



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 05-31-2024

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

| | | | |
|-----------------------|-------------------------------|--------------------------|--------------------------|
| Order Number: | CDO 0511 3839 MIS2400000009 1 | Procurement Folder: | 1435631 |
| Document Name: | WV PATH Project Phase III | Reason for Modification: | |
| Document Description: | WV PATH Project Phase III | | |
| Procurement Type: | Central Delivery Order | | |
| Buyer Name: | Crystal G Hustead | | |
| Telephone: | (304) 558-2402 | | |
| Email: | crystal.g.hustead@wv.gov | | |
| Shipping Method: | Best Way | Master Agreement Number: | CMA 0511 HHR2100000003 1 |
| Free on Board: | FOB Dest, Freight Prepaid | | |

| VENDOR | DEPARTMENT CONTACT | | | | | | | | | | | | | | | | | | | | |
|--|--------------------|---------------------|---------------------|---------------|----|----|--------|---|----|----|--|--|----|----|--|--|----|----|--|--|---|
| Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table> | | Discount Allowed | Discount Percentage | Discount Days | #1 | No | 0.0000 | 0 | #2 | No | | | #3 | No | | | #4 | No | | | Requestor Name: Kimberly A Beckett Requestor Phone: (304) 558-5906 Requestor Email: kimberly.a.beckett@wv.gov 24 FILE LOCATION _____ |
| | Discount Allowed | Discount Percentage | Discount Days | | | | | | | | | | | | | | | | | | |
| #1 | No | 0.0000 | 0 | | | | | | | | | | | | | | | | | | |
| #2 | No | | | | | | | | | | | | | | | | | | | | |
| #3 | No | | | | | | | | | | | | | | | | | | | | |
| #4 | No | | | | | | | | | | | | | | | | | | | | |

| INVOICE TO | SHIP TO |
|---|--|
| BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE ONE DAVIS SQUARE, RM 211 CHARLESTON WV 25301 US | BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE 321 CAPITOL ST, STE 200 CHARLESTON WV 25301 US |

Total Order Amount: \$16,932,120.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE: 6/4/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: 6-5-24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

The intent is to help ensure common expectations for deliverables and services BerryDunn will provide under the Staffing Plan and SOW.

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|--------------|----------------|--------------|----------|---------------|--------------|
| 1 | 80101600 | 0.00000 | | \$0.0000 | \$180,600.00 |
| Service From | Service To | Manufacturer | Model No | Delivery Date | |
| 2024-06-15 | 2026-06-14 | | | 2024-06-14 | |

Commodity Line Description: Lead Project Manager

Extended Description:

Lead Project Manager

Hourly Rate: \$215.00

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|--------------|----------------|--------------|----------|---------------|--------------|
| 2 | 80101600 | 0.00000 | | \$0.0000 | \$259,200.00 |
| Service From | Service To | Manufacturer | Model No | Delivery Date | |
| 2024-06-15 | 2026-06-14 | | | 2024-06-14 | |

Commodity Line Description: Engagement Manager

Extended Description:

Engagement Manager

Hourly Rate: \$270.00

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|--------------|----------------|--------------|----------|---------------|-----------------|
| 3 | 80101600 | 0.00000 | | \$0.0000 | \$14,580,000.00 |
| Service From | Service To | Manufacturer | Model No | Delivery Date | |
| 2024-06-15 | 2026-06-14 | | | 2024-06-14 | |

Commodity Line Description: General Project Manager

Extended Description:

General Project Manager

Hourly Rate: \$180.00

| Line | Commodity Code | Quantity | Unit | Unit Price | Total Price |
|--------------|----------------|--------------|----------|---------------|----------------|
| 4 | 80101600 | 0.00000 | | \$0.0000 | \$1,912,320.00 |
| Service From | Service To | Manufacturer | Model No | Delivery Date | |
| 2024-06-15 | 2026-06-14 | | | 2024-06-14 | |

Commodity Line Description: Project Management Support Staff

Extended Description:

Project Management Support Staff

Hourly Rate: \$80.00



April 30, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Human Services to provide support for the West Virginia PATH Project Phase III under our contract (HHR 21*03). As stated in the SOW document, the duration of this work is estimated to be 25 months. BerryDunn agrees to a SOW start date effective on or after June 15, 2024. The work would then conclude on June 14, 2026.

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 continue provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:

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



Agreed





West Virginia Department of Human Services and Shared Administration Management Information Services

Project Management Services for the West Virginia
People's Access to Help (PATH) Project Phase III

Staffing Plan and Scope of Work

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



Submitted by:

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

Nicole Becnel, PMP®, Principal

nbecnel@berrydunn.com

Brandon Milton, Principal

bmilton@berrydunn.com

Peter Alfrey, PMP®, Principal

palfrey@berrydunn.com

Submitted On:

April 30, 2024



**Staffing Plan and Scope of Work (SOW) for the West Virginia Department of
Human Services (DoHS) and Office of Shared Administration (OSA)
Management Information Services (MIS)
Project Management Services for the West Virginia People's Access to
Help (PATH) Project Phase III**

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) and Shared Administration Management Information Services (MIS) with project management and subject matter expertise for the PATH Phase III project. This work will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 Bureau for Medical Services (BMS) Project Management Services contract between BerryDunn and West Virginia DoHS.

1.0 Introduction

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

1.1 Key Information

The State is continuing development and deployment of a system called PATH. PATH replaces three legacy systems: Recipient Automated Payment and Information Data System (RAPIDS), Families and Children Tracking System (FACTS), and Online Support Collections and Reporting (OSCAR). DoHS has requested that BerryDunn provide project management, deliverable review, testing support, organizational change management (OCM) support, requirements support, certification and compliance support, and general subject matter expertise supporting the PATH project. The following health and human services programs are supported by PATH modules:

- **PATH Family Assistance (FA)** – This module supports Medicaid, the West Virginia Children's Health Insurance Program (WVCHIP), the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance to Needy Families (TANF or WV WORKS), and many other State-operated assistance programs.
- **PATH Child Welfare (CW)** – This module supports the administration and eligibility determinations of the State's social services programs, including Child Protective Services, Adult Protective Services, Residential Licensing, and many other assistance programs.
- **PATH Child Support (CS)** – This module supports the administration of the State's Child Support Enforcement program.
- **PATH Child Care (CC)** – This module supports the administration and eligibility determinations of the State's Child Care Subsidy and Licensing programs.



All of the above programs are supported by one or more shared service modules of the PATH system. These modules support efficiency and consistency for all PATH system users.

The following background information led to the development of this SOW:

- The Patient Protection and Affordable Care Act (ACA) set in motion a significant transformation in how states determine eligibility for their Medicaid populations and enroll those populations into their Medicaid programs.
- The United States Department of Health and Human Services (HHS) supported this transformation by publishing new rules to allow states to claim 90% federal financial participation (FFP) for development activities related to their eligibility and enrollment (E&E) systems. This was further supported by an exception to the Office of Management and Budget (OMB) Circular A-87.
- On October 28, 2014, the Centers for Medicare and Medicaid Services (CMS) announced an extension to the OMB A-87 exception, which expired on December 31, 2018.
- On December 4, 2015, CMS published a final rule that, among other regulatory changes, indefinitely extended the 90% FFP for development activities related to E&E systems.
- From 2018 to present, the PATH project completed several milestones, including:
 - Review of all 2,731 contractual requirements resulting in 500 configuration workshops, demonstrations, and workgroups
 - Deployment of the Client Portal in 2020, allowing the citizens of the State to screen for assistance to Child Care, Child Support, WV WORKS, SNAP, Medicaid, CHIP, Low Income Energy Assistance Program (LIEAP), Medicare Premium Assistance, and School Clothing Allowance and apply for these programs and services, make child support payments, and report abuse and neglect
 - Deployment of all additional modules in 2023 and 2024, including the CW, CS, FA, CC, Reporting, Document Management, Administration, and Financial modules

The objective of Phase Three of BerryDunn's support of the PATH project is to provide project management services which will assist with the complete deployment of the PATH solution. Specific project objectives for the next two years include, but are not limited to:

Deployment of prioritized deferred requirements and functionality

Deployment of enhancements and modifications to achieve strategic objectives, implement new programs, and mature business capabilities

Continued success of ongoing certification and/or compliance activities



Continued resolution of high priority defects

The PATH project will also aid the State in meeting several of its goals specific to Medicaid Information Technology Architecture (MITA), such as:

Develop seamless and integrated systems that communicate effectively to achieve common Medicaid goals through interoperability and common standards.

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.

Provide timely, accurate, usable, and easily accessible data to support analysis and decision-making for healthcare management and program administration.

Coordinate with public health and other partners and integrate health outcomes within the Medicaid community.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

The State leadership team will consist of Shaun Charles and Sarah Young.

- 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 Alex Tannenbaum as Project Manager, Alex Lyubarov as Program Manager, and Brandon Milton as Portfolio Manager.
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 25 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 DoHS project sponsor.
- All project-specific Service Level Agreements (SLAs) outlined in CMA Number HHR21*03 will be applicable to this SOW.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening the State's partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and will leverage any needed tools and procedures.
- BerryDunn assumes that participating State agencies will make available their staff who have the knowledge base required to inform PATH activities as needed. BerryDunn assumes the list of participating agencies will consist of the DoHS Office of the



Secretary, the OSA, the BMS, the Bureau for Child Support Enforcement (BCSE), the Bureau of Social Services (BSS), the Bureau for Family Assistance (BFA), the West Virginia Office of Technology (WVOT), the Office of the Inspector General (OIG) and WVCHIP.

- BerryDunn will support DoHS through the Advance Planning Document (APD) processes required by CMS and other federal partners for this SOW. For this SOW, BerryDunn assumed the potential to update the APD two times.
- The cost of services and timeline in this SOW requests 25 months during the State's PATH project.
- According to the IES Request for Proposal (RFP), the primary system integration vendor is responsible for the performance of its partners; therefore, BerryDunn will work with the primary solution vendor to fulfill the services within this SOW. It is assumed that the primary solution vendor will be responsible for ensuring its subcontractor partners participate as needed to complete the services defined in this SOW.
- The level of effort defined in this SOW is based upon certification of the solution by a select number of federal partners, including CMS, Administration for Children and Families (ACF), Food and Nutrition Services (FNS), and Social Security Administration (SSA).
- The staffing, approach, and level of effort defined in this SOW are based on the requirements outlined within the State's IES RFP.
- If the State exercises the transition year of the master contract, it is assumed that the second year of services performed under this SOW will be primarily focused on transitioning tasks to the State. Additionally, the pricing for all services in this SOW will be at the 'Optional Year 1' rates.

1.3 Funding

The current Federal Fiscal Year (FFY) cost of services described in this SOW was included in the latest Implementation Advance Planning Document (IAPD) submitted to the federal partners for FFY 2024, with an estimated cost of \$13.026 million combined State and federal share per year. The total estimated cost for BerryDunn's services under this SOW is \$16,932,120 for 25 months.



2.0 Project Scope and Staffing Plan

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

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

| Ref # | Deliverable/Service, Approach, and Acceptance Criteria | Responsible | Hours Estimate |
|-------|--|---|----------------|
| 1.0 | <p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <p>There will be no Project Management Office (PMO) deliverables supplied in support of Engagement Oversight.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Nicole Becnel</p> <p>Brandon Milton</p> <p>Alex Lyubarov</p> <p>Dawn Webb</p> <p>Ed Daranyi</p> <p>Emily McCoy</p> <p>Peter Alfrey</p> | 5,530 |
| 2.0 | <p>Monthly Project Status Reporting</p> <p><i>Service Approach</i></p> <p>BerryDunn will create and submit Commissioner briefings and monthly project status reports to BMS, the DoHS project sponsors, and/or the federal partners to provide objective reporting on the health of the project.</p> <p>The details contained within the project readiness assessments are meant to provide the overall health of specific milestones, deployments, and other events. The project status reports are intended to supply higher-level reporting on the status of project</p> | <p>Brandon Milton</p> <p>Adam Bowman</p> <p>Alex Lyubarov</p> <p>Alex Tannenbaum</p> <p>Allison Marler</p> <p>Ana Petrillo</p> <p>Katie Weldner</p> <p>Lacey Cannon</p> <p>Lorrie Davenport</p> <p>Mallory Tiffany</p> <p>Mara Cooper</p> | 6,356 |



| | | | |
|-----|--|--|--------|
| | <p>deliverables, timeline, and associated project issues and risks.</p> <p>The project readiness assessments and status reports will be developed, reviewed, and finalized during the first two weeks of each calendar month for the project's life.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefings D02: Monthly Project Status Reports <p><i>Completion Criteria</i></p> <p>All parties will deem Monthly Project Status Reporting complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Neal Winn Nora Gilligan Payton Waybright Rakesh Kuttuppillil Samuel Kessler Shaun Meeks Sudha Ganapathy Tahsin Zakaria Vivian de la Gandara Hailey Holden Katie McDonald Cate Poling Kourtney Kirk Shandia Benke Morgan Krieger</p> | |
| 3.0 | <p>Project Management Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide Project Management Services for the PATH project. Upon project initiation of this SOW, BerryDunn will confirm agreed-upon expectations for the management of the project. BerryDunn Project Management Services will include:</p> <ul style="list-style-type: none"> Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn- and State-owned meetings (as requested) Management of project logs (action items, risks, issues, and decisions) Location of a project documentation repository in an agreed-upon SharePoint location <p>BerryDunn will facilitate weekly meetings with the State project sponsor and project lead to discuss project status across each project area. BerryDunn will use this time to make the State aware of project risks, issues, and/or items that may require its attention. BerryDunn will also use this time to plan risk and issue mitigation and responses.</p> <p><i>Outputs</i></p> <p>The following outputs will be produced as part of this service:</p> | <p>Adam Bowman Allison Marler Ana Petrillo Katie Weidner Lacey Cannon Lorrie Davenport Mallary Tiffany Mara Cooper Neal Winn Nora Gilligan Payton Waybright Rakesh Kuttuppillil Samuel Kessler Shaun Meeks Sudha Ganapathy Tahsin Zakaria Vivian de la Gandara Eileen Gardner Hailey Holden Katie McDonald Cate Poling Kourtney Kirk</p> | 29,104 |



| | | | |
|-----|---|---|--------|
| | <ul style="list-style-type: none"> • Meeting agendas • Meeting notes • Meeting tracking logs • Action item tracking logs • Risks and issues register • Project decision logs • Weekly workshop and workgroup coverage calendars <p>Completion Criteria</p> <p>All parties will deem Project Management Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | Shandia Benke Jonathan Pryor Katelyn Smith Ryan Daniels Morgan Krieger Muriah Nutter Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan Williams Jordan Ramsey Megan Hamilton KD Dobyne | |
| 4.0 | <p>Requirements Management Subject Matter Expertise</p> <p>Service Approach</p> <p>BerryDunn will provide overall Project Management Services to support the continued implementation of PATH project requirements. Throughout the design, testing, and implementation of additional PATH deployments, the State and BerryDunn will work with the vendor to clarify and validate the design for each deployed requirement.</p> <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn will assign leads to assist the State during the review. The leads will be the State's primary points of contact for each module area and will work with BerryDunn and the vendor to define, clarify, and test the applicable requirements.</p> <p>BerryDunn will also be responsible for meeting attendance, facilitation, and/or note-taking (when requested by the State) during discussions in which requirements may be impacted.</p> <p>Although the vendor will be responsible for conducting requirements analysis, clarifying the scope of the solution, and maintaining a requirements traceability matrix (RTM), BerryDunn will be responsible for helping ensure the RTM reflects the State and the vendor's agreed-upon solution.</p> | Agnes Beeks-Smith Darrah Ruiz Lacey Cannon Mallary Tiffany Mara Cooper Michelle Shores Milan Kelly Neal Winn Reanna Jones Sudha Ganapathy Tahsin Zakaria Tamara Batts Krista 'Rosie' Owens Morgan Krieger | 13,062 |



| | | | |
|-----|---|---|--------|
| | <p>Outputs</p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> • Action item tracking reports • Research summaries (as requested) • Impact analyses (as requested) <p>Completion Criteria</p> <p>All parties will deem Requirements Management Subject Matter Expertise complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | | |
| 5.0 | <p>Deliverable Management and Review</p> <p>Service Approach</p> <p>BerryDunn will utilize its standardized approach to monitor and provide management oversight for the quality of project deliverables, artifacts, and other work products submitted by the vendor. BerryDunn's approach will consist of the following elements:</p> <ul style="list-style-type: none"> • BerryDunn will facilitate, track, and manage vendor- and PMO-owned deliverables. Project deliverables will be stored in an agreed-upon SharePoint location. • BerryDunn will develop, review, and finalize deliverable acceptance criteria with the vendor and the State. • BerryDunn will participate in vendor-facilitated draft reviews of contract deliverables (as needed). • BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria and contract requirements. • BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables (as needed). • BerryDunn will collaboratively resolve comments on vendor-owned deliverables. • BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable. <p>BerryDunn will review vendor deliverables for quality, comprehensiveness, and alignment with project requirements. In support of this objective, BerryDunn</p> | <p>Adam Bowman Agnes Beeks-Smith Alex Tannenbaum Allison Marler Darrah Ruiz Katie Weidner Lacey Cannon Lorrie Davenport Mallary Tiffany Mara Cooper Michelle Shores Neal Winn Rakesh Kuttappillil Reanna Jones Samuel Kessler Sudha Ganapathy Tahsin Zakaria Tamara Batts Katelyn Smith Krista 'Rosie' Owens Morgan Krieger</p> | 15,980 |



| | | | |
|-----|--|---|--------|
| | <p>will work with the vendor to help ensure deliverables have approved acceptance criteria that the State has validated. BerryDunn will also work with the State and the vendor to help ensure project deliverables align with the State-approved acceptance criteria. The team will also use the agreed-upon comment logs to track identified comments in project deliverables, working collaboratively to resolve identified comments.</p> <p>Once the deliverable has been finalized, BerryDunn will create and obtain signature approval on each PMO- and vendor-owned project deliverable and milestone through a deliverable acceptance form (DAF).</p> <p><i>Outputs</i></p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> • Deliverable comment logs • Deliverable review tracking logs • Deliverable review training materials • Deliverable review Responsible, Accountable, Consulted, and Informed (RACI) Matrix <p><i>Completion Criteria</i></p> <p>All parties will deem Deliverable Management and Review complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | | |
| 6.0 | <p>Federal Review and Certification Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide overall Project Management Services support for required federal reviews and certification. This includes assisting the State with developing the approach, process, and methodologies used to manage the project and creating associated deliverables required for federal reviews and certification.</p> <p>BerryDunn will work with the State and the federal partners to identify the documentation needed to assist the State in the review and certification efforts required to complete the project. BerryDunn will also provide support services by scheduling, facilitating, and managing federal on-site visits or reviews.</p> <p>BerryDunn will provide support services to the State by leveraging and reusing the State's existing</p> | <p>Adam Bowman Alex Tannenbaum Ana Petrillo Katie Weidner Lacey Cannon Mallory Tiffany Mara Cooper Neal Winn Nora Gilligan Roshani Raghani Samuel Kessler Sudha Ganapathy Vivian de la Gandara Morgan Krieger</p> | 10,763 |



| | | | |
|-----|---|--|--------|
| | <p>functionality and processes to prevent unnecessary duplication.</p> <p>Outputs</p> <p>The following outputs will be produced as part of this service:</p> <ul style="list-style-type: none"> • Certification and Compliance templates • Certification and Compliance approach documentation • Training materials • Research summaries <p>Completion Criteria</p> <p>All parties will deem Federal Review and Certification Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | | |
| 7.0 | <p>Testing Support</p> <p>Service Approach</p> <p>BerryDunn will provide resources to assist DoHS with System Integration Testing (SIT) and User Acceptance Testing (UAT) efforts.</p> <p>Assistance during SIT and UAT is outlined as follows:</p> <ul style="list-style-type: none"> • BerryDunn will assist DoHS with the review of SIT cases and results. BerryDunn will also support monitoring SIT defects and the impacts on overall project health. • BerryDunn will maintain the UAT Plan and assist DoHS in developing UAT test scenarios. • BerryDunn will assist the State with the coordination and facilitation of UAT, tracking UAT outcomes and issues and defects identified during this testing phase. <p>To help ensure the requirements are representative of the State and the vendor's agreed-upon solution, BerryDunn's assigned leads will assist each program through the testing effort. These individuals will be the primary points of contact for each testing area and will work with BerryDunn and the vendor to define, clarify, and test each requirement's design.</p> <p>Deliverable(s) and Outputs</p> <ul style="list-style-type: none"> • D03: Updated DoHS UAT Plan | <p>Adam Bowman Agnes Beeks-Smith Darrah Ruiz Lacey Cannon Mallary Tiffany Mara Cooper Michelle Shores Milan Kelly Neal Winn Reanna Jones Sudha Ganapathy Tahsin Zakaria Tamara Batts Krista 'Rosie' Owens Morgan Krieger</p> | 16,121 |



