State of West Virginia
Delivery Order

Order Date: 05-31-2024

CORRECT ORDER NUMBER MUST APPEAR ON ALL PACKAGES, INVOICES, AND SHIPPING PAPERS. QUESTIONS CONCERNING THIS ORDER SHOULD BE DIRECTED TO THE DEPARTMENT CONTACT.

Order Number:	CDO 0511 2680 BMS2400000060 1	**Procurement Folder:**	1440971
Document Name:	Medicaid and Children's Health Insurance Program Enterprise	**Reason for Modification:**	
Document Description:	Medicaid and Children's Health Insurance Program Enterprise		
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

Vendor Customer Code: 000000100150
BERRY DUNN MCNEIL & PARKER LLC
2211 CONGRESS ST

PORTLAND   ME   04102

US

Vendor Contact Phone: 6813138905   **Extension:**

Discount Details:

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

DEPARTMENT CONTACT

Requestor Name: Lakendra R Burdette
Requestor Phone: 304-352-4319
Requestor Email: lakendra.burdette@wv.gov

24
FILE LOCATION _____

INVOICE TO

PROCUREMENT OFFICER: 304-352-4286
HEALTH AND HUMAN RESOURCES

BUREAU FOR MEDICAL SERVICES

350 CAPITOL ST, RM 251

CHARLESTON   WV 25301-3709

US

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

Total Order Amount:	$2,511,660.00

Purchasing Division's File Copy

CH 6/5/24
PURCHASING DIVISION AUTHORIZATION
DATE: 6/5/2024
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6-24-24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid and Children's Health Insurance Program Enterprise System Data Integration Hub Phase I

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

Total: $2,511,660.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$5,590.00
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

26 hours @ $215 = $5,590.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$7,020.00
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

26 hours @ $270 = $7,020.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$5,330.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2024-06-17	2025-06-14				

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

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

Hourly Rate: $205.00

26 hours @ $205 = $5,330.00

Line		Commodity Code	Quantity	Unit	Unit Price	Total Price
4		80101600	0.00000		$0.0000	$2,112,840.00
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

11,738 hours @ $180 = $2,112,840.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		$0.0000	$380,880.00
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

4,761 hours @ $80 = $380,880.00

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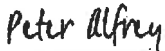May 31, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the West Virginia MCES Data Integration Hub Phase I project under our 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. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

DocuSigned by:

Peter Alfrey

2DAAA44ADB3A477...

Peter Alfrey
Principal
207-541-2242

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West Virginia Department of Human Services, Bureau for Medical Services

Medicaid and Children's Health Insurance Program Enterprise System Data Integration Hub Phase I

Staffing Plan and Scope of Work

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

WEST VIRGINIA DEPARTMENT OF
HUMAN SERVICES

Submitted by:

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

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

Peter Alfrey, PMP®, Principal
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Jennifer Elwood, FSA, MAAA, FCA, Principal
jelwood@berrydunn.com

Submitted On:
May 31, 2024

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Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS), Medicaid and Children's Health Insurance Program Enterprise System Data Integration Hub Phase I

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) with the initial planning, design, and development activities for the Medicaid and Children's Health Insurance Program Enterprise System (MCES) Data Integration Hub (Data Hub) Phase I Project. This SOW is henceforth referred to as the MCES Data Integration Hub SOW Phase I. The Data Hub is necessary to support the State's MCES modularity goals and objectives. The Data Hub aims to improve data quality, help ensure data integrity, enhance master data management, provide data and system autonomy, and become the system of record for the State. The Data Hub will help the State establish modularity by helping better integrate all State MCES modules and external data exchange partners.

This work will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) #HHR21*03 BMS Project Management Services contract between BerryDunn and DoHS.

1.0 Introduction

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

1.1 Key Information

The objective of this project is for the initial planning, design, and development of the modernized MCES Data Hub proof of concept for provider data and the MCES Provider Module, which will aim to:

- Provide BMS with a modern, secure, cloud-based Data Hub to support MCES modularity.

- Improve data quality and integrity.

- Enhance master data management.

- Improve State data and system autonomy.

- Coordinate requirements analysis sessions to confirm specifications and requirements for the MCES Data Hub.

- Launch a proof of concept of the Data Hub for provider data to be integrated with the future Provider MCES Module.

- Support the Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) by designing, developing, and implementing an MCES Data Hub and providing data integration and technology advisory services.

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

- Improve the State's effectiveness and efficiency.

- Improve operational efficiency and reduce costs in the healthcare system.

- Promote an environment that supports flexibility, adaptability, and rapid response to changes in programs and technology.

- Promote an enterprise view that supports enabling technologies that align with Medicaid business processes and technologies.

- Improve the management of member and provider data so that it is timely, accurate, usable, and easily accessible to support analysis and decision-making for healthcare management and program administration.

1.2   Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young as the BMS project sponsor and Brandon Lewis as the BMS project lead.

- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.

- The BerryDunn leadership team will consist of Nicole Becnel as the engagement manager (EM), Eduardo Daranyi as the lead project manager (LPM), Peter Alfrey as the portfolio manager, Jeff Stoddard as the program manager, and Danielle Joslyn as the project manager.

- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 13 months.

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State designated site and will be brought to the attention of the BMS project sponsor.

- State staff with the required knowledge base to support the Data Hub will attend project-related meetings. If these individuals are unavailable or do not participate in requisite sessions, the project schedule, scope, and cost may be impacted.

- The project team will have access to all necessary State and vendor data.

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

- BerryDunn and the State will explore strengthening WV partnerships with states and other territories [such as the United States Virgin Islands (USVI)] and leverage any needed tools and procedures when applicable.

1.3   Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advanced Planning Document (IAPD) (formerly the MITA Advance Planning Document [APD]) for this SOW. The Centers for Medicare & Medicaid Services (CMS) previously approved the MMIS IAPD on September 19, 2023, for total State and federal funds in the amount of $49,586,488, under project identifier WV-2023-07-31-MMIS-MITA-IAPDU. The estimated cost of services delivered under this SOW is $2,511,660 (included in the approved Advanced Planning Document (APD). Therefore, any additional scope added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.

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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	**Engagement Oversight** *Service Approach* BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members regularly to discuss project status and issues impacting the timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables. *Deliverable(s)* • Deliverable 1: Commissioner Briefing *Completion Criteria* All parties will deem Engagement Oversight complete upon project completion and formal acceptance of the Project Closeout Summary .	Nicole Becnel Ed Daranyi Jennifer Elwood Peter Alfrey Jeff Stoddard Danielle Joslyn Emily McCoy Dawn Webb	80
2.0	**Project Execution and Control** *Service Approach* BerryDunn will provide project management assistance to support the design, development, and implementation of the MCES Data Hub. In support of Project Execution and Control, BerryDunn leadership will meet with the project sponsor regularly to discuss project status and issues impacting the timely completion of the work and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include: • Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn-owned, State-owned, and vendor-owned meetings, as needed.	Peter Alfrey Jeff Stoddard Danielle Joslyn Cate Poling Dawn Webb Hailey Holden Alycia Minshall Caitlin Cabral Emily Hendrickson Janine DiLorenzo KD Dobyne Jonathan Williams Jordan Ramsey Megan Hamilton	1,640

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	• Preparing monthly project status updates, risks, issues, and briefings for the State leadership team.	Carole Ann Guay	
	• Managing project logs (action items, decisions, issues, and risk tracking).	Katie McDonald Cate Poling	
	• Storing project documentation repository in an agreed-upon SharePoint location.	Kourtney Kirk Shandia Benke	
	• Creating a Project Schedule for the MCES Data Hub.	Amber Davis	
	Deliverable(s)		
	• Deliverable 2: Monthly Status Report		
	• Deliverable 3: Project Schedule		
	Completion Criteria		
	Project Execution and Control will be completed upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DoHS project sponsor or their designee.		
3.0	**Research and Planning** *Service Approach* BerryDunn will conduct the following activities: • Review project documentation from existing, relevant projects such as MITA, Data Visioning, and Data Improvement. • Meet with and interview key State employees to gather information about the As-Is architecture where gaps exist. • Review existing Gainwell provider data specifications. • Analyze the current provider data. • Research other states' architectural diagrams. • Set up the Data Hub Jira® Project. • Set up Shared Documentation Repository containing research and planning documents. *Deliverable(s)* • Deliverable 4: Data Hub Component of the MCES To Be Architectural Diagram • Deliverable 5: Executive Summary of Data Hub's Purpose and Function in the MCES • Deliverable 6: Provider Data Hub Proof of	Peter Alfrey Jeff Stoddard Jim Strasenburgh Miles Isacke Lars Loren Marvin "Ed" Crawford Arisara Miller Fei Zou Dina Nash Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Danielle Joslyn Ryan Talmadge John Reilly Matthew Bria Mitch Darrow Sarah Vintorini	560

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	Concept Scope Document	Amber Davis	
	Completion Criteria	Megan Blount	
	Research and Planning will be completed upon successful completion and State acceptance of Deliverables 4 – 6 listed above.	Jorge Velez-Lopez Jonathan Watkins	
4.0	**Requirements and Design of the Data Hub** *Service Approach* BerryDunn will conduct the following activities: - Work with project team members and BMS key personnel to define the initial user stories and functional requirements of the Data Hub. - Develop a cloud infrastructure diagram showing the details of what cloud components and services will be utilized for the Data Hub. - Develop a Data Flow Diagram showing how provider data flows among the Legacy Provider system, the new Provider Module, the Data Hub, and other modules/consumers of provider data. - Develop an Entity Relationship Diagram (ERD) describing the provider Data Hub table designs. - Develop an Interface Specification document defining the data specification to be used by the Provider Module vendor. *Deliverable(s)* - Deliverable 7: User Stories and Functional Requirements Captured in Jira® - Deliverable 8: Cloud Infrastructure Diagram - Deliverable 9: Data Flow Diagram - Deliverable 10: Legacy and New Provider Module Source to Target Data Mapping Document - Deliverable 11: Data Hub ERD - Deliverable 12: Provider Interface Specifications (to/From Data Hub) *Completion Criteria* Requirements and Design of the Data Hub will be completed upon successful completion and State acceptance of Deliverables 7 – 12 listed above.	Peter Alfrey Jeff Stoddard Jim Strasenburgh Miles Isacke Lars Loren Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Danielle Joslyn Ryan Talmadge John Reilly Matthew Bria Mitch Darrow Sarah Vintorini Amber Davis Megan Blount Jorge Velez-Lopez Jonathan Watkins	1,540

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
5.0	**Cloud Infrastructure Build and Configuration** *Service Approach* BerryDunn will build and configure the cloud infrastructure necessary for the Data Hub pilot in the secure Amazon Web Services (AWS) GovCloud environment. All necessary cloud services will be set up, configured, and audited to help ensure a secure implementation. *Deliverable(s)* • Deliverable 13: Preliminary Security Audit Report *Completion Criteria* Cloud Infrastructure Build and Configuration will be completed when the cloud infrastructure has been sufficiently set up to begin developing the Data Hub and upon successful completion and State acceptance of Deliverables 13 listed above.	Jeff Stoddard Jim Strasenburgh Miles Isacke Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Mitch Darrow Matthew Bria Danielle Joslyn Ryan Talmadge John Reilly	1,535
6.0	**Development of the Data Hub** *Service Approach* BerryDunn will employ an Agile approach to software development for this project. All code developed will be committed to a cloud-based code repository the State will have access to. BerryDunn will conduct code reviews and until testing for all code developed. Unit tests will be automated whenever possible. Sprints will typically run between two to four weeks and include an end-of-sprint walkthrough with the State. All sprints and tasks within a sprint will be documented and managed within a Jira® project site the State will have access to. The State will be involved in all Sprint Planning, Review, and Retrospective meetings. These meetings will provide the State the ability to collaborate with BerryDunn on setting priority and direction of the development activities. *Deliverable(s)* • Deliverable 14: Unit Test Results Report With Each Sprint Completion • Deliverable 15: Sprint Overview Report/Release Notes *Completion Criteria* Development of the Data Hub will be completed when	Jeff Stoddard Jim Strasenburgh Miles Isacke Lars Loren Arisara Miller Fei Zou Dina Nash Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Danielle Joslyn Ryan Talmadge John Reilly	6,560

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	all user stories and functional requirements have been met and upon successful completion and State acceptance of Deliverables 14 and 15 listed above.		
7.0	**Testing of the Data Hub** *Service Approach* In parallel to the development of the Data Hub, BerryDunn will employ several testing techniques through the software development life cycle, including unit tests, integration tests, regression tests, testing with data partners, and security tests. *Deliverable(s)* • Deliverable 16: Test Approach Plan • Deliverable 17: Third-Party Security Validation Report *Completion Criteria* Testing will be completed when: • All unit, integration, and regression tests have passed. • Testing with the MCES Provider Module has passed. • Third-party security validation has passed. • Deliverables 16 and 17 listed above have been successfully completed and accepted by the State.	Jeff Stoddard Jim Strasenburgh Miles Isacke Lars Loren Marvin "Ed" Crawford Arisara Miller Fei Zou Dina Nash Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Danielle Joslyn Ryan Talmadge John Reilly Matthew Bria Mitch Darrow Sarah Vintorini Amber Davis Megan Blount Jorge Velez-Lopez Jonathan Watkins	3,380
8.0	**Organizational Change Management and Training** *Service Approach* Throughout the life cycle of the project, BerryDunn will facilitate frequent communications with the State, vendors, and other interested parties to help ensure a successful Data Hub implementation. The project team will use organization change management practices to help ensure the organization and its vendors are ready for the change and will provide training as needed. *Deliverable(s)* • Deliverable 18: Communication Plan	Peter Alfrey Jeff Stoddard Cate Poling Sarah Vintorini Amber Davis Megan Blount Jorge Velez-Lopez Jonathan Watkins	655

Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	• Deliverable 19: Training Plan • Deliverable 20: Change Management Plan • Deliverable 21: Readiness Checklist/Go/No-Go Decision *Completion Criteria* Organizational Change Management and Training will be completed upon successful completion and State acceptance of Deliverables 18 – 21 listed above.		
9.0	**Implementation of the Data Hub for Provider Data** *Service Approach* BerryDunn will conduct the following activities: • Implement the Data Hub provider pilot into a production cloud environment. • Operate the Data Hub production processes. • Maintain cloud environment and software, including applying regular updates and patches. • Monitor the cloud environment and Data Hub processes. • Communicate with the State and vendors when issues arise. • Collaborate with State vendors to resolve data and other issues. • Provide regular reporting to help ensure compliance with Service-Level Agreements (SLAs). *Deliverable(s)* • Deliverable 22: Operations Runbook • Deliverable 23: SLA Report • Deliverable 24: Operations and Support Plan • Deliverable 25: System Monitoring Plan *Completion Criteria* Implementation of the Data Hub for Provider Data will be completed upon: • Deploying a functional system that meets agreed-upon requirements to the production environment. • Exchanging provider data between necessary data partners.	Jeff Stoddard Jim Strasenburgh Miles Isacke Lars Loren Marvin "Ed" Crawford Arisara Miller Fei Zou Dina Nash Lloyd Butler Chris Fanikos Grady Black Emily Tan Adam Bowman Danielle Joslyn Ryan Talmadge John Reilly Matthew Bria Mitch Darrow Sarah Vintorini Amber Davis Megan Blount Jorge Velez-Lopez Jonathan Watkins	590

