Not Specified

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

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

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

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

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

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