| | | | |
|-----|---|--|-------|
| | <ul style="list-style-type: none"> Review of SIT test cases, SIT test results, and UAT test case review comment logs Review of UAT templates (e.g., test case scenarios) Delivery of UAT execution reporting (e.g., overall UAT status, defect tracking) <p><i>Completion Criteria</i></p> <p>All parties will deem Testing Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | | |
| 8.0 | <p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of APDs to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D04: IAPD D05: Operational Advance Planning Document (OAPD) <p><i>Completion Criteria</i></p> <p>All parties will deem APD Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Brandon Milton</p> <p>Adam Bowman</p> <p>Alex Lyubarov</p> <p>Alex Tannenbaum</p> <p>Mallary Tiffany</p> <p>Nora Gilligan</p> | 450 |
| 9.0 | <p>OCM Support</p> <p><i>Service Approach</i></p> <p>Organizational change is a fundamental component of most system implementations, particularly one of this size. As such, BerryDunn will work with DoHS on continuing to refine and implement the change management methodology that was implemented in Phase II. In alignment with a proven methodology, BerryDunn's approach to providing change management in its work with DoHS will occur by:</p> <ul style="list-style-type: none"> Managing Change: involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and exercising clear communication. Reinforcing Change: involves evaluating action plans, reviewing the sustainability of | <p>Adam Bowman</p> <p>Agnes Beeks-Smith</p> <p>Allison Marler</p> <p>Darrah Ruiz</p> <p>Lacey Cannon</p> <p>Mallary Tiffany</p> <p>Mara Cooper</p> <p>Michelle Shores</p> <p>Milan Kelly</p> <p>Neal Winn</p> <p>Reanna Jones</p> <p>Sudha Ganapathy</p> <p>Tahsin Zakaria</p> <p>Tamara Batts</p> | 9,252 |



| | | | |
|--|--|---|---------------------|
| | <p>change management activities, and promoting individual and team successes.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem OCM Support complete upon successful completion of the project and acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Krista 'Rosie' Owens Morgan Krieger</p> | |
| 10.0 | <p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to DoHS at project close. Additionally, the Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D06: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will deem BerryDunn services complete upon formal acceptance of Deliverable 6: Project Closeout Summary by the project sponsor or his/her designee.</p> | <p>Nicole Becnel Brandon Milton Adam Bowman Alex Lyubarov Alex Tannenbaum Dawn Webb Ed Daranyi Emily McCoy Mallary Tiffany Nora Gilligan Peter Alfrey</p> | 86 |
| Total Hours | | | 106,704 |
| Total Not-To-Exceed Cost Estimate | | | \$16,932,120 |



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 Option Year 1 in CMA HHR21*03 BMS

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

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

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

| CL Option Year 1 | Role | Rate | Project Resources | Total Est. Hours | Total Est. Cost |
|------------------------|------|-------|---------------------|---------------------|--------------------|
| 9 | EM | \$270 | Nicole Becnel | 960 | \$259,200 |
| 8 | LPM | \$215 | Brandon Milton | 840 | \$180,600 |
| 11 | GPM | \$180 | Adam Bowman | 4260 | \$766,800 |
| 11 | GPM | \$180 | Agnes Beeks-Smith | 960 | \$172,800 |
| 11 | GPM | \$180 | Alex Lyubarov | 2400 | \$432,000 |
| 11 | GPM | \$180 | Alex Tannenbaum | 2880 | \$518,400 |
| 11 | GPM | \$180 | Allison Marler | 4260 | \$766,800 |
| 11 | GPM | \$180 | Ana Petrillo | 1920 | \$345,600 |
| 11 | GPM | \$180 | Darrah Ruiz | 960 | \$172,800 |
| 11 | GPM | \$180 | Dawn Webb | 120 | \$21,600 |
| 11 | GPM | \$180 | Ed Daranyi | 480 | \$86,400 |
| 11 | GPM | \$180 | Emily McCoy | 120 | \$21,600 |
| 11 | GPM | \$180 | Katie Weidner | 1920 | \$345,600 |
| 11 | GPM | \$180 | Lacey Cannon | 4260 | \$766,800 |
| 11 | GPM | \$180 | Lorrie Davenport | 1920 | \$345,600 |
| 11 | GPM | \$180 | Mallory Tiffany | 3840 | \$691,200 |
| 11 | GPM | \$180 | Mara Cooper | 4260 | \$766,800 |
| 11 | GPM | \$180 | Michelle Shores | 960 | \$172,800 |
| 11 | GPM | \$180 | Milan Kelly | 4260 | \$766,800 |
| 11 | GPM | \$180 | Neal Winn | 4260 | \$766,800 |
| 11 | GPM | \$180 | Nora Gilligan | 1440 | \$259,200 |
| 11 | GPM | \$180 | Payton Waybright | 3840 | \$691,200 |
| 11 | GPM | \$180 | Peter Alfrey | 120 | \$21,600 |
| 11 | GPM | \$180 | Rakesh Kuttappillil | 4260 | \$766,800 |
| 11 | GPM | \$180 | Reanna Jones | 1920 | \$345,600 |
| 11 | GPM | \$180 | Roshani Raghani | 1920 | \$345,600 |



| CL Option Year 1 | Role | Rate | Project Resources | Total Est. Hours | Total Est. Cost |
|------------------------|------|-------|--|---------------------|---------------------|
| 11 | GPM | \$180 | Samuel Kessler | 4260 | \$766,800 |
| 11 | GPM | \$180 | Shaun Meeks | 3840 | \$691,200 |
| 11 | GPM | \$180 | Sudha Ganapathy | 3840 | \$691,200 |
| 11 | GPM | \$180 | Tahsin Zakaria | 3840 | \$691,200 |
| 11 | GPM | \$180 | Tamara Batts | 3840 | \$691,200 |
| 11 | GPM | \$180 | Vivian de la Gandara | 3840 | \$691,200 |
| 12 | SS | \$80 | Cate Poling | 153.6 | \$12,288 |
| 12 | SS | \$80 | Eileen Gardner | 3840 | \$307,200 |
| 12 | SS | \$80 | Hailey Holden | 153.6 | \$12,288 |
| 12 | SS | \$80 | Jonathan Pryor | 3840 | \$307,200 |
| 12 | SS | \$80 | Katelyn Smith | 3840 | \$307,200 |
| 12 | SS | \$80 | Katie McDonald | 153.6 | \$12,288 |
| 12 | SS | \$80 | Kourtney Kirk | 153.6 | \$12,288 |
| 12 | SS | \$80 | Krista 'Rosie' Owens | 3840 | \$307,200 |
| 12 | SS | \$80 | Morgan Krieger | 480 | \$38,400 |
| 12 | SS | \$80 | Muriah Nutter | 1920 | \$153,600 |
| 12 | SS | \$80 | Ryan Daniels | 3840 | \$307,200 |
| 12 | SS | \$80 | Shandia Benke | 153.6 | \$12,288 |
| 12 | SS | \$80 | Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan Williams Jordan Ramsey KD Dobyne Megan Hamilton | 1536 | \$122,880 |
| Total | | | | 106,704 | \$16,932,120 |



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. These estimates might fluctuate based on the project's status.

Table 3: Project Costs by Month

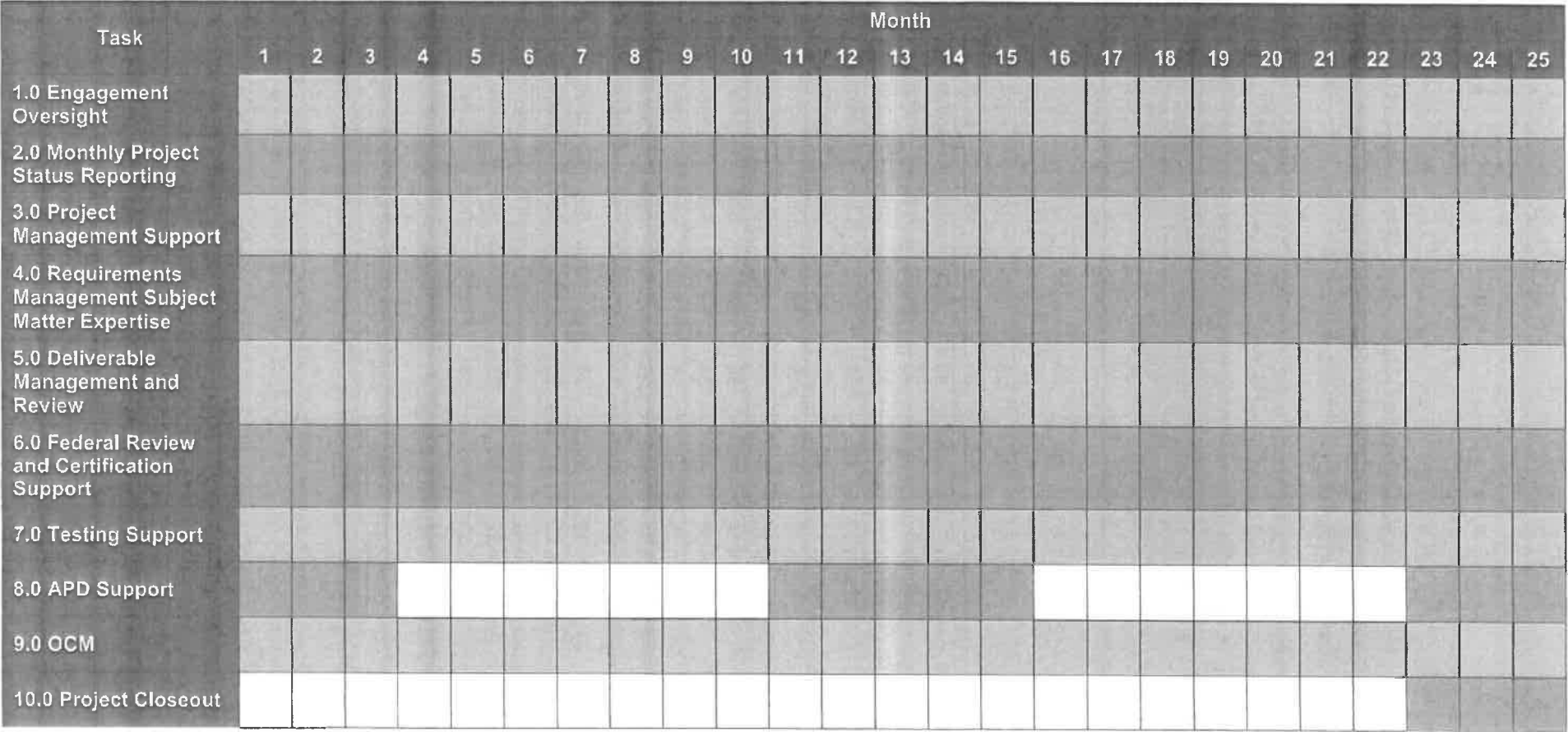
| Month # | EM Hours | LPM Hours | GPM Hours | SS Hours | Est. Hours Per Month | Est. Cost Per Month |
|--------------|-------------|--------------|---------------|---------------|-------------------------------|------------------------|
| Month 1 | 20 | 17.5 | 2367.5 | 768 | 3173 | \$496,752.50 |
| Month 2 | 40 | 35 | 3735 | 1216 | 5026 | \$787,905.00 |
| Month 3 | 40 | 35 | 3735 | 1216 | 5026 | \$787,905.00 |
| Month 4 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 5 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 6 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 7 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 8 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 9 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 10 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 11 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 12 | 40 | 35 | 3895 | 1056 | 5026 | \$803,905.00 |
| Month 13 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 14 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 15 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 16 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 17 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 18 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 19 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 20 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 21 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 22 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 23 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 24 | 40 | 35 | 2895 | 896 | 3866 | \$611,105.00 |
| Month 25 | 20 | 17.5 | 1367.5 | 448 | 1853 | \$291,152.50 |
| Total | 960 | 840 | 81,000 | 23,904 | 106,704 | \$16,932,120 |



5.0 High-Level Timeline

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

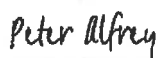
Figure 1: Proposed High-Level Timeline





BerryDunn Authorized Signature

As a principal of this firm in our Medicaid Practice Group, 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:

2DAAA44ADB3A477...

4/30/2024

Signature

Date

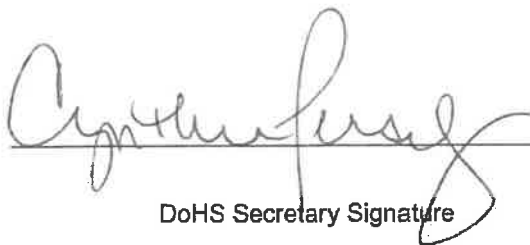
DoHS Approval of Approach, Staffing, and Not-to-Exceed Cost



Signature

5/15/24

Date


DoHS Secretary Signature

5/16/24

Date

Appendix A: Federal Clauses

Americans with Disabilities Act

This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

Drug-Free Workplace Statement

The Federal government implemented 41 U.S. Code § 8103, Drug-free workplace requirements for Federal grant recipients in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides. Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:

1. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the workplace.
2. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
3. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
4. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

Transactions subject to the suspension/debarment rules (covered transactions) include grants, subgrants, cooperative agreements, and prime contracts under such awards. Subcontracts are not included.

Royalty Free Rights to Use Software or Documentation Developed

2 CFR 200.315 Intangible property.

- a) Title to intangible property (see §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the non-Federal entity. The non-Federal entity must use that property for the originally authorized purpose and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in §200.313 Equipment paragraph (e).



-
- b) The non-Federal entity may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.
 - c) The non-Federal entity is subject to applicable regulations governing patents and inventions, including government wide regulations issued by the Department of Commerce at 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements."
 - d) The Federal Government has the right to:
 - 1) Obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and
 - 2) Authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.



Appendix B: 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 to Present)

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

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



- *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 – 05/2020)*
- *WVCHIP MCO Transition Planning (01/2019 – 07/2019)*
- *SUD Waiver Initiative: Phase III (03/2019 – 03/2020)*
- *MMIS PERM Phase II (05/2020 – 05/2021)*
- *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 – 01/2020)*
- *MMIS Fee Schedule and Edit Quality Review Phase II (01/2019 – 04/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 – 10/2020)*
- *TAPS (11/2018 – 10/2019)*
- *EVV Solution Implementation (06/2018 – 12/2019)*
- *Provider Enrollment (PEA) Year 2 (05/2018 – 05/2019)*
- *Contract Edit Fee Schedule Review (09/2017 – 09/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 – 08/2018)*
- *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 – 08/2018)*
- *Data Visioning and Warehouse RFP Development and Procurement Assistance (09/2017 – 08/2019)*
- *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 – 07/2018)*
- *Access to Care Project Monitoring Phase (03/2017 – 04/2021)*
- *Provider Re-enrollment (PEA) (03/2017 – 02/2018)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 07/2017)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
- *Income Maintenance Manual (IMM) Update (09/2016 – 09/2017)*
- *Access to Care Project (Access Monitoring Plan Phase) (04/2016 – 10/2016)*
- *Updates to WV Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 – 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment RFP Development and Procurement Assistance (10/2015 – 12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 – 03/2016)*
- *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 – 08/2017)*
- *MMIS DDI and Certification (07/2015 – 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 – 09/2015)*
- *PPACA Workgroup Oversight (2012 – 2015)*
- *5010 System Refresh (2012 – 2015)*
- *HIT Statewide Strategic Plan development (2012 – 2014)*
- *Provider Enrollment (2012 – 2015)*
- *MITA 3.0 Organizational Redesign (2013)*



▪ *Policy Workflow Assessment (2013)*

WV Department of Human Services (DoHS)

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

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

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

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

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

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

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

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



and maintain millions of dollars in federal funding.

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR 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 DHHR 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 DHHR volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 – 06/2020)*
Nicole was the Lead Project Manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC) and adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.
- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 – 10/2020)*
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and prepared an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 – 09/2020)*
Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care



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

- *Provider Management Support (07/2019 to 01/2021)*
Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 – 09/2013)*
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.



- *Provider Enrollment (PEA) Project (07/2011 – 12/2012)*
Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities, including presentations and training at Provider Workshops held throughout the State.
- *5010 Refresh Project (10/2011 to 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 frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

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

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

- **Project Management Support**

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

Presentations

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

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


Brandon Milton, MBA, PMP®

| | |
|---|--|
| Proposed Project Role: | Lead Project Manager |
| Role at BerryDunn: | Principal |
| Years of Experience Relevant to Proposed Role: | 12 years |
| Certifications and Education: | Master of Business Administration, University of New Hampshire Bachelor of Science, Business Administration and Political Science, University of Maine Project Management Institute (PMI) Certified Project Management Professional (PMP®) |

Overview

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

Experience
BerryDunn (07/2011 – present)

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

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

WV Bureau for Medical Services (BMS)

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

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

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

Brandon served as the lead project manager for the DDI and certification for the



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

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

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

- *Provider Enrollment (PEA) Project*

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

- **Missouri Department of Social Services**

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

Brandon provided project management oversight and subject matter expertise for the development of evidence packets for CMS gate reviews of MEDES. This work included identification and validation of system evidence to align with the checklist criteria from the new Medicaid Eligibility and Enrollment Toolkit (MEET) that CMS released in August of 2017.

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



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

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

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

Presentations

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



Adam Bowman

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

Overview

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

Experience

BerryDunn (10/2019 – present)

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

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

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

Adam is currently fulfilling the internal Project Management Office (PMO) lead for the PATH project. He oversees resource management, change management, and the deliverables team. He is also utilizing his programming skills to support PATH Maintenance and Operations (M&O), 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 was 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.



Agnes Beeks-Smith, CSM, CSPO

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 25 years |
| Certifications and Education: | Bachelor of Science in Physics, Spelman College CSM (Certified Scrum Master) and CSPO (Certified Scrum Product Owner) certifications |

Overview

Agnes brings extensive knowledge of Georgia, North Carolina, South Carolina and Alabama Medicaid policies and procedures. She has experience with agile methodology and sprint development; has worked with UAT (User Acceptance Testing) acceptance criteria testing for sprint releases; and served as an advisor for CCB (Change Control Board). She is knowledgeable in HIPAA (Health Insurance Portability and Accountability) X12 transactions for the processing of electronic claims, as well as state and federal government Medicaid/healthcare requirements and the MITA (Medicaid Information Technology Architecture) seven conditions and standards.

Experience

BerryDunn (10/2020 – present)

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

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

- *People's Access to Help (PATH) DDI (Design, Develop, Implement) Project Management (10/2020 – present)*

As a functional lead for WV's Child Support division for PATH project implementation, Agnes assisted with the management of requirements analysis for inclusion in scope. She aided with conducting Design Validation sessions by leading the review of functionality denoted for design documentation for BCSE (Bureau for Child Support Enforcement) Child support. She provided tracking of approvals and change requests to ensure project timelines are met, reviewed, and updated project status reporting for visual tracking purposes, and assisted with UAT scenarios from the design validation ticket review. Agnes also provided guidance to DoHS for activities and timeframes of deliverables.

Optimized Manpower Solutions (12/2014 – 10/2020)

As a senior business analyst for Alabama Medicaid, Agnes helped to ensure that MITA 3.0, MECT and Agile methodology guidelines were executed for Member Enrollment for MAGI and Non-MAGI programs. She serves as a liaison for OBC (Outcome Based Certification) for transition from E&E standards checklist requirements. Her other duties included JAD sessions,



gap analyses, interface review, development of BDDs, UAT, and user training. Certified Scrum Master and Certified Scrum Product Owner.

Globalpundits (12/2013 – 10/2014)

As a business analyst for a replacement MITA 3.0 MMIS (Medicaid Management Information System) implementation, Agnes helped to ensure that MITA 3.0, MECT and Agile methodology guidelines were executed for provider enrollment. She developed business rules for provider web portal, management, and mock screen development; performed a gap analysis of current system requirements; and was responsible for several tasks related to the provider enrollment business, system, and security rules.