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Ref #	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	• Successful completion and State acceptance of Deliverables 22 – 25 above.		
10.0	**Project Closeout** BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at the project close. Additionally, the Project Closeout Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member. *Deliverable(s)* • Deliverable 26: Project Closeout Summary *Completion Criteria* BerryDunn services will be considered complete when the State project sponsor or their designee formally accepts and signs the Project Closeout Summary.	Peter Alfrey Danielle Joslyn Jeff Stoddard Megan Blount Jonathan Watkins	37
Total Hours			**16,577**
Total Not-To-Exceed Cost Estimate			**$2,511,660**

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3.0   Project Resources and Hours

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

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

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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	$270	Nicole Becnel	26	$7,020
8	LPM	$215	Eduardo Daranyi	26	$5,590
10	LMPM	$205	Emily McCoy	26	$5,330
11	GPM	$180	Peter Alfrey	192	$34,560
11	GPM	$180	Jennifer Elwood	26	$4,680
11	GPM	$180	Jeff Stoddard	720	$129,600
11	GPM	$180	Danielle Joslyn	1,200	$216,000
11	GPM	$180	Jim Strasenburgh	480	$86,400
11	GPM	$180	Lars Loren	360	$64,800
11	GPM	$180	Miles Isacke	1,200	$216,000
11	GPM	$180	Ryan Talmadge	1,920	$345,600
11	GPM	$180	Dawn Webb	1,920	$345,600
11	GPM	$180	Arisara Miller	240	$43,200
11	GPM	$180	Fei Zou	240	$43,200
11	GPM	$180	Lloyd Butler	720	$129,600
11	GPM	$180	Chris Fanikos	720	$129,600
11	GPM	$180	Adam Bowman	480	$86,400
11	GPM	$180	Marvin "Ed" Crawford	480	$86,400
11	GPM	$180	Mathew Bria	240	$43,200
11	GPM	$180	Mitch Darrow	240	$43,200
11	GPM	$180	Sarah Vintorini	240	$43,200
11	GPM	$180	Amber Davis	120	$21,600
12	SS	$80	Dina Nash	540	$43,200
12	SS	$80	Hailey Holden	61	$4,880
12	SS	$80	Megan Blount	480	$38,400
12	SS	$80	Emily Tan	960	$76,800
12	SS	$80	Grady Black	960	$76,800

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CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	$80	John Reilly	660	$52,800
12	SS	$80	Jorge Velez-Lopez	660	$52,800
12	SS	$80	Jonathan Watkins	240	$19,200
12	SS	$80	Alycia Minshall	7	$560
12	SS	$80	Caitlin Cabral	7	$560
12	SS	$80	Emily Hendrickson	7	$560
12	SS	$80	Janine DiLorenzo	7	$560
12	SS	$80	Jonathan "Jon" Williams	7	$560
12	SS	$80	Jordan Ramsey	13	$1,040
12	SS	$80	Megan Hamilton	7	$560
12	SS	$80	Carole Ann Guay	7	$560
12	SS	$80	KD Dobyne	7	$560
12	SS	$80	Katie McDonald	59	$4,720
12	SS	$80	Cate Poling	24	$1,920
12	SS	$80	Kourtney Kirk	24	$1,920
12	SS	$80	Shandia Benke	24	$1,920
Total				**16,577**	**$2,511,660**

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4.0   Project Hours and Costs Per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project.
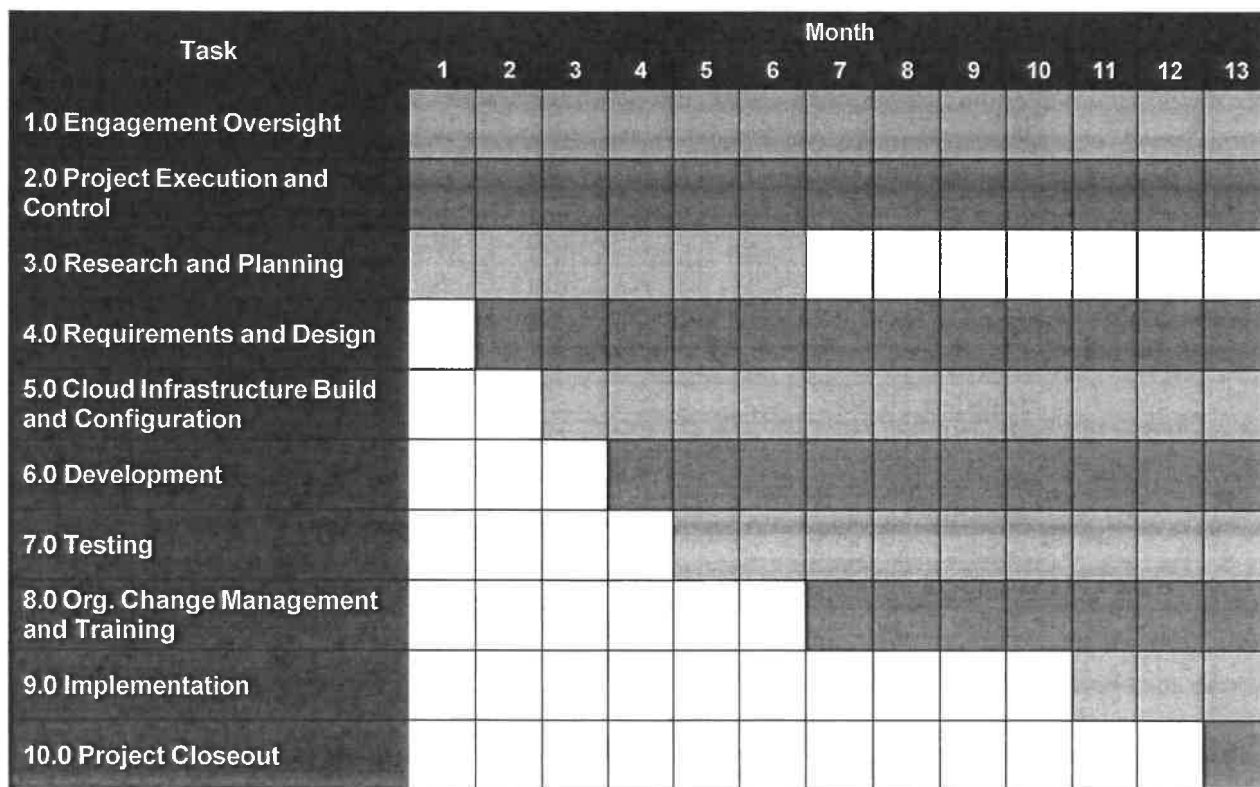
Table 3: Estimated Project Costs by Month

Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	2	2	2	904	365	1275	$193,300
Month 2	2	2	2	912	368	1286	$194,980
Month 3	2	2	2	912	370	1288	$195,140
Month 4	2	2	2	911	368	1285	$194,800
Month 5	2	2	2	911	370	1287	$194,960
Month 6	2	2	2	911	368	1285	$194,800
Month 7	2	2	2	911	370	1287	$194,960
Month 8	2	2	2	911	368	1285	$194,800
Month 9	2	2	2	911	370	1287	$194,960
Month 10	2	2	2	911	367	1284	$194,720
Month 11	2	2	2	905	365	1276	$193,480
Month 12	2	2	2	883	360	1249	$189,120
Month 13	2	2	2	845	352	1203	$181,640
Total	**26**	**26**	**26**	**11,738**	**4,761**	**16,577**	**$2,511,660**

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5.0   High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	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 Research and Planning	■	■	■	■	■	■							
4.0 Requirements and Design		■	■	■	■	■	■	■	■	■	■	■	■
5.0 Cloud Infrastructure Build and Configuration			■	■	■	■	■	■	■	■	■	■	■
6.0 Development				■	■	■	■	■	■	■	■	■	■
7.0 Testing					■	■	■	■	■	■	■	■	■
8.0 Org. Change Management and Training							■	■	■	■	■	■	■
9.0 Implementation											■	■	■
10.0 Project Closeout													■

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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

2DAAA44ADB3A477

Signature

5/31/2024

Date

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

Signature

5/31/24

Date

b BerryDunn

Appendix A: Resumes

Nicole Becnel, PMP®

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

Overview

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

Experience
BerryDunn (06/2010 – present)

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

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

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

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

WV Department of Human Services (DoHS)

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – present)*
  Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementation of a fully compliant 837 encounter data process with the State's Fiscal Agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*
  Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*
  Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHs's programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees Statements of Work (SOWs), deliverables, and risk and issue management.

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

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

o *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of $37 million in federal relief funding for public health initiatives related to COVID-19.

o *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 – 06/2020)*
Nicole was the Lead Project Manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC) and adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

o *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 – 10/2020)*
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored

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

o *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 – 09/2020)*
Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add CHIP to the program. BerryDunn assisted the State with developing an RFP to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over $5 billion and promoted increased quality of care and health outcomes as well as data quality and efficiency for the State's managed care populations.

o *Provider Management Support (07/2019 – 01/2021)*
Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.

o *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 Waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

o *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and

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

- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 – 09/2013)*
  Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.

- *Provider Enrollment (PEA) Project (07/2011 – 12/2012)*
  Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities, including presentations and training at Provider Workshops held throughout the State.

- *5010 Refresh Project (10/2011 – 08/2013)*
  Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of Health Insurance Portability and Accountability Act (HIPAA) Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, subject matter expert (SME) advisory services, UAT planning assistance, operational readiness assessment assistance, and post-implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 – 06/2011)*
  Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

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

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

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

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

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

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

Presentations

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

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

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Eduardo "Ed" Daranyi, MEd, PMP®

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

Overview

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

Experience

BerryDunn (09/2005 – present)

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

- **State of West Virginia (WV)**
  WV Bureau for Medical Services (BMS)
  - *Engagement Manager (2012 – present)*
    In his role as Engagement Manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects. Ed joined the West Virginia project on a full-time basis in 2012 and has held many roles, including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Ed has not only provided engagement oversight for projects listed below but has also played an active project support role for a multitude of WV projects and initiatives.
    - *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 –*

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05/2021)

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

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

- ICD-10 Compliance
- Eligibility and Enrollment (E&E) Systems Modernization
- Adult Quality Measures
- Centers for Medicare & Medicaid Services (CMS) Advance Planning Development
- Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment
- Childrens Health Insurance Program (CHIP) Implementation and Stabilization
- Access to Care Planning and Monitoring
- Provider Re-enrollment
- Asset Verification System Procurement

- *West Virginia (WV) CHIP Operational Readiness Review (2019 – present)*
  Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three managed care organizations (MCOs) selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 present)*
  Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the Fiscal Agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supported technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
  As Engagement Manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health

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

- o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 – present)*
  Ed has been the Engagement Manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DoHS goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- o *Data Visioning and Warehouse Development and Procurement Assistance (2012 – present)*
  Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the DW/DSS, develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DoHS databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DoHS in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DoHS.

- o *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*
  Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed

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

WV Department of Human Services (DoHS)

○ *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.

b BerryDunn

Emily E. McCoy, RN, BSN, PMP®

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

Overview

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

Experience

BerryDunn (07/2016 – present)

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

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

   WV Department of Human Services (DoHS)

   o *Eligibility and Enrollment Implementation Assistance (01/2018 – present)*
   Emily is currently the Deputy Project Manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily can combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

   o *Public Health Emergency (PHE) (10/2021 – 7/2022)*
   Emily served as a subject matter expert (SME) for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with

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

- o *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*
  Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.

- o *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*
  Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

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

  - o *MMIS Modernization (7/2022 – 12/2023)*
    Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.

  - o *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*
    Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.

- **Henrico County, VA**

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

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

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

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

- Interpreting regulatory policy to determine impacts to the MMIS and other systems

- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement

- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.0, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)

- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements

- Participating in the development and review of the MMIS RFP

- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS

- Oversight and Management of the Adult Medicaid Quality Grant

- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

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

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

- *Medicaid Management Information system (MMIS) (01/2007 – 10/2013)*
  Emily served as the manager of operations with the MMIS for WV with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including long-term care and hospice services.

- *Office of Behavioral and Alternative Health Care (01/2005 – 12/2006)*
  Emily served as Program Manager of the State Medicaid Long-Term Care Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, Pre-Admission Screening and Resident Review (PASRR Level II), and Nurse Aide Training

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

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

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

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

  - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.

  - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.

  - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.

- **Neuroscience Unit (01/1998 – 05/1999)**

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

  - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care

  - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations

  - Serving as a representative on the Standards and Practice Council and Procedures sub-committee

  - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor

- o 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.

b) BerryDunn

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

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

Overview

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

Experience

BerryDunn (03/2014 – present)

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

- **State of WV**

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

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

b) BerryDunn

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

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

- **Washington Health Care Authority (HCA)**
  - Public Health Emergency Unwind Project (03/2023 – 12/2023)

    Peter served as Engagement Manager for the project, helping support the HCA's PHE unwinding efforts by overseeing the BerryDunn project team's project

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

- **New Jersey Division of Medical Assistance and Health Services**
  - o *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)**
  - o *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)**
  - o *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.

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Jennifer Elwood, MS, FSA, MAAA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal and Consulting Actuary
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Master of Science in Statistics, University of Connecticut
	Bachelor of Science in Mathematics – Statistics and Psychology, University of Connecticut
	Fellow, Society of Actuaries (FSA)
	Member, American Academy of Actuaries (MAAA)
	Fellow, Conference of Consulting Actuaries (FCA)

Overview

Jennifer has 25 years of experience as a healthcare actuary across a wide range of actuarial functions. Her experience includes projecting population cost experience and risk for pricing and risk-sharing, especially in new initiatives, including extensive work related to implementing the Affordable Care Act in commercial insurance, and projecting the state-level impact of expanding the Medicaid population. She also has experience analyzing risk-sharing arrangements, performing claim liability analysis, rate development, budget development, and financial monitoring. In addition, Jennifer co-leads the Data subgroup on the American Academy of Actuaries' Health Equity Committee.

Experience

BerryDunn (formerly Compass Health Analytics) (08/2014 – present)

As a principal and leader of BerryDunn's Health Analytics practice group, Jennifer is responsible for managing the Data Management and Strategy, Health Policy, and Actuarial practices. As an actuary, Jennifer assists nonprofit managed care organizations with claim liability analysis, rate development, budget development, and financial monitoring. She works with her clients to develop large employer claims projections, estimate the impact of proposed benefit mandates for state government policy makers, and assist state regulators with market conduct rate review audits.