S2Tech (03/2013 – 10/2013)

As an MMIS subject matter expert for Montana's MMIS implementation, Agnes helped to ensure that MITA guidelines were executed for provider, contact management and AVRS. She reviewed the State's RFP (Request for Proposal) for comprehension of test case development and gap analysis; developed test case scenarios for provider enrollment/ maintenance, contact management, web portal and AVRS; and performed various testing activities.

Hewlett-Packard Enterprise Services (02/2009 – 02/2013)

Agnes served as the contact center supervisor, responsible for overall implementation of GAXIX account call center and management of over 100 employees and contractors. This included the development of provider, member, CTMS (contact tracking management system) and auxiliary navigational and procedure manuals; coordination of training for new supervisors and implementation staff and develop of training materials; and backup for the Provider/Member Services Manager and Field Services Representative Supervisor.

EDS (Electronic Data Systems) (09/1999 – 02/2009)

- **Provider Services Supervisor (04/2003 – 02/2009)**

Agnes was responsible for the maintenance of the existing MMIS system and the development of an NPI claim team. She supervised and monitored contractual requirement performance of up to 36 customer relations representatives; performed prior approval entry for dental and optical provider; worked on file maintenance for policy updates to audits and edits for NCXIX (North Carolina Medicaid); and developed of walkthrough documentation and presentation of DABD for client approval.

- **Call Center Supervisor (09/1999 – 04/2003)**

Agnes supervised 40 call center agents, including newborn and nursing home inquiries. She developed provider inquiry agents to meet all service level requirements, coordinated training curriculum for new supervisors and implementation staff, and assisted with development of training materials.



Alex Lyubarov, MS

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Manager |
| Years of Experience Relevant to Proposed Role: | 10 years |
| Certifications and Education: | Master of Science in Computer Engineering, Dagestan State Technical University Bachelor of Science in Computer Engineering, Dagestan State Technical University MCP (Microsoft Certified Professional) PSI - Business of Health Care Providers, Payers and Life Sciences CompTIA A+ Certified |

Overview

Alex is a senior manager with more than 20 years of IT experience who has worked in various Healthcare, Government, Health and Human Services and Financial Management organizations. He has led various IT projects for project scope, requirements, budget, schedule, risk management plan, communication plan, Request for Proposal (RFP)/procurement development and other project management related tasks and has developed the ability to support clients during the Systems Development Life Cycle using Agile and Waterfall methodologies. He is adept at working in a fast-paced business environment possessing excellent communication, analytical, presentation, and leadership skills.

Experience

BerryDunn (07/2021 – present)

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

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

- *People's Access to Help (PATH) DDI Project Management (07/2021 – present)*
 Alex is currently serving as the program manager overseeing BerryDunn's Project Management Organization (PMO) team supporting the implementation project for West Virginia's Integrated Eligibility System (IES), also called PATH, to support the eligibility, enrollment, and administration of the WV DoHS's human services 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. He manages the PMO team that provides project management, certification, and compliance support working directly with Centers for Medicare & Medicaid Services (CMS) and State stakeholders. Alex also oversees Advance Planning Document (APD) submissions, deliverable review, testing support, organizational change management (OCM) support, requirements support, and general subject matter expertise supporting the PATH Design,



Development, and Implementation (DDI) project. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

- **Missouri Department of Social Services**

- *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (10/2022 – present)*

Alex is serving as the engagement manager overseeing BerryDunn IV&V team supporting MEDES.

Technology Professionals Group Inc. (11/2019 – 07/2021)

Alex worked as a senior program manager and senior business-technical consultant to support all phases of New York State Department of Health (DOH) Medicaid Data Warehouse (MDW) implementation cycle, developed customer deliverables in accordance with contract requirements and State documentation standards, and researched and provided recommendations to the client on critical business decisions. He helped on RFP/RFQ proposal responses including all aspects of document development. He also assisted leadership by providing consulting expertise in State & Local Government and Healthcare industries. He helped support daily program/project teams to support the enablement and expansion of the new and existing business initiatives.

KPMG (05/2014 – 05/2019)

Alex worked as a manager, assisting the State of Connecticut Department of Social Services (DSS) on their IES and Medicaid projects with project management and data analysis. Alex liaised between the systems integrator, IV&V and State stakeholders to help ensure the project was on time and within the budget. He also assisted on the New York State IES project, he helped develop State RFP for systems integrator vendor, in addition, he led the team of consultants to perform audit/analysis for New York County's (62) IT Systems. Alex worked as a PMO manager to lead a team of SMEs Healthcare Patient Access and Revenue Cycle assessment and implement projects for process improvements, enhance the patient experience, and reduce financial risks.

Albany Medical Health System (09/2008 – 05/2014)

Alex worked as a senior systems analyst to implement vendor purchased solutions, analyze EHR/EMR deployment, and assess needs of internal business units. He performed systems application support and provided on-site technical support for multiple environments.



Alex Tannenbaum

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Consultant |
| Years of Experience Relevant to Proposed Role: | 6 years |
| Certifications and Education: | Bachelor of Science in Business, Clemson University |

Overview

Alex is a Senior Consultant in BerryDunn's Medicaid Practice Group. He brings six years of project, resource, and client management experience to the group. Alex's positive energy, excellent organization and communication skills, and professionalism nicely complements his current work on the People's Access to Help (PATH) eligibility and enrollment project, where he is the Project Manager responsible for providing project management organization services.

Experience

BerryDunn (09/2020 – present)

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

WV Department of Human Services (DoHS)

- *People's Access to Help (PATH) (09/2020 – present)*
Currently Alex is the Project Manager for a large-scale, system implementation project directly impacting four State agencies in West Virginia. Alex oversees a 40-person team, managing a service approach for the PATH project which includes oversight, monthly project reporting, project management support, requirements management, deliverable management and review, federal review and certification support, testing support, organizational change management (OCM) support, and project closeout.

Alex is also the lead for the project's multi-program Implementation-Advance Planning Document (I-APD). In addition to submitting narrative updates for the I-APD, Alex is also responsible for updating the project's Cost Allocation Methodology (CAM), which follows the International Function Point Users Group's (IFPUG) Function Point Counting Practices Manual.

Previously, Alex served the Internal PMO Manager, where he was responsible for the management of the following work streams: Project Schedule, Project Scope, PMO Tool Management, Monthly Status and Readiness Reporting, Budget, Deliverables, Compliance, System Security, Certification, Issues, Risks, Action Items, Assumptions, Decisions (IRAAD), Audits, Project Resources, Internal Governance, and Project Communications.

Prior to these roles, Alex was the lead resource coordinator, managing the day-to-day coordination of the PMO team. Alex had a variety of responsibilities, some of which included conducting daily meetings for team organization, providing



oversight of the daily project coordination activities, developing process flows, prioritizing, and scheduling meetings to ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs), managing project Requests for Information (RFIs), and helping to ensure vendor accountability and adherence to SLAs.

- *WV Advance Planning Document (APD) Consulting Services*

TEKsystems Inc. (06/2016 – 09/2020)

- **Enterprise Account and Relationship Manager (06/2017 – 09/2020)**

Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of Traditional Software Development (SDLC and Agile), Cloud Enablement, Data Analytics, DevOps & Automation, and Digital Experience. Industries supported included Healthcare (Medicaid, IES, EMR, and Insurance), Pharmaceutical/Life Science, and State/Local Government.

Alex was responsible for securing business with new accounts to provide IT Project-based Services and IT Staffing Services and to Life Science and Pharmaceutical clients. This includes engaging new and existing customers through phone calls and meetings to promote TEKsystems as a valued partner for IT services such as deliverable-based professional services, workforce planning, and staff augmentation. He identifies new customers within a sales territory through research and networking to expand TEKsystems business opportunities; secures high-value accounts through consultative selling, effective customer solutions, and compelling business opportunities; and negotiates contracts and integrate contract requirements with business operations.

He was also responsible for relationship management, building relationships with clients to truly understand their business and analyze service growth opportunities. This has included leading the implementation of strategic business plans to address the needs of the customer to position TEKsystems as a service provider.



Allison D. Marler, MDIV, PMP®

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 21 years |
| Certifications and Education: | Master of Divinity, Moody Bible Institute Bachelor of Science in Workforce Education, Southern Illinois University Project Management Institute (PMI) Project Management Professional (PMP®) |

Overview

Allison is a general project manager with 21 years of experience in social services and Medicaid. She is highly skilled in performing problem solving tasks, conducting research analysis, and working with multiple groups to convey information and solutions. She has developed excellent interpersonal skills like organization and time management and excellent communication skills with various groups in a community. She is skilled in leadership of testing teams and has a strong knowledge base of Kanban, Scrum, and Agile.

Experience
BerryDunn (07/2021 – present)

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

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

- *People's Access to Help (PATH) DDI Project Management (05/2022 – present)*

As BerryDunn Organizational Change Management (OCM) Lead Allison leads the support of activities between state staff users, vendors, clients, providers, and stakeholders to maximize user adoption of the project system called WV PATH while adhering to critical path deadlines. This work is being completed in collaboration with the training, development, and communication teams from the state of WV business coordinators team and the training team as well as the vendor OCM team in order that state senior leaders and trainers will be equipped to serve as advocates and catalysts to drive change. Allison routinely leads meetings with the state resources and vendor staff to collaborate and carry out the OCM activities and designate tasks for completion. Allison gathers the resources necessary for OCM related activities and coordinates the scheduling with the vendor. Allison also creates and leads meeting presentations such as PowerPoints, newsletters, and other state facing presentations and materials to assist the state with informing staff of upcoming events and information related to the WV PATH project. Allison works in collaboration with the state resources, the vendor and the SPMO team to develop and collect ADKAR survey information needed to analyze and target which additional project communication efforts need



additional support for the three releases of WV PATH (Child Support, Child Welfare, and Integrated Eligibility). Allison coordinates the supports identified and needed out of necessary research analysis activities. Allison develops and maintains a system of organization to help ensure that all OCM activities are being carried out in time to support the WV business coordinators for all three releases. Allison works with the WV State Trainer Team to track and review training-related documentation and deliverables and in the communication process for coordinating meetings to review said documentation/comments. Allison participates in quality control efforts to help ensure that guidelines and timelines are adhered to.

- *Child Welfare (CW) (07/2021-04/2022)*

As Release Coordinator, Allison led the daily morning meeting with the WV State CW Business team to coordinate efforts related to the design validation process and the testing process. Allison coordinated all design validation support activities related to the WV State CW Team such as the scheduling of additional design validation meetings and coordination of meetings with the vendor or other SPMO teams. Allison led and assisted with the development of the WV State CW Weekly Touchpoint report and facilitated the weekly meeting with the WV CW Business Coordinators. Allison led design validation review meetings to review information with the CW Business Team as needed via Zoom/Teams. Allison logged change impact tickets and maintained a tracking system. Allison performed data analysis for the design validation phase and relayed this information to the CW Business Coordination team to utilize as a tool during the design validation process. Allison conducted assignment designations in SharePoint and coordinated all related activities with the vendor and the SPMO team. Allison provided team updates in daily team scrums and assisted in the coordination and completion of outstanding activities.

State of Connecticut Department of Social Services (12/2006 – 07/2021)

- *Social Services Analyst (10/2013 – 07/2021)*

Allison worked as a social services analyst to collect data for the initial business requirements for the ImpaCT project (Medicaid/Medical requirements) and participated in the Design Sessions for the Application Registration module, Data Collection module, Correspondence module, Conversion and mapping process, Fair Hearings module and Renewals module. She reviewed the Business System Design documents that came from the design sessions and submitted comments to developer for review and then participated in the review process. She researched design documents in SharePoint to write and execute scenarios for User Acceptance Testing (UAT) and documented defects discovered during testing. Allison also notified business leads of potential training issues/process bulletin needs for field offices, maintained a tracking system of open issues in JIRA, and retested open issues. She participated in the change request process, in-person meetings with the development team and business leads, and Microsoft Teams/Zoom meetings to troubleshoot issues and resolve problems. Allison led team scrums daily and collaborated with IT staff to execute scenarios such as batches, environments, interfaces, printing, and task implementation. She worked on data cleanup and conversion activities, diagnosed, and resolved eligibility processing issues; and developed process documentation and an ahCT



training guide. Allison trained other testers in scenario development, testing processes, eligibility troubleshooting matters, usage of the new integrated eligibility management system, and helped troubleshoot issues. She developed an understanding of Medicaid programs, policy, procedures, and eligibility determination in both ImpaCT and the State exchange eligibility system. In particular this required locating and analyzing both Federal and State regulations as they pertain to Medicaid programs, developing skills in quality assurance oversight for Medicaid testing, and leading a team for Medicaid UAT to help ensure the completion of tasks and test execution according to proposed deadlines.

- *Eligibility Services Worker (12/2006 – 10/2013)*

Allison worked as an eligibility services worker to obtain necessary information for the determination of services and public assistance. She researched, verified, and evaluated client statements and other documentation to help ensure compliance with program eligibility requirements. She entered, maintained, and updated all relevant case eligibility information in the Eligibility Management System database. She upheld strict confidentiality for clients and processed redetermination services to ensure correct client benefits level. Allison also assisted clients with application and receipt of federal, state, and municipal social services benefits, and acted as a community liaison with local, state, and federal agencies regarding the determination and coordination of client eligibility and awards. She informed clients, social service agencies, attorneys and the public about program details and prepared summaries and case notes accordingly. Allison represented the agency in the Fair Hearings process and maintained a working knowledge of and ability to interpret and apply relevant agency policies and procedures, as well as those of at the state and federal level. She developed a knowledge of available community support and social services resources for clients, as well as developing a knowledge base of individual/family financial practices and investments.

State of Florida, Protective Services (10/2002 – 11/2005)

Allison worked as protective services worker/foster care placement case manager to provide case work services including assessing child safety, putting preventative measures in place, preparing judicial reports, attending court hearings, and carrying out judicial orders. She developed and maintained a knowledge base of child safety practices and policies and obtained medical, physical, and social histories of clients. She conferred with clients, relatives, professional associates, community providers and other social welfare agencies regarding case problems and case management services. She also assisted in placing children with families/foster care and interpreted the results of investigations. Allison recruited and selected foster/adoptive homes and consulted with psychologists, psychiatrists, and other staff to develop and administer treatment plans. She consulted with community groups to determine appropriate referrals and develop community resources.



Ana Petrillo

| | |
|--|--|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 10 years |
| Certifications and Education: | Bachelor of Arts in Psychology, Connecticut University |

Overview

Ana is highly motivated results-driven data analyst with nine years' experience roles requiring knowledge of Federal and State welfare policies such as Supplemental Nutrition Assistance Program, Medicare, Medicaid, TFA and Child Support programs, as well as experience in project development and implementation initiatives. She has developed strong knowledge base in programming logic, validation testing, script writing and troubleshooting software as well as a knowledge of and ability to interpret and apply relevant government policies and procedures.

Experience

BerryDunn (11/2021 – present)

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

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

- *People's Access to Help (PATH) DDI Project Management (11/2021 – present)*

- Ana serves on the technical team for the project. She assists with testing efforts by developing and implementing practices and procedures for User Acceptance Testing (UAT). She helps create deliverables and provides updates to the State as needed.

Connecticut Department of Social Services (01/2012 – 11/2021)

Ana worked as a business analyst to improve improving the service delivery of various federal programs such as Medicaid for Elderly and Disabled, Medicaid for Children and Families, Medicaid Waiver Programs, Long Term Services and Support, SNAP, and State programs such as Family Cash Assistance and Cash Assistance for Elderly and Disabled. She led the team in incident investigation and mitigation, project planning, and status updates, and also assisted test team activities such as developing test plans, validating test results, tracking defects and implementing correction plans. She developed, maintained and completed the requirements traceability matrixes (RTM) and guided the integration of technical and business requirements by interpreting business requirements to various business partners and IT contractors, ensuring they were completed and validated against the Business System Design. Ana also assisted with the identification and execution of training related to Enterprise Recourse Planning system including development of functional procedures and training presentations.

She previously worked as an eligibility services worker and user acceptance tester and subject matter expert to perform testing and troubleshooting of data to ensure integrity of system execution and results against business needs. She made recommendations regarding changes to current business process documentation and assessed the impact of change implementations to current operations. Ana developed, wrote, and executed scenarios for User



Testing; provided customer support to users within assigned benefit module(s); ran troubleshoots and resolved routine problems and system issues. She served as a technical expert for federal programs such as Medicaid for Elderly and Disabled, Medicaid for Children and Families, Medicaid Waiver Programs, Long Term Services and Support, SNAP, and State programs such as Family Cash Assistance and Cash Assistance for Elderly and Disabled, and performed other related duties to support internal and external customers as required.



Darrah Ruiz

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Consultant |
| Years of Experience Relevant to Proposed Role: | 17 years |
| Certifications and Education: | Certified Achieve Global Trainer Certified IDEO Storytelling for Influence Certified IDEO From Ideas to Actions |

Overview

With 17 years of experience, Darrah is a seasoned internal consultant specializing in learning and development, business process redesign, and software development. Her background includes call center operations, leadership development, application development support, user interface (UI) design, and process re-engineering. With expertise in requirements elicitation, system monitoring, and solution evaluation, she has a comprehensive skill set developed across various industries. Recognized for impactful job skills development, engaging seminars, and end-to-end software development support, Darrah optimizes operational efficiency and drives positive organizational change. Known for fostering strong partnerships, she seamlessly transitions processes to virtual environments, showcasing a unique blend of Human Resources, Operations, and Information Technology proficiency.

Experience

BerryDunn (11/2019 – present)

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

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

- *People's Access to Help (PATH) (11/2020 – 02/2021)*

Darrah was a key contributor to the PATH Project for Child Welfare, playing a crucial role in reviewing documentation for the implementation of a new system. Darrah scrutinized system functionality and design documentation, helping to ensure precision, clarity, and alignment with stakeholder requirements.

- **State of Hawaii**

- **Department of Human Services (DHS) Med-QUEST Division**

- *Business Process Redesign (11/2019 – present) Learning and Development*

Darrah supported the Hawaii state Medicaid agency, Med-QUEST, crafting impactful job skills development initiatives, producing effective job aids, and learning handouts. Her expertise extends to facilitating in-person and virtual seminars that engage participants. She is a trusted advisor to branch administrators, front-line managers, and staff. Additionally, she established targeted communication channels for learning about newly introduced Medicaid guidelines as they impact operational processes and software logic.

- *Software Release*



Darrah offers comprehensive support for Medicaid eligibility software throughout the software development life cycle. Overhauled the release cycle process, from scope determination to on-going maintenance, enhancing efficiency. Identified and addressed specific areas needing support while creating learning opportunities. Collaborated with development vendors to improve their value proposition, strengthening partnerships. Led the transition to virtual life cycle processes during the pandemic for the division.

Department of Health (DOH)

o *Business Process Redesign (05/2021 – 07/2021)*

Darrah served as a process analyst in the transformative business process redesign implementation project for four prominent Behavioral Health Administration Divisions. She engaged in the elicitation process, demonstrating expertise in the thorough documentation, and tracking of identified requirements. Her keen diligence extended to the critical review and refinement of the overall business process, helping to ensure seamless continuity between branches.

Hawaiian Telcom/Cincinnati Bell (03/2013 – 11/2019)

• **Information Technology Services – Sr. Enterprise Business Analyst (2012 – 2019)**

Darrah successfully launched products for major clients such as HMSA, Kaiser Permanente, State of Hawaii Department of Education, DOH, and Department of Transportation, helping to ensure alignment with data requirements, timelines, and budgets. She managed the implementation of the \$250M Southeast Asia-U.S. (SEA-U.S.) Trans-Pacific Fiber Submarine Cable System, connecting Indonesia, the Philippines, Guam, Hawaii, and California. She partnered with C-Level and V-Level management to document the customer journey process using human centered problem statements to identify areas of improvement that could be measured and tracked. Darrah acted as the Scrum Master for agile projects within the internal software development team, guiding the software development life cycle and integrated Cincinnati Bell CRM system over preexisting legacy architecture for Hawaiian Telcom call centers that provide recommendations to the user based on network mapping.

• **Hawaiian Telcom Design Thinking Team (2017 – 2019)**

Darrah collaborated with a team to lead learning sessions for ad hoc internal teams, employing the design thinking methodology to address and resolve various problem statements. The program's success led to its extension for enterprise business partners like the State of Hawaii Office of Information Technology.

• **Network Operations – IP Services Group Analyst (2012 – 2013)**

Darrah engaged in close collaboration with front-line support in both field and call center environments, demonstrating a swift and effective approach to IP troubleshooting across diverse business lines and services. This includes but is not limited to VoIP, FiOptics, HSDSL, POTS, and other IP-related services. Her proficiency extends beyond immediate issue resolution as she adeptly identifies, meticulously documents, and promptly reports network risks. Darrah proactively proposed comprehensive and strategic solutions to mitigate and address these identified risks, contributing to the overall resilience and stability of the network infrastructure that meet the business rules and compliance of FCC.



Servco Pacific, Inc. (11/2006 – 02/2012)

As a Training & Development Specialist, Darrah identified and addressed departmental training needs, orchestrating sessions with documentation. She delivered ad hoc training on leadership, teamwork, customer service, and workload prioritization for individual contributors to managers and individual contributors across wholesale and retail businesses. She managed the delivery of all company surveys, consulted on in-depth analyses of survey results, and guiding action planning for each business unit. Darrah conducted comprehensive reviews and offered management assistance in formulating employee development plans. She delivered communication style (DiSC) and personality type (MBTI) reviews across in-tact teams and functional groups associated by project or initiative with the goal of building cohesiveness. At the annual Manager's Conference, Darrah designed the learning activities for 200+ participants which addressed the company mission statements and values. Darrah extended her expertise by providing valuable consulting services to front-line managers, focusing on their personal development, staff growth, and addressing human resources matters effectively.



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

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Manager |
| Years of Experience Relevant to Proposed Role: | 16 years |
| Certifications and Education: | <p>Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University</p> <p>Associate in Applied Science, Office Administration, West Virginia University</p> <p>Certified Project Management Professional (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP®)</p> <p>Certified Professional Coder, American Academy of Professional Coders</p> <p>Certified Outpatient Coder, American Academy of Professional Coders</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p> |

Overview

Dawn is a manager in BerryDunn's Medicaid Practice Group, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has over 25 years of experience in medical claims processing and revenue cycle management, including over eight 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)**

- *Quality Improvement Initiatives Portfolio Management (05/2019 – present)*
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, Payment Error Rate Measurement (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)*
- *Advanced Planning Document (APD) Assistance (05/2018 – 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.
- *Payment Error Rate Measurement (PERM) Project (05/2018 – present)*
Dawn serves as the project manager for the PERM project, managing budgets and project deliverables and working closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.
- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*
Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and to provide analysis of cost savings opportunities for BMS.
- *TPL Procurement (05/2019 – 03/2022)*
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**



- *Medicaid Organizational and Business Process Redesign (11/2021 – June 2022)*
Dawn supported the MDQ in PERM corrective action planning and response.
- **State of Alaska, Division of Legislative Audit (DLA)**
 - *National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)*
Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.
- **United States Virgin Islands (USVI)**
 - *Project Management and APD Support (10/2022 – present)*
Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.

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.

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

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

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



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

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

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

Acordia National (12/1994 – 05/1996)

Dawn began her career as a claims examiner.



Eduardo “Ed” Daranyi, MEd, PMP®

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

Overview

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

Experience
BerryDunn (09/2005 – present)

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

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

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

- *Engagement Manager (2012 – present)*

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

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



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



(08/2015 – 08/2018)

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



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

- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
As engagement manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 – present)*
Ed has been the engagement manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and bureau structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DoHS goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Data Visioning and Warehouse Development and Procurement Assistance (2012 – present)*
Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the DW/DSS, develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DoHS databases and systems.



In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DoHS in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DoHS.

- *QA Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)*
Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed also focused on establishing and assisting in the management of change management processes and participated in the certification process and report process development.

WV Department of Human Services (DoHS)

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

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

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

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

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

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

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

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

- *Independent Audit of the State IT Services EPMO (04/2007 – 06/2007)*



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

Martin's Point Health Care (2005 – 2007)

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

Goold Health Systems (1999 – 2005)

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

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

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

- **Maine DHHS (05/2001 – 01/2002)**

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

Electronic Data Systems (1985 – 1988)

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



Presentations

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

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

Moderator, MESC Conference sessions (2015-2019)

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

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

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



Emily E. McCoy, RN, BSN, PMP®

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

Overview

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

Experience
BerryDunn (07/2016 – present)

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

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

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

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



- *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*
Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
- *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*
Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services (DMAHS)**
 - *MMIS Modernization (7/2022 – 12/2023)*
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
 - *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA**
 - *Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 – 04/2017)*
Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

West Virginia Department of Health and Human Resources (DHHR) (11/2013 – 06/2016)



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

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement
- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.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 care to individuals with neurological conditions. Specific duties included:

- Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
- Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
- Serving as a representative on the Standards and Practice Council and Procedures sub-committee
- Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
- Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients

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

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



Katie Weidner

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 16 years |
| Certifications and Education: | Bachelor of Arts in Psychology, Hastings University |

Overview

Katie is a highly skilled, analytical leader with over 16 years of experience in a variety of state government positions, including most recently, working to innovate and transform compliance-based service systems to outcome-based, person-centered systems based on self-determination, dignity and choice. She is highly knowledgeable in Medicaid 1915 (c) and Child Welfare performance metrics, data collection design and quality/outcome-based service systems. She has served as a subject matter expert in state regulations, CMS Final Settings Rule, Structured Decision Making (SDM) safety model, and Child Welfare with an understanding of federal regulations and service systems.

Experience

BerryDunn (12/2021 – present)

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

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

- *Eligibility and Enrollment Implementation Assistance (01/2022 – present)*
As a consultant, Katie serves as the Organizational Change Management (OCM) team lead on the WV People's Access to Help (PATH) Project. She manages the identification, development, and implementation of organizational change management and operational readiness activities.

State of Nebraska Department of Health and Human Services (DHHS), Division of Developmental Disabilities (09/2005 – 11/2021)

- *Quality Administrator (02/2021 – 11/2021)*
Katie planned, organized, and directed the work of the quality and compliance/reporting teams (18 total staff), including ensuring all assessments, compliance checks, and required Federal (372 reports and Evidence Reports) and State reports (legislative reports, etc.) were completed timely, accurately, and are of acceptable quality. She guided supervisors in decision-making and performance improvement, assuring that challenges affecting the overall health of the program and division are conveyed to appropriate persons in a timely manner, and a wide array of duties as assigned by the Division Director and Deputy Directors. She assisted in the writing and implementation of the Division's Medicaid 1915(c) waivers, particularly as it related to sub-assurance performance measures and the Quality Improvement Strategies. She ensured that necessary data for sub-assurance performance measures was made available, was accurate, and met the scope of each measure. She made changes to improve data



collection throughout the life of the waivers. Katie also led and directed the work of the Alternative Compliance Committee, oversaw the Quality Improvement Strategy for the four Medicaid Home and Community-Based Services 1915(c) Waivers, and managed a major contract that required working with the contractor to develop and implement strategies.

- *Provider Relations Program Manager (01/2017 – 02/2021)*
Katie worked as the administrator of the Performance team for the Developmental Disabilities Home-and-Community-based Services. She managed resources necessary to operate and maintain assigned program function(s) including employee time resources, developed and/or revised the assigned program and project operating policies, procedures and objectives within agency and regulatory guidelines, and coordinated program services with other State agencies including the Division of Public Health, the Division of Medicaid and Long-Term Care, and the Division of Children and Family Services, as well as external provider service agencies, individual providers, individuals receiving services, and stakeholders.
- *Adult Protective Services/Child Protective Services Program Specialist (02/2015 – 01/2017)*
Katie provided case consultation to Children and Family Services (CFS) Staff on Adult Protective Services, SDM, transition aged youth concerns, and ongoing Child Protective Services policy and procedure. She collaborated with DHHS legal in the review and interpretation of federal laws, state statutes, and regulations in order to develop program policy and procedures. She analyzed and prepared data to write federal and state reports, performed quality assurance analysis, and developed program improvement plans and processes. Katie researched established best practices and made recommendations for quality program service delivery. She developed work plans and collaborated with internal and external customers in implementing new and enhanced practices, and provided technical assistance and training regarding the program rules, regulations. She created and conducted training sessions to internal staff regarding new policies and statutes, as well as outreach sessions to external customers including private organizations, attorneys, and the general public on the various aspects of Adult Protective Services, Mandatory Reporting, and prevention activities. She drafted new or updated APS and CPS Policy and Procedure memorandums and conducts all necessary research regarding best practice, lawfulness, adherence to regulations, and other change-related aspects related to the policy.
- *Program Accuracy Specialist (01/2013 – 02/2015)*
Katie reviewed assigned Quality Assurance tools and provided feedback to the Children and Family Services staff. She utilized extensive knowledge in her initial assessment and ongoing case management policy and practice as well as her knowledge of alternative response, intake, and inter-rater reliability practices. She contributed to the Continuous Quality Improvement (CQI) process including serving on and attending CQI sub-groups. She monitored trends to track and identify solutions for divergences, reviewed and analyzed data reports and case management files, and performed monthly and quarterly reviews. She assisted in the development of quality assurance tools that were applied in day-to-day case management review to ensure compliance with federal



outcomes.

- Other positions Katie held include:
 - *Child and Family Services Specialist (03/2009 – 01/2013)*
 - *Children and Families Outcomes Monitor (01/2011 – 03/2012)*
 - *Human Services Treatment Specialist (09/2005 – 02/2009)*



Lacey Cannon, MA

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 13 years |
| Certifications and Education: | Master of Arts in Cyber Security, American Public University Systems Bachelor of Arts in Information Systems & Security, American Public University Systems Bachelor of Arts in Kinesiology, University of Texas at Arlington |

Overview

Lacey is a project management consultant and technical subject matter expert (SME) with over a decade of experience working with enterprise technology and state & federal governments. With more than 6 years of experience with Medicaid, she is a proven leader who has excelled as a technical SME and demonstrated her ability to take on additional tasks as the Child Welfare (CW) Maintenance and Operations (M&O) Lead.

Experience

BerryDunn (10/2022 – present)

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

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

- *People's Access to Help (PATH) Project (10/2022 – present)*

Lacey works as a technical SME on the project's Technical Team, providing support and guidance to the overall project management team in the technical aspects of Health and Human Services (HHS) program management areas for Child Welfare (CW), Child Support (CS), and Integrated Eligibility (IE). Software Development Lifecycle (SDLC) responsibilities include: Master Data Management (MDM), Data Conversion, Data Cleanup, Interfaces, Batches, Technical Deliverables, Security, and System Architecture. In this role, Lacey also researches, reviews, and analyzes a broad spectrum of Policy, IT, and Security related areas of the Medicaid enterprise. As a technical SME, she facilitates and coordinates the technical aspects required for end-to-end implementation of the IES solution. This includes proactive planning, coordination, validation, and successful implementation of all interfaces and batches required for the new PATH system. Lacey works closely with the IES functional and technical business partners, IES vendor, trading partners, SMEs, and technical support teams to identify, track, and resolve issues/risks.

Lacey has also taken on CW M&O lead work, including CW Maintenance Release support to Optum and the State, reviewing of all M&O processes to include patching and hotfixes, coordinating communication to the stakeholders within the



State for downtime, submitting communication to stakeholders regarding events weekly, and helping to ensure proper tracking and prioritization of CW related incidents, problems, change requests, and defects.

State of West Virginia, Office of Management Information Services (OMIS) (03/2021 – 10/2022)

- *Information Systems Specialist III (01/2022 – 10/2022)*
Lacey supported Department of Health and Human Resources (DHHR) employees across multiple bureaus, including by not limited to: BMS, BFA, BSS, BCSE, and BPH. She was responsible for statewide implementation support and creation of all Google Drive Permissions using Active Directory and also supervised Google Migration Team working with counties statewide. She helped to ensure all counties' drives migrate successfully, considering all business impact assessments and programs or databases unable to migrate. She developed knowledge in information systems and security, as well as state, federal, and privacy agencies for DHHR statewide.
- *Information Systems Consultant I (03/2021 – 01/2022)*
Lacey reviewed contracts and procurement documents and oversaw unit needs of the unit when Director was absent. She developed strategies within OMIS, and interdepartmentally as systems intersect, advising MIS on available Windows OS systems and processes to meet needs in a cost-effective way. She served as the Google Migration Team Lead, working with counties statewide, and ensured all counties' drives migrate successfully, considering all business impact assessments and program or databases unable to migrate.

United States Navy, COVID-19 Watch Floor Team (07/2020 – 12/2020; 04/2021 – 06/2021; 01/2022 – 02/2022)

Lacey served as a Lead Training Petty Officer/SharePoint Administrator to provide software support, granting and overseeing sponsored users' access to database tracking positive COVID cases serving 11 task forces, 20 departments, and 100+ tenant commands. She tracked daily COVID cases for the Area of Operation and Reported positive cases directly to Operational Navy. Lacey compiled and created Standard Operating Procedures with all technical information and created non-technical user-friendly document for Fifth Fleet Covid-19 Watch Floor Team to use the SharePoint site and OPNAV regional tracker. She also trained users and delivered software support via system troubleshooting and technical support, tracked and resolved user SharePoint access issues, analyzed daily user activity, and identified process improvements to benefit end-user workflows. She delivered system troubleshooting and technical support, tracked and resolved user SharePoint access issues, analyzed daily user activity, and identified process improvements to benefit end-user workflows.

State of West Virginia, DHHR (02/2020 – 03/2021)

Lacey served as a Case Management Specialist to create, maintain, and update electronic case management in the system Vertiq. She completed system queries to conduct quality analysis and quality control of 10+ cases per week and served as SEGRA (VOIP) Phone Systems Administrator responsible for installing office hardware, assigning permissions, setting phone



number assignments, and providing end-user training and support. She trained employees on setting up and using VPN, and Microsoft Office, and provided PC support and training to new hire Case Management Specialist.

AdventHealth HR Talent Acquisitions (0/2019 – 01/2020)

Lacey served as a Preboarding Specialist to coordinate scheduling, appointments, and correspondence with candidates. She executed transitions to prepare electronic records for hiring, maintained broad knowledge of company policies and benefits plans to orient new hires, prior to hire date, and participated in activities designed to improve new hire/ employee preboarding process. She helped to ensure compliance with state and federal regulation, and local facility accreditation agencies. She identified and escalated problems to assigned recruiter as they occurred and took appropriate steps to resolve issues.

AdventHealth Shared Services (11/2018 – 09/2019)

Lacey served a Human Resource Representative to maintain knowledge of federal, state, and local employment law related to functional areas. She de-escalated situations using effective communication techniques, involving supervisors as necessary. She demonstrated strong organizational skills, including the ability to prioritize and manage multiple projects while adhering to service level agreements and other tight deadlines, and maintained employee privacy; followed defined standard and protocols for security and confidentiality. Lacey assisted Managers, Directors, Executive Directors, HR Managers, HR Business Partners, and other levels of leadership with HR related inquiries.

Texas Health Huguley Hospital (01/2016 – 11/2018)

Lacey served as a Patient Access Representative to schedule patient appointments and process them through admissions. She prepared financial statements and processed patient payments, posted to patient accounts, and processed billing and collections. She worked with Medicaid Billing, Authorizations for Medicaid, and other major insurance providers, and verified Medicaid and other insurance providers.

Navy Joint Reserve Base (11/2016 – 09/2017)

Lacey served as Regional Medical Department Representative to support and train 56 Navy Corpsman in multiple systems which include MRRS an aggregating database, with links to authoritative database NISPS and DOD database system NROWS. She created a database in MS Excel to track medical records and created reports regarding SLAs for shipment times and arrivals.

JonesLang LaSalle (01/2016 – 10/2016)

Lacey served as an Administrative Assistant to prepare statistical reports, narrative reports, and graphic presentations for information processing using MS Excel, filed, and retrieved corporate documents, records, and reports.

First Command Financial Planning (12/2013 – 05/2015)

Lacey served as Paraplanner, Auditor, and Team Lead to use automated data systems to analyze production levels to provide standard and progress reports for clients and Financial



Advisors. She provided training for Financial Advisors nationwide on how to use specific proprietary software for creating and presenting client financial reports.

Fidelity Investments (03/2012 – 12/2013)

Lacey served as a Brokerage Operations Representative to deliver customer service to clients ranging in assets from \$20K to multi-millions. She developed in-service educational materials, set-up policies and procedures for office, and provided analytical support to analyze employee productivity, system activity, and client account issues processed by creating complex MS Excel reports using VLOOKUP, Pivot Tables, and Charts to management and Senior Directors.

Accurate Medical Equipment (12/2009 – 10/2011)

Lacey served as a Customer Service Representative to process Durable Medical Equipment orders, verify insurance to include Medicaid and other insurance providers, and obtain authorizations for Durable Medical Equipment to include authorizations with Medicaid and other insurance providers. She helped to ensure billing compliance with Medicaid and other insurance providers.


Lorrie Davenport, MBA, CPUR

| | |
|--|--|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 27 years |
| Certifications and Education: | Master of Business Administration, Southwest Texas State University Bachelor of Business Administration, Concordia University Bachelor of Psychology, Texas A&M University Certified Professional in Utilization Review |

Overview

Lorrie Davenport brings more than 27 years of healthcare and Information Technology (IT) experience including provider relations for Medicaid and Medicare programs, executive oversight, complex technology implementations, hospital administration, fraud and abuse, utilization review, and operations management.

Experience
BerryDunn (08/2013 – present)

Lorrie Davenport has served as a general project manager with BerryDunn, supporting the following projects:

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *West Virginia PATH (People's Access To Help) Integrated Eligibility System (IES) – IES Design, Development, and Implementation (DDI) (2/2018 – present)*
 Lorrie has been providing project management, subject matter expertise, and thought leadership in multiple leadership roles across the PATH IES DDI project. Lorrie and her teams provide oversight and review of deliverables for the DDI project to ensure compliance with requirements and deliver a quality product to the State. She is the Organizational Change Management (OCM) and Training Team Manager providing oversight and compliance for vendor training activities. This oversight includes strict monitoring and adherence of the vendor to meet project timelines and critical path dates in the schedule. Her team develops the OCM Plan deliverable and oversees the activities and tasks of the OCM Plan such as administering Awareness, Desire, Knowledge, Ability and Reinforcement (ADKAR) surveys across all project releases for delivery to the State and DoHS. Lorrie also serves as the State Project Management Office (PMO) Child Welfare Release Manager, which was successfully implemented in January 2023. She collaborated closely with the vendor and the State Business Coordinators on meeting critical project milestones and identifying risks/issues associated with the schedule and mitigating the impact on the project. Lorrie also assists the State with oversight of



the Maintenance & Operations (M&O) phase for the two releases that are live in PATH.

WV Bureau for Medical Services

- *MMIS DDI (08/2013 – 10/2016)*

Lorrie provided project management, subject matter expertise, and thought leadership on the MMIS DDI project. Lorrie draws upon her extensive experience with MMIS implementations to share lessons learned and best practices that aid in risk identification and strategies for mitigation, resulting in time and resource efficiency for this project. She has been a driver of many key project management strategies for the MMIS that have resulted in improved quality deliverables, increased oversight in requirement traceability, and additional dashboard reporting for the Bureau. She has been a key player in identifying and developing acceptance criteria for deliverables and milestones as well as a key reviewer of Molina's deliverables. Her knowledgebase is flexible enough to allow her the ability to 'get into the weeds' in design documents and DDI discussions, provide input into CMS certification, and engage at executive levels regarding risk/issue/mitigation and project management oversight. Lorrie worked with Molina as a Subject Matter Expert (SME) on identifying artifacts to meet CMS certification checklist criteria during each phase of the pilot. She assisted with State SME and leadership preparations for CMS demonstrations and on-site visits.

- **New Jersey (NJ)**

- *New Jersey Leverage & Reuse Medicaid Management Information System (MMIS)/DHHR – MMIS DDI (11/2016 – 1/2018)*

Lorrie provided project management, subject matter expertise, and thought leadership on the MMIS DDI project. Lorrie leveraged her WV MMIS certification experience and brought lessons learned to the NJ MMIS DDI project. Coming off a successful CMS pilot certification with Centers for Medicare & Medicaid Services (CMS) in WV, with the shared vendor Molina Healthcare, she was able to share the nuances and steps taken to achieve a successful certification.