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

  WV Bureau for Medical Services (BMS)

  - *Technical Assistance and Project Support (TAPS) Phase IV (05/2022 – present)* As a subject matter expert (SME), Jennifer has contributed knowledge and analysis to task requests. Jennifer also coordinates and leads particular 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 that requires financial knowledge.
  - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2021 – present)*

Jennifer provides subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its SUD Waiver initiatives.

o *Data Improvement Project (05/2023 – present)*

Jennifer provides subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

o *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (05/2021 – 02/2022)*

Jennifer provided subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

o *Access to Care Project Monitoring Phase (04/2018 – 04/2021)*

o Jennifer provided subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Access to Care initiatives.

- **Community HealthChoices**
  - o *Actuarial Services including rate review, valuation, and forecasting (2019 – present)*
    Jennifer provides consultative actuarial services to a large MLTSS managed Medicaid organization. These services include actuarial liability valuations, rate offer assessments, forecasting, strategic consulting, and ad hoc analyses.

- **Massachusetts Center for Health Information and Analysis**
  - o *Mandated Benefit Reviews (2011 – present)*
    Jennifer is the lead actuary on mandated benefit review projects (from 2015 – present). The actuarial component of the mandate review estimates the impacts to insurance premiums of proposed insurance mandate bills before the Massachusetts legislature. In addition, statutory and clinical analysis are provided by BerryDunn as part of the report.

- **Community Care Behavioral Health**
  - o *Actuarial Services including rate review/pricing, valuation, and forecasting (2008 – present)*
    Jennifer is one of three actuaries providing actuarial services to a large behavioral health managed Medicaid organization. These services, which she began providing in 2015, include actuarial liability valuations, capitation rate proposals, rate offer assessments and negotiations, forecasting, and ad hoc analyses.

WellPoint, Inc. (1998 – 2014)

Jennifer served in several roles of increasing responsibility during her 16-year tenure with WellPoint:

- **Northeast Regional Pricing Director (2012 – 2014)**

Responsible for individual and commercial pricing function in Connecticut, Maine, and New Hampshire, managing a team of three state pricing directors and seven analysts; coordinated rate development and preparation of rate filings and certifications for individual and commercial business; collaborated with state and regional leadership to achieve profitability and membership goals; provided strategic guidance to state pricing directors and helped to ensure corporate directives were met while balancing state objectives.

- **Northeast Regional Lead and Connecticut Pricing Director (2010 – 2012)**
  Responsible for commercial pricing function in Connecticut and managing a pool of seven analysts supporting the pricing needs of Connecticut, Maine, and New Hampshire; supported the Connecticut State President as a strategic business partner and primary actuarial point of contact for internal and external constituents; participated in quarterly forecast and annual planning process; served as the actuarial representative for ongoing Connecticut Exchange Board and Department of Insurance meetings with health insurance carriers.

- **Northeast Valuation Director (2008 – 2010)**
  Responsible for the valuation function in Connecticut, Maine, and New Hampshire; managed staff of eight associates responsible for estimating claim liabilities and other reserves for commercial, consumer, and FEP business; directed development of statutory and GAAP reporting, including support of actuarial certification and SOX control testing and certifications; coordinated actuarial portion of external audits and supported DOI audits.

- **Northeast Forecasting Director (2006 – 2008)**
  Responsible for forecasting commercial and individual business in Connecticut, Maine, and New Hampshire; managed staff of five associates responsible for developing the annual budget, quarterly forecasts, and detailed monthly variance analysis; acted in a peer review capacity by fully developing all assumptions and reconciling them with ongoing pricing and valuation development.

- **Connecticut and New York Forecast Lead (2001 – 2006)**
  Developed the annual budget and quarterly forecasts for the Connecticut Commercial Business and Anthem Health and Life of New York; provided key financial information to executive management through forecast modeling and analysis of monthly results; developed and enhanced forecasting models to increase speed and accuracy of forecast process.

Jeff Stoddard, CCP®

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

Overview

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

Experience

BerryDunn (12/2019 – Present)

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

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

  WV Bureau for Medical Services (BMS)

  o *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 – present)*
  Jeff provides technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

  o *Data Improvement Project (12/2019 – present)*
  Jeff provides technical leadership and analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

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- o *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*
  Jeff provided technical leadership and business analysis support to the Department of Health and Human Resources (DHHR) for the implementation of the State's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

West Virginia Department of Human Services (DoHS)

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

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

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

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

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

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

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

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

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

- **Development and Implementation of a More Robust Information Security Program**
  Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.

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Arcadia Solutions (04/2012 – 07/2013)

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

Health Dialog (09/2004 – 04/2012)

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

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Danielle Joslyn, PMP®

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

Overview

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

Experience

BerryDunn (11/2021 – present)

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

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

  WV Bureau for Medical Services (BMS)

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

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

  WV Department of Human Services (DoHS)

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

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

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

- **Arizona Healthcare Cost Containment System (AHCCCS)**
  - ○ *Forensic Accounting and Auditing (04/2023 – present)*
    Danielle leads the claim data analysis and creates reports to support the claims analyst in review of provider reimbursement and billing practices in its Medicaid program.

- **Colorado Office of State Auditor (OSA)**
  - ○ *Recovery Audit Contract (RAC) Examination (08/2023 to present)*
    Danielle provides analytic support for the Colorado OSA Recovery Audit Contract project. She participates in the business analysis and requirement gathering to support claims analysis.

Cotiviti (10/2016 – 11/2021)

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

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

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

RxAnte (09/2015 – 09/2016)

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

Cotiviti/Connolly/iHealth Technologies (01/2012 – 09/2015)

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

Health Dialog (02/2007 – 01/2012)

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

b)) BerryDunn

Jim Strasenburgh

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

Overview

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

Experience

BerryDunn (02/2013 – present)

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

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

  WV Department of Human Services (DoHS)

  - *Enterprise Data Services and Data Source Program (01/2020 – present)*
    As a technical subject matter expert (SME), Jim concentrates on data governance for this large initiative and serves as an integration point between the People's Access to Help (PATH) program data services and enterprise data services.

  - *People's Access to Help (PATH)/Integrated Eligibility System (IES) Program (10/2019 – present)*
    Jim is a member of the State Program Management Office, serving on the Document Review Team. As a team member, Jim reviews all program artifacts, with a focus on operations, architecture, performance testing, and data governance components for the program.

- **Massachusetts HIX/IES Entities**

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

- **Maryland Health Benefit Exchange**

BerryDunn

- o *IV&V for Maryland's HBE Implementation (02/2013 – 04/2014)*
  As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

- **Missouri Department of Social Services**
  - o *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services*
    Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM®'s systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

MetroSource, Corp. (1995 – 2012)

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

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

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

Xerox (05/2008 – 06/2009)

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

NYFIX, Inc. (01/2000 – 07/2006)

As Vice President for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including

management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.

b BerryDunn

Lars Loren, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	22 years
Certifications and Education:	Juris Doctor, Stanford University Bachelor of Arts in Physics, Dartmouth College

Overview

Lars is a member of BerryDunn's Health Analytics Practice Group and former leader of its Data Management Practice, contributing to diverse projects, many of which involve health insurance claim data for commercial and Medicaid populations. These projects include data quality control and analysis of All Payer Claims Databases (APCDs) for state government clients, as well as architecture, development, and analysis of data warehouses and analysis systems for state Medicaid programs, provider-sponsored ACOs, and nonprofit insurers including Medicaid Managed Care Oganizations (MCOs). He has a wide breadth of experience in process analysis and reporting and decision support systems. He has participated in all aspects of this work, from hands-on analysis and design to consultation with senior managers on system selection and organizational development.

Experience

BerryDunn (06/2003 – present)

As former director of analytics at BerryDunn and the firm it acquired, Compass Health Analytics, Lars analyzes MCO operational and financial planning business processes and consults with MCOs and state Medicaid entities on decision support organization, strategy, architecture, and data design. His experience includes:

- More than 18 years working with Medicaid enterprise data structure and content, often when consulting with Medicaid MCOs, and always accounting for state Medicaid data sources and rules in system architecture and design
- Providing project management and supporting analysis for procurement of claim processing systems for Medicaid MCOs
- More than four years assisting with decision support system architecture and data design through cross-bureau meetings with Bureau for Medical Services, Bureau for Behavioral Health, and Bureau for Social Services related to child welfare initiatives in West Virginia
- Managing a broad range of general research and analytical projects and providing analytical input, such as analysis of legislative intent and the impact of mandated insurance coverage on premiums

ISDM, Inc. (12/1997 – 06/2003)

As a consultant in a small firm with a national practice focused on marketing and CRM systems, IT planning, and process improvement, Lars worked across various projects as an analyst, project manager, and systems and data architect. Among other projects, he managed a project to implement CRM software for a mid-sized investment banking firm and evaluated and recommended changes in a demand forecasting process.

Other Experience

For Advanta Corporation, Lars served as an internal consultant managing project planning and justification to redesign the customer acquisition database and process.

As part of the Maine Legislative Finance Office and the legislative committee staff that reviewed state programs for usefulness, efficiency, and compliance with law, Lars reviewed healthcare profession regulatory agencies and others, facilitated the deliberations of legislative committees, and drafted legislation.

Miles Isacke

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	10
Certifications and Education:	Bachelor of Arts in Mathematics, Bates College

Overview

As a technical manager, Miles focuses on the design and implementation of decision support tools – from enterprise data warehouse solutions to custom reporting tools. He works with clients to understand business, data, and infrastructure requirements. He leads development projects for data warehouse solutions and other client decision support tools responsible for the data quality, testing, and efficacy of various client-facing solutions.

Miles' other skills include programming and analytical support; constructing, testing, and implementing reporting tools; constructing systems and procedures to assure the quality of data processing output; and performing quantitative analysis. Miles has expertise in utilizing cloud-based technologies.

Miles has programming expertise in SQL, PL/SQL, T-SQL, SAS, Visual Basic, Python, and Microsoft Office. Experience with Azure and AWS cloud environments.

Experience

BerryDunn (formerly Compass Health Analytics) (2013 – present)

- **Medicaid Behavioral Health Managed Care Organization (MCO)**

  - *Data Warehouse and Decision Consulting Services (09/2013 – present)*
    Miles has served as the primary analyst, advisor, and architect for data warehouse planning and decision support tool implementation for the Behavioral Health Medicaid MCO. The work focuses on gathering client requirements, designing, building, and maintaining the data warehouse and broad decision support systems at Community Care Behavioral Health.

  - *Organizational Design (OD) and Business Process Redesign (1/2022 – 3/2023)*
    Miles was part of a BerryDunn OD team that partnered with the client on a redesign of their organizational structure, development of senior leaders, and performing associated activities. In support of these business process redesign activities, the BerryDunn team provided a series of process development workshops and used instructional design methods to help the client develop and deliver improved business processes. BerryDunn also provided the client with Organizational Change Management (OCM) (including communications development and coaching) and project

b BerryDunn

management support throughout the project.

- **Missouri Department of Mental Health**

  o *EHR Business Planning (10/2021 – 04/2022)*
    Miles served as strategic data advisor for the procurement of a new
    Electronic Health Record (her). With the project required working with
    client stakeholders to construct current-state documentation and build out
    future-state requirements. Miles helped develop strategic
    recommendations to meet project goals and avoid unforeseen risks in the
    implementation and integration of a new EHR product.

- **Health Insurer and Exchange Participant**

  o *Operational Data Hub Architecture (01/2019 – 02/2021)*
    Miles served as the primary data architect for the implementation of a
    comprehensive data hub for the client organization. The project required
    meeting with interested parties from all key business units to gather data
    and reporting requirements. Miles produced detailed requirements
    documentation as well as data models and source-to-target maps.

b) BerryDunn

Ryan Talmadge

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert
Years of Experience Relevant to Proposed Role:	8+ years
Certifications and Education:	Southern Maine Community College, Cloud Architectures

Overview

Ryan is a motivated subject matter expert (SME) with more than 8 years of relevant healthcare and technical experience. For more than 3 years, he supported Maine's Medicaid program (MaineCare) with submitting Medicaid Statistical Information Systems (MSIS) extract data to Centers for Medicare & Medicaid Services (CMS). He specializes in healthcare and public sector systems, data and reporting, design and deployment of infrastructure and applications, IT management and oversight, IT project management, and identity and access management (IAM), OAuth, IDP utilizing Okta for on-premises and Cloud solution stacks. Ryan's deep knowledge has allowed him to provide critical support to Medicaid healthcare system projects as it relates to Centers for Medicare & Medicaid Services (CMS) reporting, Medicaid Budgeting and Expenditure Systems (MBES), MSIS managements, and EPIC Electronic Medical Record (EMR) systems.

Experience

BerryDunn (03/2024 – present)

Ryan is a Cloud engineering SME for BerryDunn's Health Analytics Practice Group (HAPG), bringing five years of experience supporting healthcare systems with a focus on Medicaid, four years of experience in design and deployment of infrastructure and applications, two years of experience in IT management and oversight, and five years of experience in IT project management to the projects he supports.

Arkatechture (03/2024 – present)

As a healthcare Cloud data engineer, Ryan is responsible for architecting, developing, and optimizing publish/subscribe messaging and data exchange systems with a specific focus on Amazon Web Services (AWS). Ryan also collaborated with cross-functional teams to design and implement robust publish/subscribe solutions that leverage a bi-directional data exchange architecture using services such as AWS messaging services, Apache Kafka (MSK), and other FedRamp-authorized Cloud service offerings along with industry-standard protocols, enabling efficient and near real-time data exchange using a hub-and-spoke framework within the software ecosystem.

Tyler Technologies (07/2022 – 03/2024)

Ryan worked as a deployment engineer responsible for technical software engineer for application ownership and deployment of products and services, including IAM oAuth Solutions and Cloud based Access Management Applications to Public Sector Clients in the United States, Canada, and the Philippines. He dealt with technical product deployments and troubleshooting of both Cloud native and local.net, html, and Java applications. He acted as a Technical Consultant Resource, assisting with operating local IT infrastructure for these cities, as well as configuring, operating, and deploying both local and Cloud hosted solutions in AWS and locally hosted in the company operated data center. Ryan acted as an escalation contact for lower tiers of support as well as an expert resource for all Tyler hosted Cloud native applications, as well as Tyler's oAuth Identity & Access Management Application.

Ryan split his time between scheduled client deployments and engagements, project management, reporting and client education meetings, technical documentation writing, managing escalation ticket queues and mentoring/training in an enterprise level company. Ryan was responsible for day-to-day hands-on-experience with Okta, Azure, Google Cloud Platform, Active Directory Federation Services (ADFS & AD), Enterprise Resource Planning (ERP) Software Suites for public sector city management, SQL, VMware, Microsoft Structured Query Language (SQL) Server, Internet Information Services (IIS), SQL Server Management Studio (SSMS) Reporting,.net, Apache, PowerShell Scripting, Windows Server Installation and hardening, Octopus Tentacle Deployment Tools, Confluence, Microsoft Dynamics, Power BI, Office 365 Suite, Postman, API Calls, and tens of dozens of other applications. Environments are almost exclusively Windows 2016 or later. He had advanced networking experience, involving configuring client environments to take external web data and securely transmit it both internally to the client site and to the clients' Cloud hosted off-site environment for the sake of issue bank payment information, all according to PCI DSS Regulations and secure payment information data transfers. Ryan was responsible for security application configuration to allow API Traffic through a complex multi-layered secure network and also federated, configured, and troubleshot identity providers to work with Okta as an Identity Storefront.