Hewlett Packard (HP) Enterprise Services (formerly Electronic Data Systems) (11/1996 – 06/2012)

Lorrie worked on the following projects and internal initiatives while employed with HP Enterprise Services:

- *Plano Support Center (05/2010 – 06/2012)*

As a Solution Architect, Healthcare Consultant, and Business Process Optimization SME, Lorrie contributed to HP's enterprise architecture strategy, applications, and Commercial off-the-shelf software (COTS) design; led a team of 30 solutions professionals in tasks such as gap analysis, business process review, mapping of requirements for traceability and solution input, and oversaw technical architecture, design, hardware/software components, resources, and interoperability during the end-to-end solution integration. Her work with HP has given her experience with large scale databases such as member eligibility, provider, claims engines, Data Warehouse, and tools such as Microsoft SQL and Oracle, as well as experience designing solutions for SOA, n-Tier architecture, and UNIX environments.



- *Connecticut interChange Implementation (10/2005 – 05/2010)*

As the Implementation and Operations Provider Services Manager, Lorrie led provider relations, publications, Internet portal, provider and client call centers, electronic data interfaces, quality assurance, and training of 6,000 providers and 250 state employees annually. She directed operational readiness testing and preparation for CMS certification, and developed and implemented the State's first online secure web portal and enrollment wizard and the first member toll free call center. This position gave her experience in solution and project designs in accordance with CMMI, PMI, PMBOK®, Project Life Cycle (PLC), SDLC, Microsoft Project, and the International Organization for Standardization (ISO). She served as a Subject Matter Expert in web portal design, call center technology, business process optimization services, back-office support, print/imaging, workflow, and Customer Relationship Management (CRM); and consulted as a provider and member data and business process SME for new and add-on logos. Her expertise in HIPAA, ANSI ASC X12 EDI Transaction Set Standards is bolstered by experience with healthcare informatics solutions for the ACA, ACO, HL7, and EMR.

- *Account Operations for Medicare Part B (09/2001 – 10/2005)*

As the Northern Operations Site Manager, Lorrie monitored EDS' adherence to CMS requirements and collaborated with external and internal customers, including CMS, the Office of Inspector General, the Office of the Attorney General, the U.S. DHHS, the Social Security Administration, providers, vendors, and beneficiaries. She directed activities of the tri-states Maine, Vermont, New Hampshire provider call center and quad-state Maine, Vermont, New Hampshire and Massachusetts beneficiary call center, implemented an enhanced voice-response system, developed and implemented a call center training program that blended provider and beneficiary skill sets to maximize resources while reducing training time from ten to five weeks, and implemented a training program for a customer service organization, in preparation for a successful ISO certification.

- *Account Operations – Fiscal Agent, Medicaid (11/1996 – 09/2011)*

As the Provider Services Manager/Interim Provider Services Director for the Austin, Texas office, Lorrie designed and managed provider legislative projects and managed a budget of \$6.5 million for education and outreach to 75,000 providers of Medicaid and chronically ill and disabled children. She worked with associations and key provider communities to complete the legislative reenrollment mandate; provided status reports to the Medicaid Director, Medicaid Bureau Chief, and legislative offices; was a frequent guest speaker at the Texas Medical Association, Texas Hospital Association, and Mental Health and Mental Retardation meetings; designed specifications and testing plans for implementing NPI; piloted an electronic enrollment and reenrollment application on the Medicaid website; and directed the provider enrollment, provider file maintenance, policy, publications, and provider outreach teams.

- Lorrie also served as a Quality Analyst for the State of Texas Access Reform (STAR) Managed Care Program (Medicaid) managed care roll out. In this position, she designed, implemented, and analyzed the results of a provider satisfaction survey for Quality Assurance Reform Initiative (QARI) standards; analyzed healthcare data; and served as an auditor on the state's readiness committee that determined Health



Maintenance Organization (HMO) plans' status and capabilities before entering the HMO STAR Medicaid network.

Magellan Health Care /Hospital Division (05/1986 – 11/1996)

Lorrie served in several leadership roles during her ten-year tenure with Magellan Health, including Deputy Hospital Director, Joint Commission Accreditation Lead, Director of Utilization Review/Case Management/Medical Records, and Cognitive Behavioral Therapist.


Mallary K. Tiffany

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 13 years |
| Certifications and Education: | Bachelor of Science in Operations Management, Southern New Hampshire University Associate of Applied Science Business Information Management, Broome Community College |

Overview

Mallary works as a consultant in the Medicaid Practice Group with experience in customer care, employee development and training, and account coordination. She has developed a mastery of Total Quality Management Tools. She has over 7 years' experience mentoring and training, including the implementation of market-wide training to employees. She also has extensive experience in generating, analyzing, and auditing various reports for multiple departments including forecasting call center staffing.

Experience
BerryDunn (07/2021 – present)

Mallary serves as a consultant in BerryDunn's Medicaid Practice Area.

- **State of West Virginia (WV)**
 - **WV Department of Human Services (DoHS) Bureau for Medical Services**
 - **People's Access to Help (PATH) (07/2021 – present)**
Mallary is the functional manager for the Integrated Eligibility (IE) release, supporting the Medicaid, Child Care, and Family Assistance programs. Her responsibilities include project management, analysis, and team leadership. She facilitates daily, weekly, biweekly, and monthly meetings with DoHS. Mallary leads the IE Design Validation Team in compliance of contractual agreements. Her work includes validation of Medicaid, Family Assistance, and Child Care requirements, deliverable reviews, and training/maintenance/operational activities.
- **Oregon Health Authority**
 - **CareOregon Change Management Consulting (02/2022 – 08/2022; 12/2023)**
Mallary assisted the project lead in HR Strategic Planning with BerryDunn. Mallary's responsibilities included scheduling meetings, note-taking, and facilitation of work sessions. She also was responsible for maintaining the confidential SharePoint site, and developing organizational charts shared between CareOregon and BerryDunn.
 - **Health Promotion Chronic Disease Prevention (HPCDP) Section Culture Change Management with Trauma-Informed Approach Project (05/2022 – 06/2022; 05/2023 – 07/2023)**



Mallary assisted the project lead with facilitation of work sessions, scheduling, correspondence, and note-taking.

Baril Corporation (05/2018 – 06/2021)

Mallary worked as an account manager to oversee, design, develop, and manage projects within the organization. She communicates the status of projects and orders with team members and customers to help ensure timelines are met. Additionally, Mallary supports leadership with business goals and objectives in marketing, sales, operations, engineering, and quality.

Charter Communications LLC (09/2012 – 05/2018)

Mallary worked in various positions. As a customer care representative, she provided support and enhanced customer interactions with efficient communication and timely responses. As a resource management specialist, she monitored call volume to provide real time analysis, which included reporting and tracking of any staffing issues, abnormal changes in call volume, and any performance metrics that impacted the business. Mallary worked as a customer care supervisor to conduct hiring interviews, provide regular coaching, and extract data from the data warehouse monitor, track, and assess employee performance. As a customer care analyst, she performed operational testing to ensure process changes and updates met standards. Her final position as a workforce management administrator required that she oversee workforce management scheduling, reporting, and auditing functions. She also managed resources required to meet optimal service level standards and developed extensive reporting illustrating staffing and adherence effectiveness and opportunities at individual, team, and center levels.

Nationwide Credit Inc. (10/2009 – 09/2012)

Mallary worked first as a customer service representative to provide customers with optimal payment options. She then worked as a call center supervisor to handle escalated calls from customer care agents, and then provide tangible feedback to their reporting managers. She also conducted team training, mentoring, and coaching on a consistent basis. As a unit manager, she reported directly to the Director of Operations with a daily analysis of agent performance and provided one on one coaching to subordinates that encouraged performance improvement, and goal development.



Mara Cooper, MM

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 20 years |
| Certifications and Education: | Master of Management, concentration in Human Services Nonprofit Management, Shorter University Bachelor of Science in Interdisciplinary Studies, Shorter University |

Overview

Mara brings over 20 years of experience to projects, demonstrating expertise with project management, vendor management, quality control, and budget planning, especially within the Medicaid Systems and Childrens Health Insurance Program (CHIP) realms. Her strong leadership skills and deep knowledge across multiple project areas allow her to excel and lead in project areas such as planning, communication, implementing recommendations, and helping redefine processes to better serve clients. Mara exhibits heightened proficiency with medical billing, meeting facilitation, forecasting, and creating and maintaining diverse client and vendor relationships within the public and private sectors. Mara's familiarity with managing large-volume projects makes her a valuable resource on any project. Mara's recent accomplishments include working with the State of Florida to assist in the allocation of critical CARES Act funding.

Experience

BerryDunn (05/2021 – present)

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

WV Department of Human Services (DoHS) Bureau for Medical Services

- *People's Access to Help (PATH) DDI Project Management (05/2021 to present)*
As an Integrated Eligibility (IE) Release Coordinator on the WV PATH project, Mara is responsible for facilitating effective communication between State, SPMO, and Optum. She is the organizational point of contact for the team and helps ensure timely assignment and completion of all design, development and implementation (DDI)-related tasks. She also collaborates daily with the various IE program business coordinators and subject matter experts to ensure project, sponsor, and stakeholder needs are met. Specific programs Mara support include Medicaid, Child Care, and Family Assistance.

North Highland Consulting (09/2020 – 04/2021)

Mara helped to ensure that county agencies in Florida expensed or encumbered \$8.3 billion allocated by the State of Florida in CARES funding during the covered period. She served as liaison between the State of Florida Division of Emergency Management, assigned counties, Horne, and North Highland. She also provided guidance to the counties on how to best allocate



Coronavirus Relief Funds; identified and reported any issues or deficiencies that may have affected the counties' Phase 1 and 2 advanced funds as well as Phase 3 reimbursement funds; and helped ensure that counties met all deadlines as assigned by the State of Florida Division of Emergency Management.

Systems and Methods, Inc. (07/2016 – 02/2020)

- **State Disbursement Unit Child Support Program Director (06/2017 – 02/2020)**
Mara monitored and controlled all activities related to child support disbursement operation, ensuring projects were completed on time and in budget. She served as liaison between FL Department of Revenue, Clerk Courts and Comptrollers, and SMI; utilized ITIL standard for Change Management practices; Analyzed and oversaw \$10 million in annual revenue; contributed to the development and implementation of process improvements and best practices; and created project agendas and project team objectives, responsible for reporting KPIs to state partners.
- **Deputy Project Director of Customer Service and Operations (02/2017 – 06/2017)**
Mara assisted the SDU Project Director with planning, leading, controlling, monitoring, and executing all aspects of the Child Support SDU project. She oversaw and managed all activities related to FLSDU operation, helping to ensure projects were completed on time and in budget, responsible for reporting KPIs to state partners. She effectively led the Operations Department to process 100% electronic and paper collections daily with a 99.98% accuracy rate. This included forecasting Operations and Customer Service production volume.
- **Operations Manager (07/2016 – 02/2017)**
Mara oversaw and ensured compliance for the SOC audits and all aspects of balancing and preparing for bank deposits each business day. She streamlined operational processes to ensure all daily tasks were appropriately carried out; established operational objectives, work plans, assignment delegation to department supervisors, and forecasted staffing to ensure timely processing of child support payments; and analyzed multi-sourced data to decrease misapplies and increase productivity.

Xerox Federal Government Solutions/DOL Workers Compensation (12/2015 – 03/2016)

As a customer care supervisor, Mara was responsible for coordinating and leading a team of 66 call center agents, 2 customer service leads, and an additional 30+ indirect reports to achieve maximum performance to ensure service level agreements (SLAs) were met in a high-volume call center medical billing environment. She established operational objectives, work plans, and delegated assignments to department leads; resolved escalated medical billing claims and customer service issues to reduce customer complaints; and forecasted call volume for Tier 1, Tier 2 and Tier 3 Customer Service Calls.

Xerox State Enterprise Solutions/State of Florida State Disbursement (01/2011 – 01/2015)

As an interdepartmental manager, Mara aligned with multiple department managers to ensure proper inter-department workflow, prepared flow charts and process maps to determine staff needs and SLA agreements. She troubleshooted and supported Cherwell ticketing system,



proactively managed changes/issues or enhancements to the system and monitored client change requests, and revitalized SDU call center operations within 1 month of taking over call center operations. In addition, she prepared efficiency reports for SLA, statistical data, and staffing analysis for State of Florida, forecasted call center and payment processing volume via historical data for service continuity, and collaborated with senior management to establish and carryout strategic plans and objectives.

Xerox Government Healthcare Solutions/Florida Healthy Kids (01/2010 – 01/2011)

Mara supervised an elite group of quality analysts, process auditors, and quality control specialists. She performed quality control on enrollment applications and referrals to Medicaid based on expected sample size, troubleshoot and supported Cherwell ticketing system, and performed internal and external calibrations once per week with State partners to ensure accuracy of eligibility by auditing one new application, redetermination and supporting document per session. Mara also developed, implemented, and led key process improvement efforts and influenced cross-functional efforts between members of ACHA and DCF.

Xerox Government Healthcare Solutions/Florida Healthy Kids CHIP (06/2008 – 01/2010)

Mara oversaw team of data entry operators to determine eligibility for all programs under the Kidcare umbrella (i.e.,) Medi Kids, Healthy Kids, Childrens Medical Services [CMS]) Title XXI services. She screened children for Medicaid eligibility and referred to DCF for further eligibility determination, managed special projects to ensure proper enrollment of customers, and resolved escalated enrollment issues as assigned by DCF, ACHA and Healthy Kids. She also performed Operational Readiness Testing/ User Acceptance Testing on the ConneXion system and reported bugs and issues to the development team.

Affiliated Computer Systems (ACS) /Florida Healthy Kids CHIP (05/2006 – 06/2008)

As a data entry clerk and transaction processor, Mara determined eligibility for all programs under the Kidcare umbrella (i.e., Medi Kids, Healthy Kids, Childrens Medical Services [CMS]) Title XXI services. She performed eligibility determinations for all children for which an application was received regardless of the Kidcare program component they would eventually be enrolled in, screened children for Medicaid eligibility and referred to DCF for further eligibility determination, and generated letters and made follow up calls requesting important documents used to determine eligibility. She also manually calculated eligibility based on the current Federal Poverty Level, household size, and assets to enroll children in a federally subsidized premium plans, and tracked the progress of program enrollment applications until approved status was achieved.



Michelle Shores

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 17 years |
| Certifications and Education: | Bachelor of Arts in Business Administration/Public Relations/Marketing, University of Georgia Microsoft Certified Systems Engineer Paradox PAL Certified Microsoft Certified Site Builder Level 4 CEU's Certified Information Systems Security Professional |

Overview

Michelle has more than 20 years' experience in the healthcare marketplace with a history of working on Independent Verification and Validation (IV&V) with Risk Assessments, Request for Proposal (RFP)/Advanced Planning Document (APD) Development, Health Insurance Portability and Accountability (HIPAA)/HITECH Audit & Implementations, Innovating Big Data Capabilities Delivery, Industry Partnership Development and Training Outreach. She has led efforts to provide tailored solutions that aid industry leaders and offered guidance in mitigating risk while enabling profitability for covered and non-covered entities in the Ecosystem. Michelle invented the first Electronic Data Interchange (EDI) Gateway and Data Warehouse for HIPAA claims compliance (2001).

Experience

BerryDunn (09/2021 – present)

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

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

- *Eligibility and Enrollment Implementation Assistance (09/2021 – present)*
Michelle is supporting the project activities related to the new WV Integrated Eligibility Solution (IES) to consolidate and integrate DoHS program service systems into a single enterprise. She reviews and provides input into assigned project design, assists with project activities associated with requirements, and leads the review and validation activities for the Deliverables Inventory (design documents, forms, letters, notices, and all roles with entitlements) of all legacy systems. Michelle is leading the Change Request, Incident Management and Requirements Traceability validation processes for Eligibility, Family Assistance and Childcare module implementations.

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

- *State Plan and State Plan Amendment assistance (09/2021 – present)*
Michelle supported the project activities related to the State Plan and State Plan Amendment (SPA) Gap Analysis and Remediation effort to align the SPA with



current Policies & Procedures, Operations, and Systems. She provided subject matter expertise, developed Section 4 gap impacts, develop SPAs for Section 4 and specifically the Public Health Emergency (PHE) for COVID related updates for testing, vaccine, vaccine administration, treatments, and counseling. She monitored and provided briefs pertaining to Federal Guidance from multiple sources including but not limited to The Center for Medicare/Medicaid Services (CMS) SPA initiatives, Streamlined Modularity Certification (SMC), U.S. Government Accountability Office, DHHS GitHub, etc. Lastly, Michelle developed and delivered Build Back Better Brief for Medicaid specific impacts and changes. Plans for her to continue work on the Verified Lawful Presence (VLP) interface are in progress.

Puerto Rico Medicaid Program (2020 – 2021)

Michelle worked as an Eligibility and Enrollment Subject Matter Expert (SME) to provide expertise for the Citizen Portal, Caseworker Portal, Appeals, Audit, Quality Control and Certification requirements. She developed functional and non-functional requirements, facilitated Joint Application Design (JAD) sessions, and reported and monitored design completion, development, and implementation through end-to-end testing. Michelle also provided compliance and SPA expertise, as well as internal IV&V subject matter expertise and recommendations for requirements validation.

Alabama Medicaid Agency (2018 – 2020)

Michelle worked as an IV&V Project Manager responsible for both the Medicaid Management Information System (MMIS) replacement project from the initiation and planning phase and the current Eligibility & Enrollment product in production. She provided oversight with industry best practices as well as CMS requirements and managed the IV&V team of multiple resources on site and virtual. Michelle developed deliverables, maintained and submitted progress reports, and produced internal team reviews. She also produced project work plan including stakeholder engagement, communication plan, Software Engineering Services (SES) process to IV&V and agreed outcomes with project schedule for three consecutive years.

Commonwealth of Kentucky Cabinet for Health and Family Services Division of Medicaid Systems (2017 – 2018)

Michelle worked as the Deputy Program Manager for the Medicaid Enterprise Management System replacement MMIS project under ACA expansion. She implemented a new reporting structure with program templates and new scheduling to meet program deficits. During this phase, she discovered over 250 new tasks for program schedule and governance. She delivered all artifacts and checklists and researched and presented Administrative Services Organizations (ASOs) for Third-Party Liability (TPL) and Pharmacy Benefit Management (PBM) type Fee for Service (FFS) implementations to Executive Management. Michelle also liaised between the Commonwealth, the Center for Medicaid/Medicare Services and internal Commonwealth and public facing teams.

Data Health Partners (2008 – 2017)



Michelle worked as the principal for advisory validation and audit, which entailed performing IV&V with risk assessments, HIPAA/HITECH audit & implementations, innovating big data capabilities delivery, industry partnership development and training outreach. She was tasked to assist CMS with communicating HIPAA/HITECH/MMA/ICD-10, PPACA (Meaningful Use, HIE, Quality Measures) and engaged State/Federal Government and commercial organizations.

United Healthcare/Optum (2015)

Michelle worked as a Business Analyst and healthcare SME to produce a study outlining strategic capabilities and use case documentation of data sources for new implementation of the individual ID for Master Data Management. This ID enabled the plan to better provide consumers with their information as it pertains to demographic and medical care at all stages of life.

BCBS of Louisiana (2014)

Michelle worked as a Project Manager that reported to leadership of all Program Management Office Governance policies and processes for Healthcare Reform Quality Rating System including Enrollment Survey, HEDIS Clinical Measures URAC measures and identification of Marketplace Survey readiness and Benefits Open Enrollment. She collaborated in clinical partnerships implementation of vendor product America Well Telemedicine audio/video clinical visit enterprise platform for physician network outreach development under the direction of the Chief Medical and Assistant Chief Medical Officers.

Florida MMIS (2011 – 2014)

Michelle worked as a Project Manager to create the Florida MMIS IV&V Waiver Analysis Report for the Governor and ASO. Her project management duties included managing and reporting to leadership of all operational readiness, communications, training, and providing seven vendors and IT with 200 business resources.

Health First Health Plan (2009 – 2011)

Michelle worked as the Program Manager performing gap analyses of all systems PACS for the entire Revenue Cycle. She created plans for business operations decisions, risk assessment including HITECH, vendor selection, all vendor reviews and management. She negotiated the adoption of new processes for the business unit and created all Project Management Office (PMO) documentation and governance for policy and program.