Auburn Savings Bank (06/2021 – 06/2022)

As a manager of IT Operations, Ryan was responsible for overseeing the IT environment, including administering day-to-day technology, operations, security and resilience. He also managed capacity, performance, and availability of infrastructure components in a financial setting. He reported directly to the Board. He managed all vendor relationships and prepared and presented IT Audit documentation to examiners and the Board. He introduced a culture of security and redundancy to the institution and was responsible for organizations' Business Continuity Management Planning (BCMP), including risk assessment, IT risk assessment, strategy and plan development, the business continuity plan, incident response policy, disaster recovery plan, crisis management, and

staff training program for IT and enterprise wide to exceed Federal Financial Institutions Examination Council (FFIEC) guidelines. Ryan created up-to-date business impact analysis and risk analysis and created security awareness program to meet audit guidelines, including

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securing funding, approval, vendor selection, and the technical implementation such as Group Policy Object (GPO) creation, network allow-listing, DNS allow-listing, and security configuration. He created and managed all IT policies, reported to the Board on all things IT, including staffing, cyber security events, data usage, budget, and initiatives. Ryan was responsible for interviewing and onboarding new IT staff. He also handled all identity access management for the company. He was responsible for SARS report investigations for technology systems and assisted with day-to-day operations as needed, including escalations, deployments, and projects.

Maximum Healthcare (04/2021 – 06/2021)

As a site supervisor in the COVID-19 clinic, Ryan accepted a temporary position with an immediate need to fix critical operational issues to help ensure a local vaccination clinic could continue to service the state population. He was responsible for a massive Covid-19 vaccination clinic, servicing thousands of Mainers daily. As a state mandated medical provider, he was responsible for staffing, patient care, and notification to the public. As head of the clinic, Ryan was responsible for team huddles, operational procedure, best practices, and safety and security. In his first month, he changed practices and policies to help better ensure patient safety by requesting that the Centers for Disease Control and Prevention (CDC) allow Maximum Healthcare to utilize the National Guard for security. He also established practices around how we managed Public Health Information (PHI) Data, to help ensure Maximum Healthcare removed the issue of PHI data being openly visible to the public. In his second month, he built a management team to off-load responsibilities from two staff members to six, helping ensure operational excellence. In his final month as vaccination traffic began to rapidly decline, Maximum Healthcare de-scaled the operation to just a handful of staff and volunteers. Ryan on-boarded and transferred duties to a CDC employee to oversee the clinic's last leg of the journey, finalized reports going back to the start of the clinic six months prior.

Covenant Health (03/2018 – 04/2021)

During his 3+ year tenure with Covenant Health, Ryan held a key role in supporting Medicaid and CMS program reporting. He worked closely with Medicaid agencies and CMS to deliver accurate MSIS data sets. He was responsible for reconciling inaccurate patient charts–such as inaccurate or out of date charts, erroneous coding reports, or inability to pull MBES reports. Ryan supported Maine's Medicaid program (MaineCare) by guiding Medicaid analysts in submitting claims and provider enrollment forms to the Maine Department of Health and Human Services (DHHS). He attended train-the-trainer classes to assist MaineCare analysts with this task and participated in calls between health systems and the state agency regarding changes and updates to processes and forms.

In his time with Covenant Health, Ryan held the following positions:

- **Technical Specialist II (02/2020 – 04/2021)**

    In this role, Ryan worked heavily with CMS, Medicaid agencies, and MSIS data sets, fielding questions and assisting departments with Claim Inpatient Reporting (CIP) for

b) BerryDunn

hospitals' managed care records; Claim Other (CO) outpatient financial and payment transactions; and Provider Enrollment (PRV) enrollment, attributes, and licensing. He also assisted application analysts with directing department staff on rectifying mismatched or missing Medicaid data, a task which included directing staff on how to pull reports and upload data into EPIC; training staff on how to identify out of date information by comparison; and assisting with educating staff on how to contact CMS for reporting issues without of date forms.

Within this role, Ryan also handled At-The-Elbow Medical Provider support for data mismatch and application configuration related to Medicaid Data and Reports in the Medical Record System; informing and enforcing of Medicaid and Children's Health Insurance Plan (CHIP) Payment and Access Commission (MACPAC) payment processing submissions deadlines to department staff at the direction of the Application Analyst; and EPIC EMR configuration, support, and change management. Ryan also served as a direct point of escalation for Medicaid-related tickets from the Service Desk.

This role also included a variety of IT systems management responsibilities, including reviewing, analyzing, and configuring end-user workstations, participating in routine work requests, and acting as a communication bridge between technical and medical staff.

- **Service Desk Analyst III (03/2018 – 02/2020)**

  In this role, Ryan assisted with and supported management of critical Medicaid reports. He assisted analysts with training teams to properly file reports on program costs and expenses to CMS and the State related to CMS-64 Quarterly Medicaid Statements of Expenditures. He also examined use of statistical data within the CMS-64 related to Medicaid's share of CHIP expenditures for a given quarter and created submissions through the web portal and as hard copies. He assisted with ensuring proper reporting of CHIP insurance with CMS-21 Quarterly CHIP Expenditures Reports, especially as it pertains to Behavioral Health and Adolescent Departments in EPIC. He also helped to set best practices for accounting for grant funds, helped to train the team on data extraction, and handled reconciling mismatches. Ryan assisted and educated the billing department with submitting financial and expense reports related to CMS-37 Medicaid Program Budget Reports.

Carbonite (08/2015 – 03/2018)

Ryan worked as a system administrator responsible to work with IT and infrastructure teams to build an end-to-end backup and data encryption plan that met their data needs. He configured servers and network attached storage (NAS) devices for an encompassing backup solution. Ryan set up and configured SQL and NoSQL Databases for off-site Cloud backup. He also held in person classroom hours for Windows System Administration, taught by Microsoft.

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

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

Overview

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

Experience

BerryDunn (08/2017 – present)

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

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

  WV Bureau for Medical Services (BMS)

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

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

    ▪ *APD Consulting Services (05/2023 – present)*

- *Partnership Management Support (December 2023 – present)*
  - *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.

- o *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*
  Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.

- o *TPL Procurement (05/2019 – 03/2022)*
  Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.

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

  - o *Recovery Audit Contractor (RAC) (09/2023 – present)*
    As the Medicaid Manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist the Government Assurance Practice Group (GAPG) within BerryDunn in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF) – the Colorado SMA, and the HCPF RAC vendor to gather information and address the findings of the evaluation.

- **United States Virgin Islands (USVI)**

  - o *Project Management and APD Support (10/2022 – present)*
    Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.

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

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

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

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

b BerryDunn

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

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

Unisys (06/2004 – 11/2009)

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

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

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

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

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

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

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

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

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

Acordia National (12/1994 – 05/1996)

Dawn began her career as a medical claim examiner.

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Arisara Miller, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Science in Economics, Oklahoma State University
	Bachelor of Science in Business Administration – Economics (Quantitative Statistics Studies), Oklahoma State University

Overview

Arisara is an experienced healthcare data analyst with over two decades of experience collaborating with healthcare institutions and insurance agencies. Her expertise spans claim-based algorithms for quality-improvement and cost-saving programs, data management, and data visualization.

Experience

BerryDunn (06/2018 – present)

Arisara serves as part of BerryDunn's Health Analytics Practice Area as a manager, focusing on data analytics engagements with healthcare clients across the country. She conducts quantitative research and assists on various projects to estimate market impacts of potential health system mergers, health policy changes, and state legislatures' health insurance benefit mandates. She builds SAS-based production processes to clean and validate claims and enrollment data, updates data warehouses, and generates reports of financial performance and health care quality indicators for accountable care organization (ACO) clients.

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

  WV Department of Human Services (DoHS)

  - *Child Welfare Initiatives Project (11/2020 – present)*
    Arisara conducts quantitative research and assists on cross-bureau projects with the Bureau for Behavioral Health, Bureau for Medical Services (BMS), and Bureau for Social Services teams. As the lead healthcare economist and visualization designer/creator for the WV DoHS child welfare system initiatives, Arisara meets regularly with all three DoHS bureaus in developing metrics and reports in interactive dashboards and flexible on-demand reporting tools.

  WV Bureau for Medical Services (BMS)

  - *Data Improvement Project (DIP) (12/2019 – present)*
    Arisara conducts deep-dive analyses on data quality discrepancies and usability issues across the State's MMIS system and data warehouse pipelines. She

interacts with BMS and BMS vendors to share/present findings and assists in data quality resolution recommendations.

Blue Shield of California (11/2011 – 05/2018)

- **Medical Informaticist - Medical Management Analytics (05/2017 – 05/2018)**

  Arisara designed and continually improved Tableau dashboards to track cost of healthcare savings from initiatives such as ClaimXten clinical editing, spine surgery / pain management, and radiology pre-service authorization programs. She performed medical and payment policy analyses to inform the Medical Policy Impact Committee, enable new decisions, and evaluate ongoing practices. Other duties included documenting business requirements and designing data models to store post-service clinical review records in the new enterprise data warehouse infrastructure and serving as the team's Tableau Ambassador to establish and encourage best practice standards for server publishing, efficiency, and data visualization.

- **Medical Informaticist - Medical Operations Analytics (11/2011 – 01/2014)**

  Arisara built and enhanced analysis methods, data systems, and web-based reporting tools. As a medical informaticist, she critically reviewed existing processes to identify inefficiencies and potential problems, took actions to explore and implement solutions, and directly supported the Chief Health Officer, Vice Presidents, and Directors to achieve corporate goals. She set-up an automated interface to deliver daily data feeds from internal data marts to the case management system vendor to enhance member-level case management, and established and maintained a robust model to calculate savings from pre-service review activities and medical policies, which revealed significant cost reduction opportunities.

BMC Health System, formerly BMC HealthNet Plan (07/2007 – 05/2017)

- **Medical Economics Principal (01/2014 – 05/2017)**
  Arisara led the development of numerous complex and time-sensitive analyses to support the CFO, Chief Actuary, and Vice Presidents. She analyzed data to support Medicaid payment method re-pricing, primary care physician attribution, and ACO contract strategy. Other tasks included fulfilling state reporting requirements for total medical expense and relative pricing, developing the quarterly medical expense dashboard, collaborating with IT to help ensure data integrity and resolve issues, and guiding junior and senior analysts on SAS/SQL coding, enterprise reporting definitions, and best practices.

- **Senior Medical Economics Analyst (07/2007 – 11/2011)**
  Arisara tracked medical care expenses and utilization trends to inform senior management and influence key decisions on budgeting and pricing projections. She created reporting packages to satisfy the needs of internal and external customers, conducted research with Medical Directors to build methodologies for identifying at-risk patients for telephonic outreach programs as mandated by state authority and corporate

goals, prepared and presented ad hoc analyses to support key corporate initiatives to improve care quality and reduce cost, and coordinated with IT to validate data quality and make recommendations on process and system improvements. Arisara was also responsible for writing project plans, business requirements, technical specifications, and analytic definitions, and for coaching staff on healthcare data, data warehouse structures, and the analytic tool being used.

Harvard Pilgrim Health Care (06/2004 – 07/2007)

As medical economics analyst, Arisara designed and developed claim-based algorithms to pinpoint patients for internal disease management programs such as Oncology, End-Stage Renal Disease, High-Risk Pregnancy, and Cardiac. In addition, she was responsible for building and maintaining related registry records. She worked in partnership with Medical Management and Actuarial to develop the appropriate approach to calculating the return on investment for disease management programs, produced and summarized the key findings of ad hoc strategic financial and budget projection reports, evaluated historical statistics and administrative information to pinpoint recent and prospective budgeting and pricing trend drivers, planned and implemented user acceptance testing procedures and SAS programming templates to validate the integrity of the new enterprise data warehouse and web-based reporting tools, documented and automated data mining and reporting processes to achieve consistency and efficiency, and provided SAS and general analytical training to other analysts.

BlueCross BlueShield of Massachusetts (05/2002 – 06/2004)

- **Finance Development Program for Audit and Controls (01/2004 – 06/2004)**

  Arisara completed operational and IT readiness assessments of new product development initiatives. She performed ad hoc data extractions and analyses to support internal and external audit services, and assisted the legal department to help ensure that appropriate confidentiality agreements are in place before releasing any HIPAA-protected health information to external parties.

- **Analyst (05/2002 – 01/2004)**

  Arisara evaluated the financial and clinical effectiveness of Cardiac and Diabetes disease management programs. She oversaw data compilations and rate calculations for several NCQA HEDIS measures, co-wrote annual population-based analysis publications to present the top 20 medical conditions affecting insured populations, and studied and compiled claim and medical chart review data to secure the annual supplemental Medicare + Choice payments for the heart failure patient population.

CommunityCare of Oklahoma (05/2000 – 05/2002)

As an analyst, Arisara extracted and analyzed healthcare data to satisfy the needs of internal and external customers. She constructed, updated, and maintained databases for various uses, such as NCQA HEDIS rate calculations, the pharmacy data warehouse, and the dental claims

b) BerryDunn

database. She also maintained reference tables to enable consistent and accurate reporting capabilities.

b) **BerryDunn**

Fei Zou, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Healthcare Analyst
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Master of Science in Mathematical Science, University of Massachusetts Lowell
	Bachelor of Science in Applied Mathematics, Tongji University
	SAS Certified Advanced Programmer for SAS 9

Overview

Fei is an experienced analyst with more than 10 years' experience in the Healthcare industry, including nine years with Medicaid managed care organizations (MCO). She is proficient in SAS, SQL, and MS Excel and is familiar with medical and pharmacy claims, HEDIS, CMS/NCQA/PQA measures, DRG and Risk Adjustment. She has developed her skills in learning quickly, multitasking, and working both independently and on a team.

Experience

BerryDunn (07/2021 – present)

Fei is a Senior Healthcare Analyst in BerryDunn's Health Analytics Practice Group, supporting various projects with data visualization, analysis, and reporting.

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

  WV Department of Human Services (DoHS)

  - *Child Welfare Initiatives Project (07/2021 – present)*
    Fei coordinates the data collection efforts from various DoHS Bureau for Medical Services (BMS) and the Bureau for Social Services (BSS) vendors, ensuring timely and accurate delivery of data to support the Office of Quality Assurance for Children's Programs (OQA)'s reporting. She conducts thorough data quality review and analysis to maintain high standards of data accuracy and process reliability, which further guides the data collection workflow changes and requirement specifications. Fei plays a key role in supporting the ingestion and implementation of these systems and program data sources into the comprehensive data store. She is also on the core team to meet regularly with BMS and BSS program teams to support the generation of monthly, quarterly, semi-annual, prototype, and ad-hoc/stop-gap reports, analyses, and visualizations to meet OQA's reporting and Continuous Quality Improvement (CQI) program operation needs.
  - Data Improvement Project (*07/2021 – present*)

Fei supports the data reconciliation efforts during MMIS data warehouse system migration, ensuring accuracy and consistency between legacy and new systems. She is on the core technical team that develops and implements effective strategies and technical solutions to identify data issues, including duplications, unusual trends, and mismatches in information. She collaborates with the State vendors in recommending resolutions to address identified data quality issues.