Milan Kelly, MBA

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 15 years |
| Certifications and Education: | Master of Business Administration, University of Phoenix Bachelor of Arts in Liberal Studies and Human Services, Southern Connecticut State University |

Overview

Milan is a health care professional with 13 years of Medicaid, SNAP, TANF, Non-MAGI Medicaid program experience as both an Eligibility Services Worker and Social Services Analyst. Milan is familiar with Child Support Enforcement process as it relates to Medicaid, SNAP, and TANF program compliance and has a successful track record with project management office functions including but not limited to planning, generating reports, and implementation. She has experience with system maintenance and troubleshooting, utilizing JIRA and JAMA, and quality assurance for testing production environment defects, change requests, and design updates. She has participated in and tested the implementation of IES releases, upgrades, and modifications in various positions.

Experience

BerryDunn (11/2021- present)

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

- **WV Department of Human Services (DoHS) Bureau for Medical Services**

- *People's Access to Help Project (11/2021 – present)*

Milan has worked as a Technical Business Analyst SME for the West Virginia People's Access to Health Project. She is working on the Data Cleansing and Conversion (Integrated Eligibility Release) area of the project. Milan facilitates meetings twice a week with the WV (West Virginia) DHHR (Department of Health and Human Resources) and Optum to discuss the data cleansing and conversion requirements for the childcare sector and mapping clarifications from FACTS to PATH. She is also facilitating the Mock Conversion Validation activity where WV DHHR is currently validating the case information in FACTS vs. PATH. She also facilitates the review of the technical deliverables such as: D024: Data Retention and Access; D047: Data Cleansing and Conversion for Childcare; D048: Data Cleansing and Conversion Specification; D067: Operational Readiness Plan. D075: Cutover Playbook. She is also coordinating the Interfaces Validation by drafting correspondence to third party vendors to coordinate validation with their respective batch schedules. She has led the Deliverable 047 Post-Review Data Conversion (Child Welfare Release) area of the project which includes FACTS Data Modification, Data Cleansing, and Post Go-Live. She has facilitated the review for the Statement of Work (SOW) with the client to ensure that all parties agreed with the next steps discussed in 2021. Milan has analyzed and identified the data into 2



categories: Investigation Backlog and Data Cleansing Exceptions to facilitate discussions between the client and 3rd party vendors on the most effective method to clean up data prior to conversion. She has tracked burndown for the Investigation Backlog and Data Cleansing Exceptions weekly, providing an ad hoc report to track and monitor the State's data cleansing progress. Currently, Milan is still tracking the Investigation Backlog to monitor progress to assist the client in preparing the data for final conversion from FACTS to PATH. She is responsible for acting as a liaison between the client and 3rd party vendors to review and monitor project progress in the technical area.

Diversified Services Network, Inc. (06/2021 – 11/2021)

Milan worked as an Eligibility Business Analyst to identify and resolve risks and issues impacting the progress and outcome of the project. Milan researched and provided recommendations on critical business decisions, assisted in leading the implementation and associated changes within their business area, and reviewed deliverables according to the schedule. She contributed to the project's overall understanding of business requirements for the IES and collaborated with other business areas to provide subject matter expertise and assistance as applicable. She was responsible for monitoring the project schedule, work plan, and budget for their business area to ensure project meets targeted dates and goals.

State of Connecticut Department of Social Services (03/2014 – 11/2021)

Milan worked as a Social Services Analyst, supporting the Medicaid and SNAP agencies' eligibility services. She specifically worked as a public policy and programs specialist in Medicaid, Medicare, Health Exchange & Medical insurance, ACA, SNAP, Data Cleansing, Testing, Strategy, PMO, Quality Assurance, E-MPI, Toad, Selenium, SQL, WinSCP, PuTTY, Qualatia, Test Automation, and Regression. She developed, wrote, and executed scenarios for reporting and User Testing. Milan additionally provided customer support to users within assigned benefit module(s), resolved routine problems and system issues, and assisted with diagnosis and resolution of common eligibility processing issues. Milan assisted with business process mapping and business requirement gathering. She collaborated with information technology staff concerning technical programming requirements, assisted with implementation of system upgrades and modifications, and loaded data into test environment. Milan developed reports specific to assigned module(s) utilizing ERP system then tested data produced from reports ensuring integrity of data and results. Milan also assisted with identification, development, and execution of training related to ERP system and assigned modules.

State of Connecticut Department of Social Services (05/2008 – 03/2014)

Milan was as an Eligibility Services Worker responsible for determining eligibility for State and Federal funded benefits such as Medicaid, SNAP, and SAGA for low-income residents of the State of Connecticut. She processed and reviewed required verification to obtain and validate demographic information including residency, background data, immigration status and financial information. Milan also evaluated and examined eligibility submissions to identify any missing data and to certify information provided as well as reconcile discrepancies. She conducted interviews, requested additional information as necessary or performed collateral contact, and completed tasks necessary to monitor and manage cases. Milan explained appeal rights,



eligibility rules, and procedures to applicants, attorneys, advocates, providers, public officials, external agencies, the public, and other third parties.



Neal Winn

| | |
|---|--|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 13 years |
| Certifications and Education: | Bachelor of Arts in English, Connecticut College |

Overview

Neal is an IT Business Analyst and Technical Lead focusing on Medicaid and social services with experience in the entire Software Development Lifecycle (SDLC) and a project management emphasis on data quality assurance, business and data analysis, software troubleshooting; and front-end, back-end (DB/Mainframe), and interfaces technical consulting. He has developed a knowledge base in all stages of software testing through his work with state agencies as well as his ability to communicate between diverse parties. He has strong recruitment and interview skills to accompany his ability to lead groups in training, project management, and deliverable review.

Experience

BerryDunn (07/2021 – present)

Neal serves BerryDunn as a business analyst and technical lead, providing support for West Virginia engagements.

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

WV Department of Human Services (DoHS) Bureau for Medical Services

- *People's Access to Help (PATH) DDI Project Management (07/2021 – present)*
Neal works as a Technical Lead/subject matter expert (SME) on the Technical Team of the WV PATH Integrated Eligibility (IE) project providing support and guidance to the overall project management team in the technical aspects of HHS program management areas for Child Welfare (CW), Child Support (CS), and IE. SDLC responsibilities include but are not limited to: Master Data Management (MDM), Data Conversion, Data Clean-up, Interfaces, Batches, Technical Deliverables, Security, and System Architecture. In this role, Neal also researches, reviews, and analyzes a broad spectrum of Policy, IT, and Security related areas of the Medicaid enterprise. As a Technical Lead/SME, Neal facilitates and coordinates the technical aspects required for end-to-end implementation of the IES solution. This includes proactive planning, coordination, validation, and successful implementation of all Interfaces, Batches required for the new PATH system. Neal works closely with the IES functional and technical business partners, IES vendor, trading partners, SMEs, and technical support teams to identify, track, and resolve issues/risks. He also assists with and/or coordinates troubleshooting of system issues/defects related to end-to-end processing of system issues. In addition, he monitors issues and performance, and provides a regular cadence of proactive communication to leadership and team peers in the form of verbal



summaries and written status reports that includes; project status, pertinent issues, major milestones and potential project risks, and issues. Neal provides analysis, review, and management of IES SDLC tenets and best practices in support of technical requirements verification and validation throughout DDI, Testing, and Go-Live. Additional duties include analysis, review, and management of vendor supplied formal Technical Deliverable documentation; regular participation in the formal project deliverable review/comment process, participation in staff/team meetings and trainings, proactive identification of relevant attendees for the subject matter, clearly articulated agenda and topics provided in advance, and well thought out meeting materials provided created and sent to attendees in advance. Additional responsibilities in this area also align with a regular cadence of communication provided prior to, during, and following each meeting to help ensure attendees understand topics beforehand and are provided a concise summary of topics that were discussed/agreed as clear follow-up; frequent, clear, and consistent communication to the client, team members, vendor; successfully working independently with minimal instruction on multiple parallel threads of complex tasks while engaging in administrative tasks efficiently and effectively; performing thorough data integration and system analysis to understand and assess current connections among/between all impacted applications and entity and enterprise systems; and documenting Interface and Batch findings and requirements as part of the integration blueprint including detailed interface schematics to document data flow, transaction volumes, frequency, and other considerations.

State of Connecticut (11/2012 – 07/2021)

Neal worked as an IT Social Services Analyst to process applications for client benefits in Supplemental Nutrition Assistance Program (SNAP), Medicaid, and Cash for both state and federally funded programs. He became one of four AccessHealthCT (AHCT) Cadres focused on implementation of the CT Healthcare Exchange under the ACA with a focus in Medicaid, MAGI Medicaid, and Children's Health Insurance Program (CHIP) as well as the technical, user acceptance, and training aspects of AHCT. As a member of the ImpaCT team, he contributed to the entire SDLC including design, requirements gathering, validation, risk assessment, reporting, User Acceptance Testing (UAT), data conversion, Enterprise Master Person Index (EMPI), and Interfaces/API. He researched, developed wrote, and executed scenarios for testing and analysis of the DSS ImpaCT eligibility management system for all programs including Medicaid, SNAP, CASH, and Long-term care. He worked on the back-end batch processes and real-time interfaces utilizing QUALITIA, SELENIUM, SQL, XML, TOAD, WinSCP, remote DB's, and multiple front-end testing, and batch database environments. Neal performed data clean-up and conversion, provided support to users, identified, and resolved routine problems and system issue, and diagnosed and resolved processing issues. He participated in and tested the implementation of system upgrades and modifications. Neal also assisted with business process mapping and business requirement gathering and collaborated on technical programming requirements. He developed functional procedures and documentation. He developed a knowledge base in benefit modules and how they are integrated, mapping business processes, programming logic, validation testing, script writing, and other troubleshooting software. He interpreted and applied relevant agency policies and procedures as well as state/federal laws, statutes, and regulations.



Poise Inc. (07/2012 – 01/2013)

Neal worked as recruiter and engagement manager to Contingent IT Workforce Recruiting and Staffing. Poise Incorporated is an international firm providing contract staff augmentation along with contingent and retained recruitment services.

CTWORKS - CareerTEAM LLC / KRA Corporation (01/2012 – 07/2012)

Neal worked as an Ex-Offender Retention Specialist closely with Employment & Retention Specialists at to provide service to the ex-offender population in order that it will result in assistance with job search and retention of these clients. He referred participants to the Online Learning classroom and performed resume preparation and vocational assessments. Neal worked with community representatives on a regular basis, developed relationships with vendors and community agencies, and worked closely with temp agencies to find out which jobs accept people with convictions. He represented CTWorks in community meetings.

North American Family Institute (12/2010 – 01/2012)

Neal worked as a Supervisor/Adolescent Development Specialist.

Vertical City Realty (2007 – 2010)

Neal worked as a Residential & Commercial Leasing & Sales Agent

The Gersh Agency (2003 – 2007)

Neal worked as a coordinator/assistant.

The Hartford (2002 – 2003)

Neal worked as a business analyst.



Nora Gilligan, MPA

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Consultant |
| Years of Experience Relevant to Proposed Role: | 13+ years |
| Certifications and Education: | Master of Public Administration, Baruch College, School of Public Affairs Bachelor of Science in International Health, Georgetown University |

Overview

Nora Gilligan is a Senior Consultant in BerryDunn's Medicaid Practice Group. Her experience brings a unique blend of project management and subject matter expertise, with over thirteen years of direct policy analysis with health and human services programming across federal, state, and local levels. As Deputy Project Manager in her current work on the People's Access to Help (PATH) integrated eligibility solution implementation, Nora balances her team and client management skills with her working knowledge of certification and compliance requirements across federal partners, including Centers for Medicaid and Medicare Services (CMS).

Experience

BerryDunn (07/2020 – present)

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

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

- *People's Access to Help (PATH) DDI Project Management (06/2019 – present)*
Nora currently supports work on the West Virginia (WV) PATH project, a large-scale system implementation impacting four State agencies, as the Deputy Project Manager and the Internal State Project Management Office (PMO) Manager. She directly oversees a team of 11, including leads for project-wide activities including change management, project deliverables, program coordination support, and certification and compliance support. She also supports overall project management activities including oversight, monthly status reporting, and governance planning as the project transitions into its maintenance and operations (M&O) phase.
 - Prior to this, Nora played an integral role on the WV PATH Certification and Compliance team, preparing the state for eligibility system review by multiple federal agencies (including CMS, Administration for Children and Families, and Food and Nutrition Services). Nora leveraged subject matter expertise in several program areas to lead research, analysis, and tracking of federal certification requirements for WV PATH and provided support to the project by maintaining relationships with State business partners to manage WV DoHS review of



programmatic criteria sets, to provide evidence of system compliance and ensure full Federal Financial Participation (FFP) from federal partners. Additionally, she provided guidance to the State's IT contractor throughout the systems development lifecycle, to align system configuration and test evidence with state and federal policy and legislation, employed research and analysis skills to respond to project-wide policy questions, and trained a team of three in Certification and Compliance's criteria mapping exercise, expanding the team's capacity to meet deliverable deadlines.

- **Puerto Rico Medicaid Program (PRMP)**
 - *Data Governance Subproject (12/2023 - present)*

TEKsystems (09/2018 – 07/2020)

Nora leveraged her policy knowledge and expertise to support WV PATH certification and compliance activities, managing the development of review materials for federal partners to secure FFP.

ICF (11/2015 – 07/2017)

Nora consulted directly with federal, state, and nonprofit clients on strategy and policy analysis, program management, and project evaluation, specifically in areas of family self-sufficiency, workforce development, and access to healthcare through CMS. She leveraged her knowledge of CMS program eligibility criteria to inform research, analysis, and writing for national and local resource scans for nonprofit client Year Up. Other projects include collaborating with Colorado Department of Health Care Policy and Financing to ensure timely provision of Medicaid services to TANF clients, in developing baseline metrics for state's employment-focused, family-centered TANF program; researching, selecting, and coordinating with CMS program subject matter experts from CO, FL, NY, and VT to communicate critical information and updates to clients, colleagues, and other stakeholders relative to TANF, Medicaid, ACA, and mental health services integration; and providing implementation science technical assistance to WV human services agency to guide development of data-driven outcomes measures, resulting in adoption by state workforce development council and \$250,000 contract for continued work.

US Department of Health & Human Services (02/2011 – 11/2015)

As Special Assistant to the Director, Nora provided direct management, policy guidance and chief administrative support to appointed directors in the Office of Family Assistance. Tasks included:

- Represented TANF on HHS/ACF Chief Medical Officer's work group, providing information and guidance to ACF Assistant Secretary around Medicaid and ACA outreach and education efforts and assumed eligibility policy with state CMS programs.
- Performed extensive literature review of HHS Office of the Assistance Secretary for Planning and Evaluation interviews with state TANF and Medicaid programs to inform guidance to states on collection of housing status and homelessness data from TANF and Medicaid program applicants.



- Developed knowledgebase around Medicaid eligibility criteria and other supportive services and programs, to collaborate with 19-member Interagency Workgroup on Family Homelessness in development of guidance and technical assistance strategies to educate national, state, and local stakeholders on coordinated entry and integrated CMS eligibility efforts.
- Wrote and published guidance on TANF and family homelessness, managing an internal team of 12 and coordination with other federal and external offices throughout review and approval process, to offer states interpretation of flexibilities offered within TANF legislation to address housing and related needs.
- Created social media engagement plan and established Twitter presence across office programs, building direct access to and dialogue with state and local constituents, policy and advocacy groups, researchers, and other stakeholders.
- Established formal Director of Communications role after taking ownership over internal and external communications and relationship-building, including drafting and editing Director's talking points and blog posts, leading site visits across US states and territories, and representing Director at meetings with grantee organizations, foundations, and state agencies.
- Developed management tool and system to track deliverables across 5 program offices and 10 regional offices, streamlining director's updates to department leadership and leading to implementation of up-to-date schedule for publishing program data.

Papercut Magazine (10/2009 – 05/2013)

Nora was a founding member of this monthly online publication with mission to be platform for emerging musicians, photographers, visual artists, and designers. She led qualitative needs assessment and market research to direct company's branding and target audience, contributing to vision for website, content development and marketing strategy.

City of Oakland (08/2008 – 06/2009)

As a policy analyst, Nora worked directly with Workforce Investment Board (WIB) Director in Mayor Ronald Dellums' office, toward Master of Public Administration (MPA) practical work experience. She conducted an evaluation of local workforce development programs and researched policy issues relevant to Workforce Investment Act legislation and American Recovery and Reinvestment Act funds, informing Director's reports to City Council and increasing business sector membership on the local WIB.

U.S. Department of Health & Human Services, Office of Global Affairs (10/2006 – 05/2008)

Nora assisted the Deputy Director for Policy in her provision of policy guidance and strategy around global and refugee health issues inter-governmentally and internationally. She researched, analyzed, and edited health policy documents relevant to priority initiatives, resulting in draft briefing materials for United Nations General Assembly and World Health Organization Executive Board meetings. She also participated in multilateral special projects as



project manager for Security & Prosperity Partnership of North America and point-of-contact for 2007 Global Health Security Initiative Ministerial, developing diplomatic skills.



Payton Waybright

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 4 years |
| Certifications and Education: | Regents Bachelor of Arts (RBA), Marshall University, coursework in nursing, psychology, and dietetics |

Overview

Payton brings 10 years of clinical experience and medical knowledge. She is experienced in office settings and organization, as well as teamwork. Payton is hardworking and great with communication within the project and the team.

Experience

BerryDunn (08/2020 – present)

WV Department of Human Services (DOHS) (08/2020 – present)

Payton is the Project Resource and Reporting Lead for the PATH Project. She manages the day-to-day coordination of a 40+ member team. She has a variety of responsibilities, which include oversight for project team organization and resources, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs), and helping to ensure vendor accountability and adherence to SLAs. Payton drafts Monthly Status Reports and the Commissioner Briefing Report for the PATH project, oversees the project team's reporting activities, and provides quality assurance to help ensure assignments are complete and on time for client submission. She manages a team of project coordinators and provides onboard documents and training to new hires. Prior to the lead resource coordinator position, Payton worked as a project coordinator for the PATH project for 10 months. She stayed organized to ensure the meeting materials were delivered in a timely manner to meet the SLAs.

Mildred Mitchell Bateman Hospital (05/2016 – 08/2020)

Payton aided mentally/emotionally impaired clients, assisting in daily living activities. She filed paperwork for the unit for inpatients, outpatients, and new hires, served as team lead for new employees and sanitation, and was responsible for medical terminology and management.

Holzer Senior Care (06/2015 – 05/2016)

Payton was responsible for unit charting on patients. She performed CNA duties and served as a Team Patient Activity leader.

Huntington Health and Rehabilitation Center (05/2014 – 02/2015)



Payton performed CNA duties, aiding patients with daily needs. She was responsible for unit charts on patients and patient activities.

Pleasant Valley Nursing Home (05/2011 – 03/2014)

Payton served CNA duties and assisted with charting patients.


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

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

Overview

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

Experience
BerryDunn (03/2014 – present)

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

- **State of WV**

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

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



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

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



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

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

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

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

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

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

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

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

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

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

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

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

Health Dialog (07/2006 – 11/2008)

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



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



Rakesh Kuttappillil, MS

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 13 years |
| Certifications and Education: | Master of Science, University of Illinois at Chicago Bachelor of Science in Engineering, Ramaiah Institute of Technology |

Overview

Rakesh is an experienced consultant with 13 years of experience in health and human services, state government, and healthcare. This experience includes detailed projects with the Affordable Care Act (ACA), integrated eligibility systems, Medicaid Management Information System (MMIS), claims processing, HIPAA, electronic data interchange, and ICD-10. He brings an excellent understanding of large-scale full lifecycle implementation, SDLC methodologies, business process reengineering, business requirements elicitation, and testing processes.

Experience

BerryDunn (10/2018 – present)

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

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

- *People's Access to Help (PATH) DDI Project Management (10/2018 – present)*

As WV PATH Testing Manager, Rakesh manages testing efforts by developing and implementing practices and procedures for User Acceptance Testing (UAT), providing leadership and support to WV PATH testing activities, and reviewing vendor deliverables (such as system integration testing [SIT] test cases/results and test plans). He also creates project deliverables and provides dashboard level reporting on testing progress.

Illinois Department of Healthcare and Family Services (HFS) (02/2011 – 09/2018)

- **Integrated Eligibility System (IES) PMO (09/2012 – 09/2018)**

As a business analyst through the Gantec Corporation, Rakesh provided overall guidance and direction to meet ACA requirements. This included helping to ensure that system requirements were met as defined by IES business users, coordinating the resolution of implementation issues between the vendor and the State, facilitating design sessions between the vendor and the State, leading deliverable reviews, and tracking key metrics. Rakesh also planned and validated UAT plans, scenarios, and test cases for the project. He worked with the State to improve business processes, as well as to review and evaluate the vendor's implementation milestones for the project.



- **HIPAA 5010 Upgrade Project (02/2011 – 09/2012)**

Rakesh served as a business analyst through Reliance IT, Inc., working from the project initiative phase through the post-implementation phase. As part of this role, he conducted and documented gap and impact analyses to meet the new standard, documented business requirements and functional specifications, analyzed existing workflows to identify improvements, assisted in the development of project initiation requests to document new features that were required to meet the standards, worked on various X12 transaction sets, and assisted in all aspects of testing.

Ecalix, Inc. (08/2010 – 01/2011)

Rakesh served as a business analyst with Ecalix's Walmart contract, working with business owners to document requirements for various technical solutions. This included gathering business requirements by interacting with the merchandising technology subject matter experts (SMEs) and project managers to get a better understanding of the business processes, creating As-Is and To-Be process models, participating in JAD sessions and working with the development team to determine the technical solution, and conducting requirements review meetings to identify missing or incomplete requirements. Throughout this work, he helped to ensure that requirements were complete, traceable, feasible, unambiguous, and verifiable.

Trustek, Inc. (04/2008 – 07/2009)

Rakesh was involved in the customization and configuration of SAP Procure-to-Pay process. As a business analyst, he conducted workshops and discussions with users and business process owners in understanding current business processes and documenting those business processes. He also conducted a gap analysis to determine any extended functionality that needed to be defined before realization phase, and prepared business process blueprints for procurement, inventory management, and invoice verification.

Broadwind Energy, Inc. (10/2007 – 03/2008)

Rakesh served as engineer for Broadwind. He analyzed costs, processes, planning and functional controls to help ensure continuous improvement to cost, quality, and delivery. He also developed, implemented, and improved processes for manufacturing gear related products, and developed and reviewed the precision and accuracy of manufacturing documentation and procedures.

University of Illinois at Chicago (04/2006 – 08/2007)

As an IT graduate assistant, Rakesh managed the department database and participated in student appointment processes. He also provided network administration, technical and end-user support, and report production using MS Access.

ETA Technology Pvt. Ltd. (09/2004 – 02/2005)



Rakesh developed and reviewed conceptual designs to assure these met plant, corporate, and project specifications. He also created manufacturing documentation such as BOMs, change orders, and manufacturing test specifications.



Reanna Jones

| | |
|--|--|
| 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 Healthcare Management, Florida A&M University |

Overview

Reanna is an experienced leader with more than eight years' consulting experience in Medicaid, Medicare, and third-party liability health care billing. She is skilled in project management, data analysis, agile and waterfall software development life cycle (SDLC) processes, Requirement Traceability Matrices (RTM), business requirement documents (BRD), electronic data interchange (EDI), and customer service.

Experience

BerryDunn (01/2022 – present)

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

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

- *People's Access to Help (PATH) Project (01/2022 – present)*

Reanna is supporting project activities related to the PATH Child Welfare project collaborating with the state fiscal agent to resolve any concerns or issues identified with design validation phase of the project. She assists with reviewing design documentation produced by the state fiscal agents to evaluate for accuracy of requirements gathered, testing data and scenarios. She escalates items identified during the design validation phase to the state fiscal agent to resolve any questions or concerns related to documentation before escalating to the client. She researches system issues identified with the PATH (Go-Live) system to assist with determining if the issues are functional or business policy related. Occasionally, she assisted the integrated eligibility support team with the deliverable review process.

- *Eligibility and Enrollment Implementation Assistance (01/2022 – 12/2022)*

Reanna supported the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DHHR program service systems into a single enterprise. She reviewed and provided input into assigned project deliverables, assisted with project activities associated with requirements, and lead the review and validation activities for the document inventory (forms, letters, notice) of all legacy systems.



Gainwell Technologies (01/2015 – 01/2022)

Reanna worked as a Senior Business Analyst to provide creative solutions to user requirements, solve client problems, and work with the Florida Agency for Health Care Administration (AHCA) by participating in business requirements sessions and timelines. She assisted Medicaid policies with special tasks and provided follow-up reporting for the Center for Medicare & Medicaid Services (CMS) that included the percentage of dual eligible recipients, the number of Medicare claims received and processed during a certain period, the number of claims that paid and denied, and the ratio of claims received and paid. She served as the department's lead analyst when working with different Medicaid vendors on various projects and advised Medicaid providers on locating information for further assistance depending on inquiry. Reanna also reviewed business related documents such as business analyst test case outcomes, collected research, and developed provider outreach and training material for quality and accuracy. She communicated with third-party vendors to collaborate on changes within interchange, worked with vendors such as Electronic Verification Vendor (EVV), CMS, Health Care Management Systems (HMS), Minnesota Mining and Manufacturing Company (3M), Navigant Consulting Firm, Magellan, and Molina Health, and assisted the system architects with designing the layout and functionality of user interfaces both internal and external for new changes to the system. Reanna created RTMs, Business Requirements Documents (BRDs), test strategies and test plans to be used by junior business analysts to complete work assignments, as well as assisted with installing new systems by performing functional, regression, stress, and post implementation testing. She facilitated client meetings to discuss project status, changes, and impact. She assisted the project manager with constructing project plans, metrics, and timelines for junior level business analyst projects and work assignments. She provided group and one-on-one Medicaid policy training sessions to new hires and peers within the department and collaborated with data scientist by providing Medicaid claim variables to be used for monthly operational data analysis reports created through Tableau.

Hewlett-Packard (07/2013 – 12/2014)

Reanna worked as a Healthcare Insurance representative and Business Analyst Trainee to assist Florida Medicaid providers with claim processing and payments inquiries, advise providers on seeking information for further assistance, and report system issues to management immediately and effectively so that they could be escalated and resolved in a timely matter. She provided customer service and assisted in recording and reporting escalated call center issues to supervisor to aid in providing provider outreach alerts and bulletins for identified system issues. Reanna was the healthcare policy and regulation subject matter expert for the department and so provided the relevant training to peers. She assisted supervisor with special projects within the department when call centers such as the EDI and provider enrollment departments needed additional agents.



Roshani Raghani

| | |
|---|--|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 12 years |
| Certifications and Education: | Bachelor of Science in Microbiology, Mumbai University Scrum Fundamentals Certified Certified Medical Transcriptionist, American Association of Medical Transcriptionists Lean Six Sigma Champion Certification |

Overview

Roshani is an insightful and experienced business analyst with over 10 years of experience working in business process flow management, Software Development Life Cycle (SDLC) processes, and requirements gathering, analysis, and management. Roshani demonstrates a proven commitment to using her strong analytical foundation to help support successful outcomes for state agencies, and she has extensive knowledge related to a variety of critical programs, including Medicaid, Supplemental Nutrition Assistance Program (SNAP), and Child Welfare and support programs such as Women, Infants, and Children (WIC). She has experience in business reengineering, business and functional analysis, systems analysis and design, quality assurance, gap analysis, and policy and regulatory review, along with a deep familiarity with system frameworks and initiatives, such as Medicaid Information Technology Architecture (MITA). As a seasoned project leader, Roshani exhibits heightened skill in cross-team communication, helping to facilitate efficient project processes and outcomes in areas such as user acceptance testing (UAT) and federal certification efforts.

Experience

BerryDunn (02/2022 – present)

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

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

- *WV People's Access to Health (PATH) Project (02/2022 – present)*

Roshani works on the WV PATH project as a Certification and Compliance Team member, managing the development of review materials for federal partners, including Centers for Medicare & Medicaid Services (CMS), United States Department of Agriculture (USDA) Food and Nutrition Services (FNS), Child Support, Child Welfare, and Social Security Administration (SSA) to secure Federal Financial Participation (FFP). She works on highly productive project teams delivering services to state government agencies in areas such as Integrated Eligibility, Medicaid, Unemployment Insurance, Child Support, and Child Welfare.

NTT Data (08/2021 – 02/2022)



As a Senior Agile Business Analyst working with Guardian Life Insurance, Roshani worked on Agile Projects creating Epics and features. She collaborated closely with the assigned project managers, Scrum masters, and client to define the scope of a project. She performed testing and validation for the projects, used knowledge of Jira® and Jira® Align for backlog management, and identified risks, issues, assumptions, and dependencies to support solution delivery. Roshani performed duties of Lead Business Analyst/Product Owner for high visibility and high priority projects and used best practice business and technical analysis principles such as process analysis and definition in using structured approaches.

KPMG (07/2019 – 07/2021)

Roshani worked as a Senior Business Analyst for the Pennsylvania (PA) DoHS MMIS 2020 project to create high-level process flows to use as a starting point for upcoming requirements validation workshops. She facilitated discussions to gain consensus on requirements before the module contractors joined the project, included workshop outcomes in module Request for Proposals (RFPs), and confirmed that each PA Medicaid process flow aligned with the CMS Medicaid Enterprise Certification Toolkit (MECT) critical success factors. She authored artifacts including requirements specification documents, application tutorials, process flow diagrams, and meeting agendas/minutes. Roshani forecasted project budgeting and depicted return on investment (ROI) using advanced MS Excel and Visual Basic modeling.

Momentum Consulting (09/2016 – 07/2019)

Roshani served as a Senior Business Analyst with PA Department of Technology (DOT) projects to facilitate and participate in requirements elaboration sessions between customers, business representatives, subject matter experts (SMEs), and development teams. She authored artifacts and conducted observation sessions with designated business unit staff to document the current business processes, user roles, systems, data information (entities and attributes), and rules. She documented the current enhancement requests related to the current Enterprise Content Management systems and also managed development teams as the Scrum master, using Agile methodology for successful execution of the SDLC. Roshani also created test management plans, test scripts, and test cases, and performed System Testing and UAT. Roshani facilitated training for businesses to perform UAT. She forecasted project budgeting and depicted ROI using advanced MS Excel and Visual Basic modeling.

Computer Aid, Inc. (05/2016 – 09/2016)

Roshani worked as a Business Analyst with a concrete understanding of business requirements gathering, business process flow, business process modeling and analysis, and design documentation. She facilitated and analyzed Joint Application Development (JAD) sessions among the user community, stakeholders, and technical management. Roshani created project plans and schedules, conducted gap analysis, Strengths, Weaknesses, Opportunities, and Threats analysis, cost benefit analysis, ROI analysis, and performed data analysis, impact analysis, risk analysis, and created test cases for UAT. She interacted with the development team to provide environments that were ready for test users and end-users, as well as facilitated test plan/test case walk-throughs to obtain feedback and approval signoffs. Additionally, she worked on Unified Modeling Language, Object Oriented Analysis and Design, Rational Unified Process, Agile Project Management, and Scrum.

Holy Spirit Hospital (Geisinger) (10/2012 – 04/2015)



As a Business Analyst, Roshani provided functional SME to all client requirements for designs and implemented and reviewed new processes and technologies to systems. She was responsible for researching Medicaid guidelines to make sure Holy Spirit was meeting Medicaid's standards, coordinating with communication team members and clients to design all required learning materials, and preparing presentations and databases to provide workforce support. She interacted with clients to develop consulting and project management skills, address data requests, and assist in data management. She converted business requirements into test scenarios through in-depth analysis, enhanced manual, and automation testing skills, and refined her expertise in creating and maintaining requirements documentation.

Health Prime International (08/2010 – 04/2011)

Roshani worked as an Electronic Health Record (EHR) Analyst to transcribe and record operative reports, discharge summaries, patient history and examinations, physician letters and notes, and pharmacy, rehabilitation, autopsy, and x-ray reports. She oversaw daily department activities to optimize productivity and quality of work and responded to inquiries for the release of medical information, helping to ensure that legal requirements were followed, and proper consent was obtained, as well as helped to ensure strict confidentiality of financial records. She created business requirements and functional requirement specifications documents and served as a liaison between clients and technical staff to resolve conflicts and worked to bridge the gaps between IT and business clients.



Samuel Kessler

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 4 years |
| Certifications and Education: | Bachelor of Science in Marketing, West Virginia Wesleyan College |

Overview

Samuel is an experienced customer service professional, bringing seven years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

Experience

BerryDunn (08/2020 – present)

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *People's Access to Help (PATH) (08/2020 – present)*
 - As Deliverables Lead Samuel manages contract deliverables from the training, testing, functional, technical, certification, and operations areas. As such he manages the production of the Design, Development, and Implementation (DDI) and Maintenance and Operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to ensure that the documents reflect functionality within the system and works with the vendor and the client to address any gaps.
 - *Children with Serious Emotional Disorder (CSED) project (08/2020 to 12/2022)*
 - Samuel was a project coordinator for both of the above projects. He had a variety of responsibilities, which included organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracked decisions, interfaced with vendors, assisted with the drafting of reports, and supported the project team in a variety of functions.

N3 LLC (05/2018 – 08/2020)



Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. Currently he drives Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

Target (06/2017 – 01/2018)

As an electronics sales floor associate, Samuel helped guests with education on devices and products, answering questions, and making sure that each guest's needs were taken care of.

Trojan Landing LLC (05/2013 – 08/2016)

As a marine salesperson for Trojan Landing LLC, Samuel assisted customers with their personal recreational vehicle needs, making sure to match each customer with the right product for them. He took them through purchase, title, and financing, and assisted with maintenance and storage needs afterwards. As marketing director, he handled all online sales, digital and print marketing, and event planning and marketing.



Shaun Meeks, MS

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 27 years |
| Certifications and Education: | Master of Science in Economics, Econometrics, and Experimental Statistics, New Mexico State University Bachelor of Business Administration in Marketing and Economics, New Mexico State University |

Overview

Shaun has 27 years of experience supporting the initiation, procurement, design, development, implementation, testing, operations, and management of technical business solutions to solve real-world problems in multi-disciplinary settings. He has significant experience in supporting the procurement, design, development, implementation, certification, testing, and management of Medicaid enterprise systems and program/policy changes by providing core planning, statistical modelling, demography, and risk-based financial analytics services. Prior to health care, Shaun spent time assisting in the development of prototype agri-business research, technology, and economic sector development by supporting project management, application development, operations management, and planning through statistically based policy feasibility analysis, risk analysis, and market analysis services for multiple unique multi-disciplinary, and multi-organization projects.

Experience

BerryDunn (04/2019 – present)

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *People's Access to Help (PATH) DDI Project Management (04/2019 – present)*
Shaun provides financial subject matter expertise for the project including cost allocation plan development and overall financial subject matter expert (SME) services for system design and testing. Additionally, he offers business analysis services including design validation and testing, requirements traceability and fulfillment analytics and reporting, certification preparation and analysis, design document review and analysis.
- **Alaska Department of Health and Human Services (DHHS) Office of Children's Services**
 - *IT Systems Planning and Procurement (06/2023 – present)*
Shaun provides cost/benefit analysis expertise and analytics for the cost/benefit analysis and feasibility study deliverables in this project. This includes using historical program-related and IT-related financials to forecast the existing child welfare system into the future. It also includes using econometric methods to



estimate the cost to procure various types of new systems such as accelerator systems, transfers, enterprise systems, or maintaining the status quo.

- **Mississippi Department of Human Services**

- *Legacy Systems Assessment (11/2022 – 03/2023)*

Shaun provided cost/benefit analysis expertise and analytics for this project's cost/benefit analysis and feasibility study deliverables. This includes using historical Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Childcare and Child Support financial data from both the program and IT budgets to forecast operations costs into the future. It also included using econometric methods to estimate the costs to procure and cost allocate various system implementation scenarios from commercial off the shelf (COTS), transfer systems, enterprise systems, or maintaining the status quo.

- **Arizona Department of Economic Security Division of Benefits and Medical Eligibility**

- *AZTECS, AzCCATS, & LIHEAP Modernization Planning Project—Consulting/Advisory Services (11/2021 – 06/2023)*

Shaun provided cost/benefit analysis expertise and analytics for this project's cost/benefit analysis and feasibility study deliverables. This includes using historical SNAP, TANF, Childcare, and Child Support financial data from the program and IT budgets to forecast operations costs into the future. It also included using econometric methods to estimate the costs to procure and cost allocate various system implementation scenarios from COTS, transfer systems, enterprise systems, enhancing current systems, or maintaining the status quo.

- **Massachusetts (MA) Health Insurance Exchange**

- *Integrated Eligibility System (MA Health Insurance eXchange/Integrated Eligibility System) (12/2012 – 02/2013)*

Shaun established, tested, and implemented Medicaid/Children's Health Insurance Program (CHIP) cost allocation procedures. He also audited cost allocation journal entries and provided adjustments to match policy and procedures and comply with CMS 32/64 reporting standards and the CMS-21 for CHIP.

The Auspex (08/2009 – present)

Shaun is owner and principal consultant for The Auspex, an independent consultancy that provides IT modernization planning, feasibility studies, and cost/ budgeting analytics for government health and human services initiatives.

In his other work, Shaun is responsible for:

- Updating WV's methodology for outpatient mental health rate setting that includes utilization and budget simulation with optimization towards targeted budget.
- Conducting targeted micro-impact analyses, demography, and quantitative analytics to support WV with policy changes including the ACA.
- Assisting New Mexico's Medical Assistance Division with planning for their MMIS re-procurement project.



- Assisting Nebraska with advanced planning budgets, cost/benefit, and feasibility analytics, claims operations and staffing modeling, and mentorship for new Medicaid finance staff.
- Applying econometric business and financial analytics for Florida's MMIS modernization project.
- Providing business and financial analytics and strategy for Minnesota's MITA and MMIS modernization project.
- Providing business and financial analysis for Missouri's MITA and MMIS procurement alternatives analysis and strategy project.
- Estimating the cost to design, develop, implement, administer, maintain, and operate a State-run exchange in Iowa, including a sustainability analysis.
- Providing cost/benefit analysis for New Mexico's eligibility procurement planning project.
- Providing statistical quality assurance reviews of the analytical components of Medicaid primary care programs and maternity care programs for the State of Alabama.

The Policy Collective, LLC (07/2012 – 10/2017)

Shaun defined the financial, accounting, and comptroller processes, implementing the infrastructure and systems needed to track the financial position of the company. This included strategic planning, contract scope of work negotiations and evaluations, and product development initiatives.

FourThought Group (08/2002 – 08/2009)

Shaun introduced robust and sophisticated quantitative analytics to the company's consulting toolset, which led to promotion to the company Economist. General duties included maintaining an up-to-date understanding of Medicaid expenditures, collecting, and analyzing data for projects company-wide, from state-level Medicaid Budget and Expenditures System reports (CMS-64) and Medicaid statistical reports. He provided consulting services for Medicaid agencies in Alabama, Massachusetts, South Dakota, Texas, Vermont, and Washington.

New Mexico Health Policy Commission (01/2001 – 08/2002)

As senior economist, Shaun researched, developed, and applied statistical and analytical techniques to existing databases; maintained information on national and state issues concerning health care finance and health economics; served as statistical, financial, and economics consultant to agency staff and related taskforces and workgroups; extended HEDIS methodology to allow statistical comparisons across New Mexico health plans; and developed micro-simulation methods that incorporated statutorily collected health data and other public data sources to accurately model and analyze the New Mexico Health care delivery system.

Other Related Experience

Shaun served as Chief Financial Officer for Sierra Vista Hospital (New Mexico). In addition, he served as programmer analyst, basic programming teaching assistant, and research assistant



for New Mexico State University, all of which contributed to his expertise in economics and statistics.