- **Community Care Behavioral Health (CCBH)** *(07/2021 – present)*
  - Fei leads the generation of monthly financial reports, which provides the client, a Medicaid behavioral health managed care organization, with comprehensive insights of cost trending and supports the regulatory reporting submission to the State of Pennsylvania's Medicaid agency. She spearheads efforts to streamline the report generation process, identifying inefficiencies and implementing solutions to enhance efficiency and accuracy; conducts ad-hoc trend analysis to identify patterns and anomalies. She executes precise data manipulation for actuarial models, ensuring accuracy and integrity in complex financial calculations.

- **New Hampshire Insurance Department (NHID) (07/2023 – *present*)**
  - Fei plays a key role in the health cost transparency initiative by managing regular updates to the NH health cost website, ensuring accurate and up-to-date information for consumers. She provides in-depth analysis for healthcare providers, offering insights into cost trends, and comparative benchmarks. She helps implement automation initiatives to streamline the manual reporting processes.

BMC Health System (formerly HealthNet Plan/WellSense) (08/2012 – 07/2021)

Fei worked as a health data analyst II, senior health data analyst, and senior medical economics analyst. She led the development and production of regulatory reports in collaboration with the state Medicaid agencies including Massachusetts Executive Office of Health and Human Services, New Hampshire Department of Health and Human services. She developed and analyzed monthly reports to identify high risk/high utilization Medicaid population for care management. Fei supported strategic planning including risk adjustment and quality improvement initiatives. She created a results-tracking dashboard for utilization trends, quality measure compliance, and care management operations for both internal and external clients. Fei also investigated unusual utilization trends, built and maintained a profitability database for an Accountable care organization (ACO) model, and worked on the claim service categorization from the design phase to the user acceptance testing (UAT) phase. She was responsible for code migration and impact analysis for the ICD9/ICD10 transition and training for new hires.

Health Dialog (08/2010 – 08/2012)

Fei worked as an evaluation analyst designing code models to estimate clinical outcomes and

financial impact. She consulted with internal and external customers for an appropriate analysis plan and debugged, reviewed, and wrote Standard Operating Procedures for SAS products.

b) BerryDunn

Lloyd Butler, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Master of Science in Mathematics, Northeastern University Bachelor of Science in Mathematics and Computer Science, Ithaca College

Overview

Lloyd is a senior consultant in the Health Analytics Practice at BerryDunn. He is an experienced data and IT professional with efficient programming, process and project management, business intelligence, and cybersecurity skills. Lloyd works collaboratively with clients to help them design and implement a shared vision by utilizing project management experience and a familiarity with agile frameworks, daily standups, sprint planning, and release planning. He has extensive experience working with and building relationships with a wide range of stakeholders. Lloyd is proficient with numerous applications, such as SQL Server Management Studio, SQL Developer, Mirth, Git, Asana, Jira, Slack, Sisense, Okta, SharePoint, Microsoft Office, and Microsoft Visual Studio .NET. His proficiency in programming language also includes Structured Query Language (SQL), Statistical Analysis System (SAS), Python, Bash, PL/SQL, Perl, JavaScript, CSS, HTML, XML, VBScript (Active Server Pages), Visual Basic, VB for Applications, Java, C++, and C#.

Experience

BerryDunn (12/2020 – present)

Lloyd works within the Health Analytics Practice Group, as a senior consultant, to support clients to improve their workflows and quality of work, helping them achieve future visions by analyzing existing applications and determining methods to increase their efficiency. This requires identifying business requirements, analyzing data, and understanding quality needs, as well as designing and implementing the solution. Lloyd deftly moves between various tools to complete these ends, often working with tools such as SQL Server, Oracle, and SAS.

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

  WV Department of Human Services (DoHS)

  - *Child Welfare Initiatives (CWI) Project (01/2021 – present)*
    Lloyd supports the CWI project through the data lifecycle needed for the project. He meets regularly with data providers, analysts, and cross-bureau teams including the Bureau for Medical Services, Bureau for Behavioral Health, Bureau for Social Services, and the Office of Quality Assurance. He receives cross-bureau and provider level data, designs the data mart, writes code to load and

transform the data, performs cross-bureau ad hoc analysis, and supports the team with project management and internal process improvement.

o *Data Improvement Project (DIP) (10/2021 – 10/2022)*
Lloyd loaded and organized raw X12 EDI (Electronic data interchange) into a data store for the analytic team to consume. This required using Mirth to consume and transform the data into a useable form. He worked with the analysts to understand their data storage requirements and review of the final data store.

High Value Healthcare Collaborative (HVHC), Dartmouth College (2013 – 2020)

As a senior manager of IT operations, Lloyd wrote and suggested improvements to complex SAS and SQL code. In his role as infrastructure manager, he was responsible for server environment stability and security and maintained all server-based software installations. Lloyd managed external vendors when conducting security assessments, audits, penetration tests, and other activities necessary to secure HVHC data. He was also responsible for overseeing the implementation of security improvements to maintain strict CMS requirements and for developing and maintaining security plans and related documents. Lloyd was an effective and collaborative mentor to analysts and programmers.

Northern New England Accountable Care Collaborative, Dartmouth College (2012 – 2015)

Lloyd served as a lead programmer and technical liaison, managing a wide variety of IT, analytic, and business tasks to support the start-up from the onset. He worked closely with a consultant company to implement a new web-based patient care product and he managed technical relationships with multiple clients and vendors. Lloyd also provided day-to-day technical and user support for co-workers and worked closely with leadership to legally wind-down the organization.

Health Dialog (2005 – 2012)

In this role, Lloyd was the designer and programmer of a Physician Performance Measurement System (PPMS). The PPMS was used to generate reports for Maine Patient Centered Medical Home programs. Lloyd was responsible for bimonthly PPMS releases (testing, change request management, rollout) and documented PPMS and presented technical aspects of PPMS to company departments. In addition, Lloyd implemented Healthcare Effectiveness Data and Information Set (HEDIS) and proprietary measures for use by PPMS and worked with the operations team to make HEDIS measures available company wide. Lloyd also wrote stock programs to aid in analysis and streamlined existing processes to improve efficiency and usability.

General Dynamics Information Technology (previously Anteon) (2003 – 2005)

While at Anteon, Lloyd was exposed to and adapted quickly to new technologies and served as a liaison between government customers and the project team. As a research mathematician

b) BerryDunn

and programmer, he was responsible for analyzing, coding, and modifying mathematical models for military use.

Erie Scientific (2000 – 2003)

As a quality control consultant, Lloyd created and modified advanced Excel workbooks and Access databases to improve worker efficiency and assist with quality assurance. Lloyd worked closely with users, training them on how to use these tools most effectively. He also wrote and tested validation suites for FDA controlled databases.

b) BerryDunn

Chris Fanikos, MPH

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

Overview

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

Experience

BerryDunn (11/2021 – present)

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

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

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

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

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

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

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

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

HAVEN Free Clinic (12/2017 – 02/2019)

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

Rennert International (08/2015 – 08/2017)

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

b) BerryDunn

Adam Bowman

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

Overview

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

Experience

BerryDunn (10/2019 – present)

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

  WV Department of Human Services (DoHS)

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

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

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

United States Air Force (03/2012 – present)

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

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

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

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

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

CMS Insurance (10/2011 – 09/2018)

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

b) BerryDunn

Marvin "Ed" Crawford

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

Overview

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

Experience

BerryDunn (04/2019 – present)

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

  WV Department of Human Services (DoHS)

  o *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (EDS) (07/2021 – present)*

  As the systems security lead for the project, Ed provides oversight of privacy and security-related project workstreams. He assists in the development, update, and review processes for security and technical deliverables and helps review and establish documented compliance with system security requirements at the project, Department, and Federal level.

  o *People's Access to Help (PATH) DDI Project Management (04/2019 – present)*
  Ed coordinates numerous reviews for 92 separate deliverables, managing intake of all documents from contract vendor, disseminating to internal reviewers, and compiling comments for posting back to Optum. He also administers accurate documentation and tracking of all deliverables to and from the vendor. He is responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation

industry best practice processes and methodologies for consistency and traceability.

WV Bureau for Medical Services (BMS)

- o *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (04/2019 to present)*
  Ed maintains an Access database for the MITA project used for gathering and compiling data during the annual State Self-Assessment, helping to ensure that BMS consistently maintains compliance with its Federal partners.

West Virginia BMS (06/2010 – 04/2019)

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

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

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

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

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

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

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

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

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

b) BerryDunn

Matthew "Matt" Bria, PMP, CISSP, PCI-QSA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Bachelor of Science in Management Information Systems, Salve Regina University
	Certified Information Systems Security Professional (CISSP)
	GIAC Systems and Network Auditor (GSNA)
	Payment Card Industry Qualified Security Assessor (PCI QSA)
	Project Management Institute (PMI) Certified Project Management Professional (PMP®)
	Prosci® Certified Change Control Practitioner (CCP)

Overview

Matt is an experienced information security and technology leader and a subject matter expert in information security and governance. He possesses a strong knowledge and understanding of security analytics, ERP security, network and cloud security, security architecture, security governance, risk assessments, and compliance. Matt has firsthand experience building and managing security processes that enable organizations to meet their business objectives while ensuring security needs are incorporated into business processes.

Experience

BerryDunn (09/2016 – present)

Matt is a manager in BerryDunn's Government Assurance Practice Area and co-lead of the firm's IT Security practice.

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

  WV Department of Human Services (DoHS)

  - *Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 – 07/2017; 08/2020 – 02/2021)*
    Matt served as the project manager and senior security consultant for the WV E&E Independent Security and Privacy Controls Assessment project. The independent assessment was completed against the Centers for Medicare & Medicaid Services (CMS) Minimum Acceptable Risk Standards for Exchanges (MARS-E) v2.0 framework.

  - *Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (08/2023 – 03/2024)*

b) BerryDunn

Matt served as the project manager and senior security consultant for the West Virginia E&E Independent Security and Privacy Controls Assessment project. The independent assessment was being completed against the CMS MARS-E v2.2 framework.

- *BI-EDS Independent Security and Privacy Controls Assessment (07/2023 – 10/2023)*

  Matt served as the project manager and senior security consultant for the WV BI-EDS Independent Security and Privacy Controls Assessment project. The independent assessment was completed against the CMS MARS-E v2.2 and NIST 800-53 R5 security controls.

- **Goodwill Industries of Northern New England**

  - *PCI Assessment (05/2019 – 10/2019; 11/2020 – 04/2021; 04/2022 – 08/2022)*
    Matt served as a project manager for Goodwill Industries of Northern New England. Matt oversees the PCI assessment that included mapping out of the cardholder data environment (CDE), providing guidance on policies and procedures, completion of relevant self-assessment questionnaires (SAQ), and an Attestation of Compliance (AOC) at the completion of the assessment using the Payment Card Industry Data Security Standards version 3.2.1.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN**

  - *PCI Gap Analysis and PCI Program Development (03/2022 – present)*
    Matt is the lead PCI QSA completing a PCI gap assessment that includes mapping out Metro cardholder data environment (CDE) across all City departments. Matt helps with providing guidance on policies and procedures, performing a PCI gap analysis, and developing a PCI security program to help ensure the security of credit card data.

- **New Mexico Health Insurance Exchange (NM HIX)**

  - *Independent Security and Privacy Controls Assessment (12/2020 – 07/2021; 03/2022 – 08/2022; 04/2023 - 07/2023; 12/2023 - present)*
    Matt serves as the project manager and senior security consultant for the annual CMS MARS-E assessment of the New Mexico Health Insurance Exchange (NM HIX) eligibility and enrollment system. In this role, Matt serves as the primary point of contact for the State and leads all engagement activities for the MARS-E assessment.

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

  - *Independent Security and Privacy Controls Assessment Medicaid Management Information System (MMIS) (06/2020– 09/2020)*

  - *MARS-E Assessment Eligibility Enrollment System (11/2020 – 04/2021; 01/2022 – present)*
    Matt serves as the project manager and senior security consultant for MMIS NIST-based assessment and the annual CMS MARS-E assessment of the PRMP eligibility and enrollment system. In this role, Matt serves as the primary point of

contact for PRMP and leads all engagement activities for the MARS-E assessment. Additionally, Matt provides subject matter expertise in assisting PRMP is developing and maturing their security organization and governance structure.

- **City of Scottsdale, AZ**
  - o *Security Assessment (01/2020 – 05/2020)*
  - o *Wireless Network Assessment (01/2022 – 05/2022)*
    Matt served as the project manager and senior security analyst for the City of Scottsdale. In this role, Matt served the primary point of conduct for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's security posture and wireless network environment.

- **City of Phoenix, AZ**
  - o *Database and Server Security Assessment (06/2019 – 02/2020)*
    Matt served as the project manager and senior security analyst for the City of Phoenix. In this role, Matt served the primary point of conduct for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's database and server infrastructure.
  - o *IT Asset Management (11/2020 – 05/2021)*
    Matt was the project manager and senior security analyst for the City of Phoenix. In this role, Matt served as the primary point of contact for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's IT asset management processes.
  - o *Water Services Department (11/2021 – 05/2022)*
    Matt served as the project manager and senior security analyst for the City of Phoenix. In this role, Matt served the primary point of conduct for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's database and server infrastructure, IT asset management, and Water Service Department security assessment.

- **Missouri Department of Social Services, MO HealthNet Division**
  - o *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (09/2021 – 05/2022)*
    Matt was the project manager and lead security analyst for a NIST-based security and privacy assessment for four systems contained within the Missouri Medicaid Enterprise. Individual assessments, based on NIST 800-53 R5, of the Medicaid Management Information System (MMIS), Clinical Management Services and System for Pharmacy Claims and Prior Authorizations (CMSP), Program Integrity Solution (PI), and the Business Intelligence and Enterprise Data Warehouse Solution (BIS-EDW) were performed.

- **Bangor Savings Bank (BSB)**

b) BerryDunn

- o *PCI Gap Assessment (10/2020 – present)*
  Matt is the lead PCI QSA completing a PCI gap assessment that includes mapping out BSB's cardholder data environment (CDE), providing guidance on policies and procedures and design of mobile based rewards funding program to help ensure the security of credit card data.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN**

  - o *Information Security Program Development (01/2017 – present)*
    Matt serves as the program manager and senior security consultant for Metro, concentrating on risk management and PCI program development activities. Matt has assisted Metro with developing a risk management framework, an incident response plan, and a strategic roadmap.

- **Minnesota Information Technology Services**

  - o *Independent Security and Privacy Controls Assessment (04/2018– 06/2018; 03/2019 – 06/2019; 01/2020 to 05/2020,01/2021 – 05/2021)*
    Matt served as the project manager and senior security consultant for the annual CMS MARS-E assessment of the Minnesota eligibility enrollment system (METS). In this role, Matt served as the primary point of contact for the State and lead all engagement activities for the MARS-E assessment.

- **Thos. Moser Furniture**

  - o *PCI Assessment (11/2020 – 01/2021)*
    Matt supported completion of a PCI assessment that included mapping out Thos. Moser's cardholder data environment (CDE) across a distributed retail environment, evaluated payment processes, provided guidance on policies and procedures, completion of relevant SAQ, and an AOC at the completion of the assessment using the PCI Data Security Standards version 3.2.1.

- **Colorado School of Mines**

  - o *PCI Assessment (11/2019 – present)*
    Matt is the project manager and lead PCI-QSA for a PCI assessment being conducted for the Colorado School of Mines (Mines). He is completing a PCI gap analysis which includes a review of credit card payment channels, point of sales terminals, policies and procedures, and recommending the appropriate self-assessment questionnaire. Following this, he will conduct an SAQ assessment, complete and sign the appropriate SAQ, and provide an Attestation of Compliance (AOC). Matt will also provide PCI SAQ training to Mines staff.

- **Larimer County, CO**

  - o *HIPAA Assessment (10/2018 – 10/2021)*
    Matt served as the program manager and senior security consultant for the Larimer County HIPAA assessment. In this role, Matt served as the primary point of contact for the County and senior security consultant.

- **City of Long Beach, CA**

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- o *ERP Implementation Quality Assurance (07/2017 – 08/2018)*
  Matt served as technical lead for infrastructure readiness assessment activities for the City's ERP implementation. The assessment activities included analyzing the network, server infrastructure, and security.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN**

  - o *Information Security Program Development (01/2017 – present)*
    Matt serves as the program manager and senior security consultant for Metro, concentrating on risk management and PCI program development activities.

- **Minnesota Information Technology Services**

  - o *Independent Security and Privacy Controls Assessment (04/2018 – 06/2018; 03/2019 – 06/2019)*
    Matt served as the project manager and senior security consultant for the annual CMS MARS-E assessment of the Minnesota Eligibility Enrollment System (METS). In this role, Matt served as the primary point of contact for the State and leads all engagement activities for the MARS-E assessment.

- **Indiana Department of Family & Social Service**

  - o *Independent Security and Privacy Controls Assessment (04/2019 – 05/2019)*
    Matt served as the senior security consultant on the annual MARS-E assessment for Indiana's MARS-E assessment.

- **Missouri Department of Social Services**

  - o *Independent Security Assessments (ISAs) for Missouri Eligibility Determination and Enrollment System (MEDES) (01/2018– 04/2018; 02/2019 – 03/2019; 01/2022 – 05/2022; 03/2023 - 05/2023; 03/2024 - present).*
    Matt has served as the project manager and senior security consultant on the annual MARS-E assessment for the MEDES system.

- **Lewiston, ME, Public Schools**

  - o *IT Assessment (11/2017 – 2018)*
    Matt served as the senior security consultant for the assessment of Lewiston Public Schools.

- **Washington State Auditor's Office (SAO)**

  - o *Local Government IT Security Audits (09/2016 – 12/2016)*
    Matt assisted in the performance of SAO-sponsored information security audits for various municipalities throughout the state, conducting assessment activities and analyzing current environments. He assisted in identifying threats, vulnerabilities, and risks, and provided recommendations for remediation.

TBC Corporation (09/2006 – 08/2016)

As the director of IT Security, Matthew was responsible for all aspects of enterprise-wide security and enterprise production change management for a multi-billion-dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security

architecture, identity and access management, intrusion detection and analysis, multi-factor authentication, advanced malware detection, security analytics, forensics, DLP, incident response, and endpoint protection. In addition, Matt was responsible for the implementation of enterprise-wide security metrics and security policies, and chaired the executive security steering committee. Key accomplishments include:

- Establishing a security governance structure and framework, as well as an enterprise security awareness program, for the entire organization

- Providing security guidance and support for 40+ e-commerce and branded websites

- Chairing the executive security steering committee

- Establishing vulnerability management, patch management, external risk, and penetration testing programs

- Implementing and managing an enterprise SIEM, identity, and governance management solution; an IPS, multi-factor authentication solution; and a web-filtering solution for all corporate, wholesale, and retail locations

- Leading procurement activities, the vendor selection committee, and the implementation of an enterprise identity and access management solution that allowed for the provisioning and maintenance of 10K+ user base, and 3K+ retail and wholesale locations

GTECH Corporation West Greenwich (06/1999 – 06/2006)

As a project manager and software engineer, Matthew provided project management for complex multi-tiered implementations consisting of software development, marketing, new communications networks, and web-based system architecture. He led all project meetings with SMEs/leads from each discipline: software, infrastructure, finance, product development, training, and marketing. He led cross-organizational efforts defining change management, issue tracking systems, operational procedures, and training needs.

Additionally, Matthew developed stored procedures, triggers, scripts, performance tuning, and reports to enhance and support a complex multi-tiered system with Sybase database for multiple lottery project implementations. He also administered and configured the Sybase SQL Server and the Sybase Replication Server. He provided engineering support of quality assurance testing, functional requirement specifications, data dictionaries, white papers, and project plans.

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Mitch Darrow, GPEN

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Bachelor of Science in Mechanical Engineering, Iowa State University
	GIAC Certified Penetration Tester (GPEN)

Overview

Mitch is a manager with 25 years of experience in business system analysis, database design, system architecture, network administration, and design engineering. He has provided leadership on technology projects to measure, analyze, and improve performance issues, training and development, project coordination, as well as strategy and planning for information technology projects related to human services. He joined BerryDunn in 2014 after 14 years with Sappi Fine Paper North America.

Experience

BerryDunn (06/2014 – present)

As part of BerryDunn's IT Security practice, Mitch has worked on projects across the country, including the following:

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

  WV Department of Human Services (DoHS)

  - *Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 – 08/2017; 08/2020 – 02/2021)*
    Annual independent assessment of the security and privacy controls of the WV E&E System using Centers for Medicare & Medicaid Services (CMS) Minimum Acceptable Risk Standards for Exchanges (MARS-E) 2.0 controls framework. The assessments covered all controls. Assessments included vulnerability scanning, web application scanning and penetration testing.

  WV Bureau for Medical Services (BMS)

  - *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017– 09/2018)*
    The Data Visioning and Warehouse Development and Procurement Assistance project was focused on supplying project management services to the State in an effort to assist with the integration of data sources, systems, and databases within West Virginia DoHS.

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

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- o *Independent Security and Privacy Controls Assessment MMIS (07/2020 – 09/2020; 01/2023 – present)*
  BerryDunn performed an independent third-party assessment of security and privacy controls in place over the PRMP Medicaid Management Information System (MMIS). The National Institute of Standards and Technology (NIST) Special Publication 800-53 Revision 4 (SP 800-53 R4) moderate set of controls will form the basis of the security and privacy controls that will be assessed. The assessment included configuration testing, vulnerability scanning, web application testing, and penetration testing.

- o *MARS-E Security Assessment (11/2020 – 04/2021; 12/2022 – 05/2023)*
  Independent assessment of the security and privacy controls of the Puerto Rico Eligibility and Enrollment System using CMS' MARS-E 2.0 and 2.2 controls framework. The assessments included vulnerability scanning, web application scanning and penetration testing.

- **Metropolitan Government of Nashville and Davidson County, TN**

  - o *Information Security Program Development (05/2016 – present)*
    Completing an annual risk assessment based around NIST 800-53 rev. 4 moderate controls. A maturity assessment was completed based around C2M2 modeling annually for three years.

  - o *Water Services Penetration Test (06/2021 – 12/2021)*
    Completed a penetration test of the Metro Water Department. Phase 1 of the project was to use open-source intelligence tools to determine the Water Departments footprint that might be exploitable. Phase two was to validate if an attacker gained access to the Metro Water Department Network the attacker would not be able to gain access to the SCADA network.

  - o *Water Services Security Assessment (04/2018 – 10/2018)*
    Security assessment of the Nashville, TN Water Services Department Process Control Systems (PCS) and network security controls. The National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF) and the American Water Works Association (AWWA) Process Control System Security Guidance for the Water Sector were used for the security control set for the assessment.

  - o *IT Assessment of Davidson County Sheriff's Office (04/2017 – 10/2017)*
    Conducted Criminal Justice Information Services (CJIS) security audit for the County Sheriff's Office.

- **New Mexico Health Insurance Exchange**

  - o *Independent Security and Privacy Controls Assessment (12/2020 – 07/2021; 03/2022 – 08/2022; 04/2023 – 08/2023)*
    Annual independent assessment of the security and privacy controls of the New Mexico Health Insurance Exchange (NM HIX) eligibility and enrollment system using CMS' MARS-E 2.0 and 2.2 controls framework. The assessments covered all

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controls and Year 1 controls along with vulnerability scanning, web application scanning and penetration testing.

- **Ohio Department of Public Safety (OH DPS)**
  - *Penetration Testing (03/2023 – 06/2023)*
    Conducted vulnerability scans and penetration testing of the OH Department of Public Safety environment.

- **Missouri Department of Social Services**
  - *Independent Security Assessments (ISAs) for Missouri Eligibility Determination and Enrollment System (MEDES) (01/2016 – 06/2016; 01/2017 – 05/2017; 01/2018 – 03/2018; 03/2019 – 04/2019; 01/2020 – 04/2020; 01/2021 – 06/2021; 01/2022 – 05/2022; 03/2023 – 05/2023)*
    Annual independent assessment of the security and privacy controls of the Missouri Eligibility Determination and Enrollment System (MEDES) using CMS' MARS-E 2.0 and 2.2 controls framework. The assessments covered all controls, Year 1, Year 2, and Year 3 controls. Assessments included vulnerability scanning, web application scanning and penetration testing.

- **Kennebec County, ME**
  - *Cyber Security Services (04/2023 – 10/2023)*
    Conducted vulnerability and penetration testing of the Kennebec County environment.

- **City of Scottsdale, AZ**
  - *Ransomware Readiness Assessment (01/2023 – 06/2023)*
    Assessed the City's capabilities to respond to a ransomware event following the NIST CSF. Additionally, an incident response tabletop exercise was also developed and conducted.
  - *Wireless Network Security Assessment (01/2022 – 05/2022)*
    Performed a vulnerability assessment of the enterprise wireless network and evaluate security controls pertaining to: Wireless network architecture, encryption, configuration Management, access management, and monitoring.
  - *Security Assessment (12/2020– 04/2021)*
    The City Auditor's Office engaged BerryDunn to perform an IT cybersecurity audit to evaluate the effectiveness of the City's network security controls. The audit performance period was December 2020 through March 2021

- **City of Phoenix, AZ Auditor's Department**
  - *Web Application Vulnerability Scanning and Penetration Testing (04/2023 – present)*
    Web application testing of external facing web applications for three areas of the City of Phoenix. These areas were Aviation, eCHRIS and Pays Online.
  - *Water Department Security Assessment (11/2021– 04/2022)*
    Security assessment of the City of Phoenix (City) Water Services Department Process Control Systems (PCS) and network security controls. The assessment

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performance period is December 2021 through March 2022. The National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF) and the American Water Works Association (AWWA) Process Control System Security Guidance for the Water Sector were used for the security control set for the assessment.

- o *IT Asset Management Audit (06/2020– 03/2021)*
  Assessed the City's IT Asset Management (ITAM) practices. The assessment included policy and procedure review, interviews with key stakeholders, and verification of IT asset management practices.
- o *Database and Server Security Assessment (06/2019 – 11/2019)*
  Conducted a security assessment of City database and server administration practices which included an analysis of log management, audit logging, configuration management, and patch management practices.

- **Glynn County, GA**

  - o *Independent Security Assessments (08/2022 – 12/2022)*
    Performed a cybersecurity risk assessment for the County using the NIST Cyber Security Framework (CSF).

- **Alaska Division of Legislative Audit**

  - o *General Controls / Application Controls Examination (03/2016 – 06/2022).*
    Conducted an examination of the IT general controls and application controls related to Integrated Resource Information System (IRIS), with a goal of compliance and attestation of the general and application controls.

- **Missouri Department of Social Services, Missouri HealthNet Division**

  - o *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (10/2021 – 05/2022)*
    Conducted NIST 800-53 R5 independent security risk assessments for the following systems:
    - Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP)
    - Medicaid Management Information System (MMIS)
    - Program Integrity (PI)
    - Business Intelligence Solution/Enterprise Data Warehouse (BIS-EDW)
      Each of the assessments included configuration testing, vulnerability scanning, web application testing, and penetration testing.
  - o *Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP) ISA (01/2016 – 09/2016)*
    Conducted NIST 800-53 R4 independent security risk assessments for the Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP).

- **Minnesota Department of Employment and Economic Development (DEED)**

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- o *Audit, Risk Assessment, Technical Review, and Security Review of Unemployment Insurance (UI) Strategic Program (06/2021 – 01/2022)*
  Conducted security assessment of Minnesota DEED User Interface (UI) Strategic Modernization Program. Performed a security system readiness assessment and system testing which included: Configuration testing, Vulnerability Testing, Web Application testing and Penetration testing.

- **Minnesota Information Technology Services**
  - o *Independent Security and Privacy Controls Assessment (04/2018 – 06/2018; 03/2019 – 06/2019; 01/2020 – 05/2020; 01/2021 – 05/2021).*
    Annual independent assessment of the security and privacy controls of the Minnesota Eligibility Technology System (METS) using CMS' MARS-E 2.0 controls framework. The assessments covered all controls, Year 1, Year 2, and Year 3 controls along with vulnerability scanning, web application scanning and penetration testing.

- **Minnesota Department of Labor and Industry (MN DLI)**
  - o *Workers' Compensation Modernization Program Assessment/Audit (07/2020 – 05/2021)*
    Conducted security assessment of Minnesota WCMP. Performed a security system readiness assessment and system testing which included: Configuration testing, Vulnerability Testing, Web Application testing and Penetration testing.

- **Alaska Division of Legislative Audit**
  - o *Exam of Alaska's Resource for Integrated Eligibility Services (ARIES) General and Application Controls (06/2019 – 10/2019)*
    Conducted an IT controls audit of the State's Health and Social Services system associated data warehouse. Control effectiveness was tested by analyzing security-related information collected. Mitch facilitated on-site interviews with the client and reviewed supporting documentation.

- **Indiana Department of Family and Social Services**
  - o *Independent Security and Privacy Controls Assessment (03/2019 – 06/2019)*
    Independent assessment of the security and privacy controls of the Indiana Eligibility Determination Services System (IEDSS) using CMS' MARS-E 2.0 framework. Assessment included an assessment of all MARS-E controls along with vulnerability scanning, web application scanning and penetration testing.

- **Columbia College**
  - o *Vulnerability Scanning and Penetration Testing (02/2019 – 04/2019)*
    Conducted external vulnerability scanning, penetration testing and reporting services for the College.

  - o *Gap Analysis and Project Management Services (08/2017– 06/2018)*
    This project was an effort to measure and remediate compliance with the Affordable Care Act (ACA) in WV across the Medicaid Enterprise. In addition to the primary project directive, the project team provided ongoing support, research, and policy

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analysis to help the State evaluate federal guidance, identify, and leverage opportunities, and provide guidance around political and regulatory risks. Mitch managed and supported an impact traceability matrix, which used automated processes to distribute and manage project workflow.

- o *Desk-Level Procedures Review (10/2014 – 12/2015)*
  Mitch conducted deliverable reviews of Desk-Level Procedures (DLPs).

- **Sacramento Municipal Utility District (SMUD)**

  - o *Information Security Audit (05/2016 – 11/2016)*
    Conducted security risk assessment of SMUD technical infrastructure and control systems.

- **City of Philadelphia, PA**

  - o *Criminal Justice Information Systems (CJIS) Active Directory Audit (08/2015 – 12/2015)*
    Conducted Criminal Justice Information Services (CJIS) security audit of Active Directory.

- **Colorado Department of Human Services**

  - o *Child Care Tracking System (CHATS) Needs Assessment and RFP Development (06/2014 – 10/2014)*
    Mitch conducted an assessment of the current childcare automated tracking system for the CDHS to understand its technical feasibility relative to the Colorado Child Care Assistance Program. He was involved in defining the current and future system requirements and contributing technical details to project deliverables.

Sappi Fine Paper North America (03/2000 – 05/2014)

Over his 14-year tenure with Sappi Fine Paper, Mitch served in multiple roles, including:

- **Lead Business Systems Analyst/Architect**

  In this role, Mitch served as a project team leader who reviewed and analyzed the database infrastructure and performance, implemented a multi-node cluster to improve maintainability, and reduced associated downtime for the business. He also measured and analyzed performance issues, and designed and implemented changes to the environment to improve the overall performance of the system.

- **Primary Engineer**

  As primary engineer for the corporate SharePoint environment, Mitch was responsible for managing the infrastructure and creating an internal SharePoint user group to share solutions and ideas.

- **Lead Engineer**

  Mitch was lead engineer for the management of the global Active Directory environment. This environment connects four continents with over 130 domain controllers and is utilized by business systems around the globe.

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- **Supervisor Service Center Team**

  Mitch was a leader responsible for the transformation of the service delivery of first-line support (help desk). He improved the team's service delivery by improving the speed at which calls were answered while conforming to Information Technology Infrastructure Library (ITIL) recommendations for Problem and Incident Management.

Hach Company/Danaher Corporation (1989 – 2000)

- Network Administrator/Network Systems Engineer
- Design Engineer

Presentations

"Using PowerShell to Improve SharePoint Management," SharePoint Saturday Boston, September 10, 2016, http://www.spsevents.org/city/Boston/Boston2016/speakers#

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Sarah Vintorini

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Science, Business Administration/Marketing, West Virginia State University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT+ MCMP II)

Overview

Sarah is a senior consultant with BerryDunn's Medicaid Practice group, bringing extensive experience with complex project coordination and oversight, thoughtful meeting facilitation, and effective communication skills to projects. Sarah has a long-proven track record in marketing, communications, and community development with cross-functional organizations of all sizes. Sarah is a skilled senior consultant with strong organizational and interpersonal communication skills and demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Sarah lends invaluable expertise related to the development, delivery, and maintenance of key project documents and helps support engaging and productive relationships with clients as well as vendors.

Experience

BerryDunn (11/2019 – present)

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

  WV Department of Human Services (DoHS)

  - *People's Access to Help (PATH) DDI Project Management (12/2019 – 03/2021)*
    Sarah provided project coordination, tracked action items, and monitored project risks and issues. Additionally, Sarah assisted the cross-functional team in various project areas, including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.

  - *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (12/2021 – present)*
    As an experienced business analyst, Sarah supported the project with the creation and review of deliverables and monitored the project schedule and action items. Sarah worked closely with the client and vendors on both internal and client deliverables to maintain and strengthen the project's reporting processes. Sarah helped to provide strategic direction on the best approach for monitoring vendor performance and strengthening vendor relationships.

  WV Bureau for Medical Services (BMS)

  - *Medicaid Enterprise System (MES) (03/2020 – 08/2021)*

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Sarah provided business analyst support and deliverable review and development for MES. Sarah developed the As-Is environment deliverable as well as supported the development of the To-Be environment deliverable. In addition, she developed graphics and presentations to support the project.

o *Provider Management Support (PMS) (11/2019 – 08/2021)*
Sarah provided project coordination, deliverable development and review support, and monitored risks and issues related to all sub-projects within PMS. Sarah was involved in the facilitation of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, developed lessons learned, and identified opportunities for leverage and reuse. She assisted in developing a comprehensive outreach plan to educate and engage direct care workers and enroll each worker in the State's Medicaid Management Information System (MMIS).

o *Electronic Visit Verification (EVV) (11/2019 – 06/2023)*
Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues. Sarah helped BMS with the release of their EVV Request for Proposal (RFP), coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of West Virginia's EVV solution.

o *Mental Health (MH) Parity Compliance Report (04/2020 – 08/2020)*
Sarah provided project coordination support, monitored project risks and issues, and assisted with deliverable development of West Virginia's MH Parity Compliance Report. She coordinated meetings with Managed Care Organizations (MCOs) and helped to gather documentation for accuracy related to Fee-for-Service (FFS) and pharmacy claims.

o *Mountain Health Promise (MHP) Implementation Project Management Support (01/2020 – 06/2020)*
Sarah provided project coordination support, deliverable review and creation support, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.

- **Alaska Division of Health Care Services (HCS)**
  - o *MMIS Solicitation Consultant Services (09/2020 – present)*
  Sarah helped develop and distribute a fact-finding survey to gain input from stakeholders and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Additionally, Sarah assists with the development of deliverables, project presentations, and monitors project action items.

WV Governor's Highway Safety Program (2013 – 2019)

Sarah served as a corporate event planner for the West Virginia Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities included securing over $150,000 annual sponsorships, a tradeshow of over 30 vendors from across the country, securing nationally acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event. Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

KISRA (2012 – 2018)

Sarah oversaw all marketing, communications, and special events for one of the state's largest non-profit organizations. Her responsibilities included internal and external communications, sponsor requests, reports to funders, and meetings with funders and stakeholders. In addition, facilitated various program level strategic planning sessions and carried out the implementation of each plan, creative implementation of grant funds, and more. She held numerous committee and program meetings that required planning, organizing, capturing meeting minutes, and timely follow-up after each.

Terrell Ellis & Associates (2003 – 2007; 2009 – 2012)

As a senior program manager, Sarah managed a variety of non-profit and governmental accounts providing services including, but not limited to, fundraising, marketing and outreach activities, meeting facilitation, grant writing and special events. She was responsible for seeking out and securing new clients, client relations, sales, fundraising, strategic planning, meeting facilitation, grant writing, and special events.

The Salvation Army (2001 – 2003)

Sarah served as the director of all communications for one of the state's largest social service agencies. Her responsibilities included securing earned media from print, television, and radio, developing all marketing and outreach materials, implementing a successful Christmas Bell Ringing Campaign, a Capitol Campaign, donor and stakeholder relations, community outreach, and more.

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Amber Davis, CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Bachelor of Arts in Criminology, Indiana University of Pennsylvania
	Non-profit Management Certification, Butler County Community College
	Incident Management Certified Investigator, The Commonwealth of PA, Office of Developmental Programming (CI)
	Certified Community Health Worker (CCHW), Pennsylvania Certification Board
	Prosci® Certified Change Management Practitioner (CCP)
	Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)
	Licensed Real Estate Agent, Pennsylvania Department of State, Real Estate Commission

Overview

Amber is an experienced senior director and Medicaid Health and Human Services subject matter expert (SME) with a proven history of promoting positive and successful business processes and relationships, leading to successful project outcomes. Amber's knowledge and dedication are reflected in her commitment to promote leadership through motivation and intention. She specializes in organizational growth, conflict resolution, effective management, quality assurance, public speaking, innovation, and government relations.

Experience

BerryDunn (09/2022 – present)

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

  WV Bureau for Medical Services (BMS)

  - *Partnership Management (PM) Project and Provider Management Support (12/2023 – present)*
    Amber provides project management support for the partnership management work provided between WV and partnering States and Territories. Amber facilitates team meetings internally and externally and manages the project budget. Additionally, she provides support with vendor meetings, vendor change request needs and scope of work approvals and reviewing project resources to

help ensure leverage and reuse items are completed timely. Amber functions as a liaison between the partnering States and Territories, facilitating the monthly Multi-State Forum and managing the participants' communication between sessions.

- *Advance Planning Document Consulting (APD) Project (05/2023 – present)*
  Amber serves as the project manager for the APD consulting project. In this role, Amber tracks the progress and development of multiple APD documents and the submissions to Centers for Medicare & Medicaid Services (CMS), in support of funding for new and ongoing projects. She communicates with the State, reviews documents, facilitates team meetings internally and externally, and manages budgets, timelines, change request needs, and project resources to help ensure the project remains compliant with contract deliverables.

- *Enrollment (PEA) Project and Provider Management Support (09/2022 – 10/2023)*
  Amber provided project management support for the Provider Enrollment project, responsible for managing project deliverables and resources. She also managed the partnership between WV and the U.S. Virgin Island, working on leverage and reuse initiatives.

- *Electronic Visit Verification (EVV) Solution Implementation Project (09/2022 – 06/2023)*
  As the project manager, Amber was responsible for managing project deliverables, and working closely with the client to help ensure contract requirements and expectations were fully met.

- **New Jersey Department of Division of Medical Assistance & Health Services (DMAHS)**
  - *Provider Management Module (08/2023 – present)*
    Amber functions as a SME, providing specialized knowledge and expertise to the State as relates to Provider Enrollment. She supports the Provider Modernization Business Process Mapping (BPM) and created a project tracking document to highlight areas of focus, regulation references and workstream.

- **Colorado Office of the State Auditor (OSA)**
  - *Colorado Department of Health Care Policy & Financing (HCPF)'s Recovery Audit Contractor (RAC) Program (08/2023 – present)*
    Amber serves as a Medicaid project SME, providing research assistance to evaluate the design and operation of HCPF RAC program for compliance with applicable federal requirements. She has focused on the differentiation of the Colorado RAC programs and policies in comparison to 16 other State Plans. Amber has attended several meetings with State RAC program administrators to identify program specific features.

Centene Corporation, PA Health&Wellness (10/2021 – 08/2022)

As Manager of Provider Relations, Amber led the Long Term Supports and Services (LTSS) provider relations team, covering the Pennsylvania territory. She was responsible for maintaining production and quality standards, external relationships, developing new provider relationships, assisting with contracting activities and was a SME on the CommunityHealth Choices model. Amber would also monitor activities with providers and team members such as provider on-site visits, credentialing, and orientations.

Alliance for Non-profit Resources (10/2012 – 10/2021)

- **Senior Director of Operations and Service Development (09/2017 – 10/2021)**
  Amber led $9.2 million dollars of Medicaid programming and 325+ team members throughout Pennsylvania. She successfully implemented statewide expansion, adding seven regions to daily operations, established $2.5 million dollars of organizational growth from Brokers, Schools, Managed Care Organizations, Administrative Entities, Commercial and Non-profit businesses, and instilled trust in clients by providing them with transparent communications. She enforced quality assurance and contract obligations as well as acted as an informal publicist to highlight team's best qualities, represented ANR during consultations, State, and county level, and served as a Solutions Engineer.

- **Director of Operations (06/2015 – 09/2017)**
  Amber spearheaded General Operations in collaboration with the Board, other executives, and staff, while launching the development of regional expansion planning. She shaped relationships and managed agreements with external partners and evaluated and transformed the efficiency of business procedures according to organizational objectives.

- **Senior Operations Manager (11/2013 – 06/2015)**
  Amber established and carried out departmental/organizational goals, developed programs, policies, and procedures, and oversaw fiscal and budgetary activities.

- **Operations Manager (10/2012 – 11/2013)**
  Amber analyzed and improved departmental processes, monitored daily operations, quality, productivity and efficiencies, and developed program training standards.

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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.

b BerryDunn

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 – 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)*

b BerryDunn

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.

Megan Blount, MBA

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

Overview

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

Experience

BerryDunn (04/2021 – present)

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

- **State of WV**

  WV BMS

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

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

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

b) BerryDunn

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

b BerryDunn

Emily Tan

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Arts in Statistics, Colby College

Overview

Emily is a trained data analyst and statistician. She graduated from Colby College, where she studied statistics. She is a member of the Mu Sigma Rho, the national honorary society for statistics. She had previous internship experience analyzing data and solving business problems with large companies using R, SAS, SQL, and the Agile framework.

Experience

BerryDunn (07/2023 – present)

Emily is a a data and business system analyst within BerryDunn's Health Analytics Practice Group.

- **Medicaid (and Dual-Eligible) MCOs (07/2023 – present)**
  Emily serves as a data and business system analyst to gather requirements, develop analytic and ETL programming in SQL and SAS, and generate reports and visualizations to support a wide range of data and reporting infrastructure build work for the clients' medical cost, VBP, and FWA etc. initiatives.

Western Union (06/2022 – 08/2022)

Emily worked as a User Acceptance Testing Intern to create test cases, assist with documentation, and examine different products for the company. Emily worked with a group of other interns to create a final project, where she analyzed and collected business data.

Pfizer (06/2021 – 08/2021)

Emily worked as a Statistical Programming and Analysis Intern to analyze data and create visualizations for Pfizer's submission data using R. She also worked with the other interns to create a machine learning initiative for the clinical trial process.

b) BerryDunn

Grady Black

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Science in Data Analytics, Bentley University

Overview

Grady is a member of the BerryDunn Health Analytics Practice Group supporting our project staff with data analytics, database management, applied statistics, and programming.

Experience

BerryDunn (05/2022 – present)

As a member of the BerryDunn Health Analytics Practice Group, Grady assists the team and clients with business analysis, data quality analysis, and profiling.

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

  WV Bureau for Medical Services (BMS)

  o *Data Improvement Project (05/2022 – present)*

    As part of the WV Data Improvement Project (DIP), Grady has assisted in developing mapping documents, running ad-hoc analyses, and developing data profiling reports.

  o *Child Welfare Initiative (CWI) (7/2022 – present)*

    Grady supported the CWI project by gathering relevant requirements, creating data dictionaries, crafting a data structure for seamless data entry and generating visuals to describe pertinent trends in CWI data. Grady is currently developing a program that tracks data discrepancies and fluctuations across weekly extract loads, allowing for the database management team to address potential data quality issues and efficiently address client needs and questions.

- **Community Care Behavioral Health (CCBH)**

  o *Actuarial Support (10/2023 - present)*

    Grady supports BerryDunn's actuarial team by troubleshooting production code and producing data visualization dashboards in Tableau to create dynamic views for relevant data points across CCBH contracts.

- **Town of Falmouth Comprehensive Plan**

  o *Local Government Practice Group Support (11/2023 - 12/2023)*

    In support of BerryDunn's Local Government Practice Group, Grady assisted in the presentation of survey results via the manipulation of survey data and the collaborative creation of a public, interactive data dashboard.

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b) BerryDunn

John Reilly

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Programmer/Analyst
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Science in Applied Mathematics and Statistics, Bryant University *(In progress)*

Overview

John is a member of the BerryDunn Health Analytics Practice Group (HAPG), supporting our clients with data analytics, database management, applied statistics, and programming.

Experience

BerryDunn (06/2023 – present)

As a member of the BerryDunn Health Analytics Practice Group, John assists the team and clients with business analysis, data quality analysis and data profiling.

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

   WV Bureau for Medical Services

   o *Data Improvement Project (DIP) (06/2023 – present)*
   John has supported the project by assisting in developing mapping documents, running ad hoc analyses, and developing data profiling reports.

Concord Group Insurance (05/2022 – 08/2022)

John served as a commercial lines underwriting analytics intern where he discovered significant large loss trend based on policy form of business, policy state, previous claims, and pay history. He was also responsible for assembling dataset from policy admin systems and he reviewed new business proposals, renewals, and inspections.

b) BerryDunn

Jorge Vélez-López

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Nursing, Interamerican University

Overview

Jorge is a detail-oriented Quality and Compliance Specialist dedicated to improving policies and procedures in all business areas, as well as removing barriers to care for patients and improving healthcare services. He brings 12 years of experience in the healthcare industry, including project management, HEDIS, NCQA and CMS (Medicare/Medicaid).

Experience

BerryDunn (12/2020 – present)

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

    Jorge has worked as a junior business analyst, project coordinator, and consultant with the Puerto Rico Medicaid Program to develop client deliverables, perform operational research, and identify opportunities to improve business processes. He coordinates meetings, maintains project calendars, and assists with reporting project status, progress, schedule, and quality. He assisted with the documentation review facilitation, tracking, and maintenance. He identifies, documents, and escalates contractual obligations that are at risk or being overlooked. He researches, analyzes, documents, and assists in implementing strategies to improve client's organizational structure. Jorge also assists in the Outcomes-Based Certification process and in collecting evidence to satisfy CMS' operational readiness review and certification review criteria.

Molina Healthcare (04/2015 – 09/2020)

Jorge worked as a quality interventions and compliance specialist to monitor compliance with processes, policies, procedures and standards regarding federal regulations and contractual requirements. He gathered, organized, and evaluated data to make accurate assessments of current operations. He developed analysis methodologies under close supervision of the Quality/Compliance Manager and identified deficiencies, discrepancies, and misinformation issues within projects and programs in order to determine areas of improvement. He collaborated with other departments, assisted in training sessions, and generated reports to keep senior management informed of operations and progress of projects, outlining findings and recommendations from compliance audits, process improvements and project guidelines. Jorge reviewed company forms, contracts, marketing materials, and communication procedures for applicable laws, CMS regulations and guidelines. He improved company policies and standards to outline ethical, compliant, and efficient procedures. He also directed and implemented

strategic improvement plans to promote preventive health screening and remove barriers to care for patients, while improving the percentage of HEDIS measures.

Altegra Health (07/2012 – 04/2015)

Jorge worked as lead project coordinator to arrange presentations for senior leadership and team members detailing project scope, progress, and results, keeping all entities well-informed of milestones and goals. He formulated complete project plans, tracked hours and expenses to keep the project on task and within budgetary parameters, and supervised multiple projects from start through delivery by prioritizing needs and delegating assignments. He managed project schedules, collaborated with team members, and oversaw productivity streams. He also monitored, evaluated, and gave feedback to team members for improvement in the process for all projects.

TeleMedik (03/2010 – 05/2012)

Jorge worked as a project coordinator to supervise multiple projects from start through delivery by prioritizing needs and delegating assignments. He handled project schedules, coordinated appointment scheduling for patient and healthcare provider projects (outbound/inbound calls), and assisted in developing the quality and compliance program.

Jonathan "Jon" Watkins

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

Overview

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

Experience

BerryDunn (10/2021 – present)

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

  WV Department of Human Services (DoHS)

  - *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 – 11/2022)*
    Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon's work helped to ensure the State had a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

  - *WV Public Health Emergency (PHE) Support Project (12/2021 – 12/2022)*
    Jon provided project coordination and monitored project risks and issues to assist the WV DoHS with temporary flexibility that provides services to different beneficiaries during PHE. Jon's work helped to keep the client informed and helped ensure the project met its goals and objective.

  - *WV Certified Community Behavioral Health Clinic (CCBHC) (11/2023 – 12/2023)*
    Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV CCBHC Project when needed. Jon's work helped to keep the client informed and helped ensure the project meets its goals and objectives.

  - *WV People's Access to Help (PATH) (11/2023 – 2/2024)*
    Jon provides project coordination and monitors project risks and issues to assist

the client with management and facilitation for the WV PATH Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

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

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

As an admitting clerk, John worked to schedule and coordinate inpatient and outpatient cases, which included registering patients, verifying insurance, billing, and customer service. He also organized the day-to-day needs of the unit and performed basic bookkeeping duties.

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

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

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

Jon worked as a dispatcher, receiving and dispatching all emergency and non-emergency calls for EMS, Law Enforcement, and Fire for the County. This required handling multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.

BerryDunn

Alycia Minshall, MA

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

Overview

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

Experience

BerryDunn (8/2022 – present)

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

Alycia Minshall Editing Services (3/2014 – present)

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

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

- *Senior Editor (6/2020 – 8/2021)*
  As senior editor, Alycia wrote copy for various mediums, including websites, social media, landing pages, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; meeting notes; and more. She helped to ensure consistency in voice, brand, and tone across messaging channels, as well as helping to ensure that all materials are well-written, accurate, properly researched, objective, concise, and focused. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company

style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

- *Editor (4/2017 – 6/2020)*
  As an editor Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; and meeting notes. She helped to ensure that all materials are well-written, accurate, properly researched, objective, concise, and focused, as well as helping to ensure consistency in voice, brand, and tone across messaging channels.

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

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

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

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

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

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

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

- *Student Director (8/2010 – 12/2011)*
  Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

- *Writing Center Tutor (8/2008 – 12/2011)*
  Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.

b) BerryDunn

Caitlin Cabral

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

Overview

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

Experience

BerryDunn (09/2021 – present)

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

QualityMetric (08/2020 – 09/2021)

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

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

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

True Colors, Inc. (01/2019 – 05/2019)

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is

the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

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

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

Emily Hendrickson

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

Overview

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

Experience

BerryDunn (07/2017 – present)

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

Christianbook (06/2021 – present)

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

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

As freelance editor, Emily provided content edits for nonfiction books, performing line edits and

b BerryDunn

developmental edits to improve structure, flow, and readability. She regularly rewrote significant content for tone, clarity, and structure and performed information-gathering to revamp text and fact-check quoted material.

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

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

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

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

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

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

Civil Consultants (09/1999 – 07/2014)

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

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

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

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Janine DiLorenzo

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.

BerryDunn

Jonathan "Jon" Williams

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

Overview

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

Experience

BerryDunn (02/2019 – present)

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

Freelance Proofreader and Copyeditor (11/2010 – present)

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

Midwest Tape (11/2004 – present)

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

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

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

BerryDunn

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

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

Jordan Ramsey, MA, LSSGB

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

Overview

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

Experience

BerryDunn (07/2019 – present)

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

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

Portland Adult Education (2019)

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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

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

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

The Southern Illinoisan (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

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

- **Hardin County, IL**

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

- **NOVA Group of Japan**

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

b BerryDunn

Megan Hamilton, MA

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

Overview

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

Experience

BerryDunn (12/2022 – present)

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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

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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.

b) BerryDunn

Carole Ann Guay

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

Overview

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

Experience

BerryDunn (10/2014 – present)

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

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

  WV Department of Human Services (DoHS)

  - *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 – 07/2017)*
    Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

- **Puerto Rico**

  - Enterprise Objective Monitoring and Control (09/2023 – present)
    Carole Ann assists with review and updates of deliverables.

- **Ellis County, TX**

  - Computer-Aided Dispatch and Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 – present)
    Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

- **City of Saint Charles, MO**

  - Enterprise Resource Planning (ERP) System Selection Project (09/13/2023 – 10/06/2023)
    Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN**

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- o *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**
  - o *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)**
  - o *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)**
  - o *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**
  - o *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)**
  - o *Local Government IT Security Audits (11/2014 – 06/2017)*
    Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 – 2014)

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

b BerryDunn

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.

Katie McDonald, MBA

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

Overview

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

Experience

BerryDunn (05/2022 – present)

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

  WV Department of Human Services (DoHS)

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

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

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

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

WV Bureau for Medical Services (BMS)

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

o *Provider Enrollment (PEA) Project and Provider Management Support (08/2023 – 10/2023)*
Katie provided project coordinator assistance with planning, developing, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

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

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

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

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

b) BerryDunn

Cate Poling

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

Overview

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

Experience

BerryDunn (06/2021 – present)

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

- **State of WV**

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

- *Data Improvement Project Phase 4 (06/2023 – present)*
  As a project manager, Cate assists with refining, expanding, and
  initiating the DIP systems development lifecycle (SDLC) body of work and
  preparing for the transfer of the work to the SDLC Coordination Project.
  This includes organizing project timelines, arranging meetings with
  sponsors and vendors to communicate and understand deliverable
  expectations and enhanced change management processes, creating
  reference materials, and establishing document repositories and process
  workflows. She facilitates meetings between BerryDunn, State, and
  vendor(s) to help track DIP efforts, including those related to Transformed
  Medicaid Statistical Information System (T-MSIS) needs and State
  reporting needs, reviews meeting notes, agendas, and monthly status
  reports, and helps draft and refine project deliverables. Cate also assists
  with WV engagement hours and resource planning oversight within this
  role.

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

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

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

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

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

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

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

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Services (CMS) Streamlined Modular Certification (SMC) guidance.

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

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

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

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

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through e-prescribing and via telephone and fax; arranged pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required 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.

b) BerryDunn

Kourtney Kirk

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

Overview

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

Experience

BerryDunn (10/2022 – present)

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

   WV Department of Health and Human Services (DoHS)

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

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

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

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

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

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

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

TEKSystems (08/2020 – 01/2022)

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

  WV Department of Health and Human Services (DoHS)

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

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

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

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

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

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

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

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

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

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Shandia Benke, ECBA™

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

Overview

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

Experience

BerryDunn (04/2018 – present)

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

(04/2018 – 02/2019)

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

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

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

Hentges Tree Service (2013 – 2015)

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

Wells Fargo Home Mortgage (2012)

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

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, the State PMO will develop and deliver a status report to the DHHR Executive Steering Committee. The project status report will include a status of project deliverables, timelines, issues, and risks.
2	Monthly Status Report	On a monthly basis, the State Project Management Office (PMO) will develop and deliver a status report to the DHHR and BMS leadership. The project status report will include a status of project deliverables, timelines, issues, and risks.
3	Project Schedule	The Project Schedule will provide the schedule of tasks, milestones, and deliverables for the Data Hub project.
4	Data Hub To Be Architectural Diagram	The To Be Architectural Diagram will provide a high-level architecture diagram of the Data Hub.
5	Executive Summary of Data Hub's Purpose and Function in the MCES	The Executive Summary will provide a high-level description of the Data Hub's purpose and function as part of the overall MCES ecosystem.
6	Provider Data Hub Proof of Concept Scope Document	The Proof of Concept Scope Document will provide a description of what is in scope and what is not in scope for the Data Hub pilot project.
7	User Stories and Functional requirements captured in Jira®	User stories and functional requirements will be captured in Jira® to help inform the solution development.
8	Cloud Infrastructure Diagram	The Cloud Infrastructure Diagram will provide a detailed system diagram of all the cloud services being employed for the Data Hub solution.
9	Data Flow Diagram	The Data Flow Diagram will depict the flow of data from source systems to target systems.
10	Legacy and New Provider Module Source to Target Data Mapping Document	The Legacy and New Provider Module Source to Target Data Mapping Document will be a detailed field level mapping of the legacy provider module to the Data Hub and of the new provider module to the data.

Deliverable #	Deliverable Name	Deliverable Description
11	Data Hub ERD	The Data Hub Entity Relationship Diagram (ERD) will depict the relationships between tables and fields in the Data Hub to show the database design.
12	Provider Interface Specifications	The Provider Interface Specifications document will be the input and output interface specification detailing the input/output fields for vendors to use to map to their systems.
13	Preliminary Security Audit Report	The Preliminary Security Audit Report will be a security report prepared by BerryDunn in preparation for the 3rd party security audit.
14	Unit Test Results Report w/each Sprint completion	After the completion of each sprint, the project team will create a report showing the results of all unit tests run for the code developed for that sprint.
15	Sprint Overview Report/Release Notes	After the completion of each sprint, an Overview Report/Release Notes will be published to the shared document repository providing details about the completed sprint.
16	Test Approach Plan	The Test Approach Plan will detail the different test approaches that will be employed at different phases of the Data Hub project.
17	3rd Party Security Validation Report	The Security Validation Report will be a detailed security report showing security compliance and any vulnerabilities of the Data Hub conducted by a 3rd party security vendor.
18	Communication Plan	The Communication Plan will detail the types and frequency of communications to interested parties.
19	Training Plan	The Training Plan will detail what training will be required, to whom, and at what frequency.
20	Change Management Plan	The Change Management Plan will detail what organizational change management processes will need to occur in to help ensure a smooth transition to the Data Hub.
21	Readiness Checklist/Go/No-Go Decision	The Readiness Checklist/Go/No-Go Decision document will be a checklist that needs to be completed to help ensure a successful Data Hub go-live in production.
22	Operations Runbook	The Operations Runbook will be a document that details the operational processes necessary to run the Data Hub.

Deliverable #	Deliverable Name	Deliverable Description
23	SLA Report	The SLA Report will be a monthly report detailing the agreed upon SLAs and how the Data Hub are conforming to the SLAs.
24	Operations and Support Plan	The Operations and Support Plan will detail the processes and procedures for operating and supporting the Data Hub after go-live.
25	System Monitoring Plan	The System Monitoring Plan will detail the system monitoring that will be implemented, how they will be monitored and who will perform the monitoring.
26	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

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Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym	Definition
APD	Advanced Planning Document
AWS	Amazon Web Services
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MCES	Medicaid and Children's Health Insurance Program Enterprise System
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
SOW	Scope of Work
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
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 ⓘ

○ All Words ⓘ

○ Exact Phrase ⓘ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"	✕

Entity ⌄

Location ⌄

Status ⌃

☑ Active

☐ Inactive

Reset ↻

ⓘ

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information

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

Organization Information

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

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Addresses

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

Officers

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

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DBA

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

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

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Tuesday, June 4, 2024 — 2:12 PM

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