Sudha Ganapathy, PMP®, Prosci® ITIL (F), CCP, LSSGB

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Consultant |
| Years of Experience Relevant to Proposed Role: | 25 years |
| Certifications and Education: | <p>Bachelor of Arts in Computer Science, Rutgers University SDNBV College, TamilNadu, India – Major: Chemistry, Minor: Mathematics and Physics</p> <p>Certified Project Management Professional®, Project Management Institute®</p> <p>Information Technology Infrastructure Library (ITIL) Foundation Certification</p> <p>Certified Lean Six Sigma Green Belt (LSSGB)</p> <p>Prosci® Certified Change Practitioner</p> <p>MLC Certified Medicaid Professional (HIT+ MCMP -II)</p> |

Overview

Sudha is a project manager with more than 25 years of extensive experience in the Information Technology (IT) areas of development, system analysis, and quality assurance. With over 20 years of experience in Medicaid-related engagements, she has led project teams to help clients achieve their quality assurance objectives on multi-stakeholder and multi-agency projects. She brings a proven record of accomplishment in successfully implementing and maintaining software programs, utilizing PL/I, COBOL, DB2, IMS, various IBM® utility programs, Easytrieve, and SQL, and creating test cases for unit and integration testing and production support. Sudha prides herself on her ability to collaboratively work with clients and vendors (internal and external) to help them better utilize analytical tools and techniques to support project objectives, enhance and/or create new processes to help with testing, and realize opportunities for improvement in their existing processes.

Experience
BerryDunn (07/2015 – present)

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *Medicaid Performance Management & Quality Assurance (MPMQA) Phase III (05/2022 – present)*
As the Project Manager on the MPMQA project, Sudha is responsible for coordinating the quality assurance activities related to Medicaid. She worked with the last project manager to finalize the Statement of Work (SOW) and governance documents and worked on the Advance Planning Document (APD) for 2023. Sudha submitted the SOW for MPMQA Phase III, which was approved for May



2023 – June 2024. She collaborates with the functional, testing, and certification teams on the PATH project to gather the information necessary to present in the MPMQA status report. She also collaborates with other teams such as Enterprise Data Solution (EDS) as necessary to gather information for the MPMQA status report that is sent to the Bureau for Medical Services (BMS) Deputy Commissioner monthly.

- *People's Access to Help (PATH) Integrated Eligibility Solution (IES) Project Management (10/2019 – present)*

Sudha supports the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DoHS program service systems into a single enterprise. As a Project Management Organization (PMO) and System Integration Test (SIT) lead, Sudha creates, reviews, and provides input on project testing deliverables, coordinates project activities, and assigns and oversees team assignments for 8-10 consultants. In addition, Sudha helps this project achieve its objectives by collaborating with the vendor, Optum, and DoHS to assist with User Acceptance Testing (UAT) scenario development and testing related activities.

Sudha is the lead for the Child Support (CS) release and supports the multiple user interface maintenance release(s). As a lead, she collaborates with Optum on the requirements coverage, release schedule, and deliverable activities related to testing. Sudha assigns and oversees team activities such as test scenario/test case/test results reviews, communicates with Optum on the findings, and approves the responses from Optum.

- *Recipient Automated Payment and Information Data System (RAPIDS) (Eligibility System) Transition Facilitation Project (02/2016 – 05/2016)*

Sudha assisted with the RAPIDS transition facilitation project and identified and documented risks/issues prior to the transition of RAPIDS from Deloitte to Optum. She also assisted with tracking Project Change Requests (PCRs) and creating reports to capture the aging of the defects and reviewed and provided feedback on process documents such as the Incident Management Report and Problem Management Report.

WV Bureau for Medical Services (BMS)

- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (07/2015 – 08/2016)*

Sudha assisted with UAT for BMS' MMIS re-procurement in the Medicaid Information Technology Act (MITA) business area of Provider Management. She reviewed and helped modify the Doc Matrix, the primary document that drove the Provider Enrollment web portal options based on provider types.

- **Massachusetts HIX/IES Entities**

- *IV&V Services (07/2016 – 09/2019)*

Sudha served as the BerryDunn IV&V testing lead for nine end-to-end project release cycles. In this role, Sudha interfaced with the State and Optum counterparts to provide deliverable quality oversight and process improvement guidance and enforced program and project best practices in Project Communication, Integration, Quality Management and Risk Management per the Project Management Body of Knowledge (PMBOK®). For ongoing releases, she



assessed the test coverage and execution against plan and the PMBOK® best practice, as well as monitored defect management practices against plan and the best practice accepted by similar industries and monitored planned versus delivered requirements by release. In case of discrepancies, she helped ensure the findings were reported via the monthly IV&V assessment report and logged as issues and risks in JIRA® if the discrepancies warranted further and immediate remediation efforts. For an alternate project for the same client, Sudha also played a key role in developing a new JIRA® Implementation and Requirements Management Plan. She worked with the MassIT analysts to analyze existing ALM/JIRA® data elements and define them in the new JIRA® instance.

XEROX – Government Health Solutions/Cognizant Technology Solutions (2012 – 2015)

As a functional lead for Montana MMIS, Sudha collaborated with the Montana Department of Human Services (DHS) business analysts to define and enhance the online Provider Enrollment portal. As a team lead for the Architecture and Letter related functional areas, Sudha defined Quality Assurance (QA) Strategy, estimates, and roadmaps with on-site and offshore working models. Additionally, she created and executed test cases, analyzed, and reviewed written test cases, and created and conducted various knowledge transfer sessions as needed. She conducted triage meetings as necessary with the functional team, development team, and QA team to identify and rectify defects and complete testing activities as per schedule.

Affiliated Computer Services, Inc. (ACS) (2007 – 2012)

Sudha worked as a systems consultant senior analyst and provider team subsystem lead for the Alaska MMIS. The position involved analyzing business use cases, user interface specifications, and user requirement specification documents to create effective test scenarios and test cases. Additionally, she conducted online training to team members and provided statistics and reports to management as required; and created and executed quality test plans, test cases, and test scripts to comprehensively validate the functionality components of the Provider/Security Subsystems using Rational tools.

UNISYS (2000 – 2006)

Sudha supported the Louisiana MMIS, converting several Easytrieve programs to COBOL and successfully promoting them to production. She was a member of the Medicaid Eligibility Determination System (MEDS) enhancement team, responsible for the modification and testing of several Management and Administrative Reporting Subsystem (MARS) programs to accommodate new recipient processing files. She conducted testing and provided QA support to the testing team within critical staffing and time constraints. She partnered with team members in formulating their test cases to help ensure testing was conducted and completed on time. In addition, she led Acceptance Testing for McKesson HBOC ClaimCheck project in the project leader's absence, helping to ensure required tests were completed successfully in a timely manner.


Tahsin Zakaria, PMP®

| | |
|---|--|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 10 years |
| Certifications and Education: | Bachelor of Arts in Criminal Justice, CUNY John Jay College of Criminal Justice Project Management Institute (PMI) Certified Project Management Professional (PMP®) Amazon Web Services Certified Solutions Architect Professional |

Overview

Tahsin is an experienced leader with more than 10 years' professional history working Medicaid, Federal and State clients, and policy and procedure analysis. As a certified PMP®, he has a successful track record in assisting with risk and issue management, systems integration, and eligibility.

Experience
BerryDunn (08/2022 – present)

Tahsin provides consulting support to the following projects:

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

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

- *West Virginia Peoples' Access to Help (PATH) Project (08/2022 – present)*
Tahsin serves as the State project lead for all PATH Change, Risk, and Issue Management responsibilities. This encompasses ongoing collaboration with vendor (Optum) counterparts and West Virginia DoHS stakeholders; including identification, documentation, coordination, and reporting of changes/risks/issues, and driving their resolution and/or mitigation.

Accenture (04/2022 – 08/2022)

Tahsin served as a Consulting Manager to identify and track upcoming RFP opportunities with Federal and State clients for multi-million-dollar contracts. He worked with leadership and delivery teams to draft and coordinate proposal response on various topics including Project Management, solutioning, system interfaces, enhancements, project delivery cycle and transition.

Deloitte (09/2017 – 05/2022)

Tahsin served as a Systems Integration Consultant to coordinate with clients to identify, design, track and manage change requirements for large scale IES systems implementation efforts



related to Medicaid Eligibility and Enrollment. He served as the discovery lead for 8+ Medicaid/IES client projects, including the Medicaid agencies in Rhode Island, Virginia, Indiana, Washington DC, and New Hampshire. He facilitated JAD sessions to translate customer requirements into solution design, and coordinated development and testing activities amongst globally distributed teams. He managed client expectations and crisis through use of influence, explanation, and trust relationships with business leaders. Tahsin also oversaw and collaborated with team on high overview for child welfare projects / technical solutions, as well as collaborated with leadership to identify new sales opportunities to promote cloud solutions and leading teams to draft various RFP/RFIs for submission. He was a key advisor for client and Deloitte team with regards to validity and prioritization of development/enhancement efforts to meet customer expectations. He led the business service improvement initiative to identify opportunities to automate client legacy and hybrid cloud, proposed technical solutions for Child welfare web infrastructure, and served as the discovery lead for 8+ client projects; coordinated development and testing activities amongst globally distributed teams; and worked with clients to identify, design, develop, and automate business needs to enhance current business process.

Annexa Inc. (03/2017 – 08/2017)

Tahsin served as a Senior Consultant and Systems and Program Policy Specialist to lead a team of five to enhance a case management system for the district-based on federal policy changes for government sponsored programs. He worked with the district to understand business and policy needs to translate into technical requirements.

UnitedHealth Group, Optum Technologies (08/2014 – 03/2017)

Tahsin served as a Senior Consultant and Business Systems Analyst in the Government and Public Sector with the Functional, Development and Testing team to develop an Integrated Eligibility System POC and Medicaid. He led a discovery initiative of federal and state program and policy to design the eligibility platform and system architecture. He managed Operational goals such as developing tracking for leadership team to ensure objectives were met in a timely manner. Tahsin worked with clients to gather requirements, create BRDs, and provided input to Dev/Testing teams. He also conducted demonstrations of the completed IES solution with stakeholders.

HealthFirst New York (10/2012 – 08/2014)

Tahsin worked as an Applications Analyst to review Federal and State program eligibility policies for any changes in Medicaid, QHP, SNAP and TANF and worked with vendor for any system related enhancements for the eligibility application. He assisted the State in identifying, logging, and triaging system defects found in the NYSOH application.



Tamara Batts, MSML

| | |
|--|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Senior Consultant |
| Years of Experience Relevant to Proposed Role: | 12 years |
| Certifications and Education: | Master of Healthcare Administration (In Progress), Western Governors University Master of Management & Leadership, Western Governors University Bachelor of Science, Accounting, Western Governors University |

Overview

Tamara is a senior consultant in BerryDunn's Medicaid consulting practice. She is an eligibility Subject Matter Expert (SME) for the following public benefit programs: Medicaid; Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Aged, Blind, Disabled (ABD).

She has a diverse leadership background in state government, public-private partnership, non-profit organizations, private sector, and independent small business ownership. She is an agent for meaningful change with a lean and agile themed approach. Tamara is well versed in managing projects of varying sizes and budget. Most of her relevant experience was gained working for the State of Washington's Department of Social & Health Services and the Washington Health Benefit Exchange.

Her strengths as a Project Manager include exceptional communication skills, confidence in decision-making, rapid change management skills, and advanced problem-solving skills. Tamara's innate leadership skills and experience allow her to bring calm to the chaos of diverse projects and serve as a conduit for her team's success.

Experience

BerryDunn (09/2022 to Present)

- **West Virginia Department of Human Services**
 - *People's Access to Help (PATH) (01/2024 to Present)*
Tamara is serving as a lead within the Child Support (CS) release, supporting the prioritization of backlog changes and release management as the project transitions into the Maintenance and Operations (M&O) phase of the project.
- **State of Washington's Healthcare Authority**
 - *Apple Health/Medicaid Unwind (03/2023 to 12/2023)*
Served as the Project Manager for the COVID-19 Public Health Emergency Medicaid unwind project.
- **State of Hawaii**
 - *Medicaid Payment Error Rate Measurement (PERM) (09/2022 to*



03/2023)

Served as the lead for the PERM audit project and subject matter expert (SME) for system design releases.

Tanmar Accounting (03/2020 to 10/2022)

Small Business Owner

Served startups and small business owners by providing bookkeeping services, tax prep services, management consulting, healthcare subsidy management consulting, and notary services. She conducted market research and trend analysis, formulated pricing strategies, provided management consulting on business structures and tax benefits, and mentored startup business owners toward success. She managed a team of two bookkeepers to achieve deliverables. Tamara's experience required her to manage projects effectively while wearing multiple hats and balancing her budget.

Washington Health Benefit Exchange (06/2018 to 04/2022)

Appeals Specialist and Eligibility Lead

Served the Washington Health Benefit Exchange (WAHBE) for 4 years as an Appeals Specialist with a dual role as Eligibility Lead for 2 years. Managed a high-volume caseload from intake to final ruling, acting as a representative of the exchange during administrative hearings. Held the position of Eligibility Lead with the WAHBE at the beginning of the COVID pandemic and declaration of the Public Health Emergency (PHE), participated in decision-making for casework and customer communications in accordance with federal PHE guidance on continuous enrollment with proven ability to interpret and implement significant changes in policies and procedures.

Conceptualized and directed the development of WAHBE's internal appeals database and case tracking program by working closely with scrum team developers as well as facilitating efforts with internal and external stakeholders throughout program development.

State of Washington (06/2017 to 06/2018)

Office Manager, Department of Social & Health Services

Supervised both state and contracted staff. Managed supply inventory and coordinated on-site maintenance. Payroll auditing, EBT Card and gas card inventory auditing, Managed safety compliance of multi-building facility. Founded and served as Chairman of the Respect, Equity, Diversity, & Inclusion (REDI) Committee. Served as Chair of the Safety committee and Co-Chair of the Employee Recognition Committee

Lutheran Community Services Northwest (09/2016 to 06/2017)

Fiscal Manager

Medical billing to State of Washington's Medicaid program for caregiving services through ProviderOne. Tracking Medicaid eligibility for elderly and disabled clients. Assigned and managed the work of the accounting department for multiple grant and donation-based community programs such as the refugee cash assistance program. Budget development and preparation for grant applications, established performance measurements and KPI's. Payroll for over 150 staff, Management of A/P, A/R cycles, monthly accounting budgeting and compliance

State of Washington (01/2011 to 09/2016)

Public Benefits Specialist, Department of Social & Health Services



Served the State of Washington, Department of Social & Health Services (DSHS) for 5 years in eligibility services for Medicaid, SNAP, TANF, and ABD. Progressively moving into leadership and Supervisory roles. Heavy emphasis on auditing, change management, hiring procedures, and development of on-site training plans.

Worked in collaboration with DSHS regional trainers across the state to develop case auditing standards across multiple Customer Service Offices (CSO's), assisted in creating training, desk aids, and revised auditing standards during legacy system transition. Collected and analyzed Medicaid, SNAP, TANF, and ABD audit data to create and deliver focused training materials for line staff, contributing to high accuracy rates achieved during federal program audits. Facilitated professional development of staff via consistent coaching and mentoring, leading professional development mentorship meetings, successfully promoted multiple line staff into lead or regional roles.



Vivian de la Gandara

| | |
|---|---|
| Proposed Project Role: | General Project Manager |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 12 years |
| Certifications and Education: | Bachelor of Science, Journalism, University of Florida Associate of Arts, Journalism, Santa Fe Community College |

Overview

Vivian is a strong leader with a portfolio of skill sets developed over the course of more than 24 years working in the Medicaid space both in the private and public sectors. Vivian's experience encompasses all stages of Medicaid Management Information Systems (MMIS) which includes planning, design, development, installation and ongoing maintenance and operations. Vivian's experience includes working with 18 different State Medicaid Agencies (SMAs) and multiple MMIS vendors throughout her career. Vivian also volunteers her time to serve on the Medicaid Information Technology Architecture (MITA) Governance Board (MGB) and participating in workgroups facilitated by the Private Sector Technology Group (PSTG) where she serves as a general member.

Experience

BerryDunn (06/2023 – present)

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *People's Access to Help (PATH) Project (06/2023 – present)*
Vivian is serving as the Certification and Compliance (C&C) subject matter expert (SME) Lead for Berry Dunn. She is responsible for managing the C&C team and leading the review, analysis, and management of certification and compliance and other project related activities and tasks.

MMISME LLC (02/2009 – present)

MMISME LLC is a Florida Limited Liability Company historically underutilized business (HUB) certified both as a minority and woman business enterprise (MBE/WBE) by the State of Florida as well as an MBE with the National Minority Supplier Development Council (NMSDC). The company was first established as a Georgia company under the entity name MMISME Operations Consulting LLC in February of 2009 but was dissolved and reestablished in July of 2011 as a Florida company to relocate its offices to Florida. MMISME LLC offers resources and services in Medicaid and government healthcare related operational and IT areas including strategic planning as well as the systems development, design, testing, implementation, and maintenance phases of an MMIS. Vivian has supported a variety of projects, including:



- **District of Columbia (DC) Department of Healthcare Finance (DHCF)**
 - *MITA State Self-Assessment (SS-A) Project (10/2019 – present)*
Subcontracting partner filling the MITA Lead role on the DC MITA SS-A contract with Earnst & Young (EY). Services include:
 - Developing and updating the MITA Training Plan
 - Developing and delivering initial and refresher MITA training to District SMEs participating in the MITA SS-A update each year
 - Facilitating MITA workshops and capture SME assessment levels for each MITA business process annually
 - Leading the effort in writing the District's MITA SS-A Final Report each year, which includes:
 - Writing Findings Summary and Gap Analysis
 - Updating the District's MITA Concept of Operations (COO)
 - Updating the District's MITA Roadmap
 - Producing the updated MITA SS-A Profiles from assessment data
- **Mississippi Division of Medicaid (DOM)**
 - *MMIS Replacement Project (MRP) (09/2018 – 12/2022)*
Contracted role providing oversight of the federal certification process for Cambria Solutions Inc. on the MRP Project Management Office (PMO) following the MECT 2.3 guidelines for the first milestone review then switching to the SMC process for the Operational Readiness Review (ORR) and final Certification Review. Responsible for providing DOM federal certification related expertise and guidance on the project. Services include:
 - Supporting DOM with federal certification related tasks including:
 - Monitoring the federal certification status for each milestone review
 - Participating in federal certification planning
 - Facilitating and documenting federal certification meetings
- **Puerto Rico Department of Health (PRDoH)**
 - *Puerto Rico MMIS (PRMMIS) Project Management (01/2016 – 09/2021)*
Contracted role providing oversight of federal certification process for the Puerto Rico MMIS (interChange) Module 1 under MECT 2.3 and the OBC Pilot on behalf of the Puerto Rico Medicaid Program (PRMP) PMO as well as provide MITA-related expertise and guidance on the project for Intervoice. Services include:
 - Providing MITA-related expertise and guidance to the project
 - Assisting the PMO in developing project status reports for the PRDoH
 - Assisting in the preparation of the CMS biweekly status reports and presentations for the monthly PRDoH Steering Committee
 - Documenting and tracking action items, risks, and decisions



- Providing technical writing services
- Assisting in the development and finalization of the implementation advanced planning document (IAPD), advanced planning document update (IAPD-U), and Operations Advanced Planning Document (OAPD)
- Overseeing the federal certification process for the PRMMIS
- Assisting with requirements definition for PRMMIS Module 2 Release
- **Louisiana Department of Health (LDH)**
 - *Louisiana PPMO Project – Provider and Eligibility & Enrollment (LaMEDS) Modules (07/2019 – 08/2020)*
Contracted role providing support to LDH with respect to certification of the Provider and Eligibility and Enrollment (E&E) solution modules serving on the states Enterprise PMO using the OBC process that LDH was piloting.
Certification related tasks including:
 - Monitoring the federal Certification status
 - Participating in federal Certification planning meetings with LDH and CMS/MITRE
 - Facilitating and documenting federal Certification meetings with LDH and CMS/MITRE
 - Preparing LDH for final review demonstrations
 - Reviewing and providing feedback on evidence being provided to CMS/MITRE
 - Participating in Final Review Meeting
 - Supporting follow up with LDH action items that came out of the final reviews
- **Alaska Department of Health and Social Services (DHSS)**
 - *Alaska MITA SS-A Project (09/2019 – 06/2020)*
Contracted role providing SME Services for Brilljent to support the MITA 3.0 Assessment of the Alaska DHSS Medicaid Enterprise.
- **Florida Agency for Health Care Administration (AHCA)**
 - *Strategic Enterprise Advisory Services (SEAS) Project (10/2017 – 07/2018)*
Subcontracting partner providing oversight of federal certification process following the MECT 2.3 guidelines as well as providing MITA-related expertise and guidance on the SEAS project for Cambria Solutions Inc. Services included:
 - Performing the 2018 MITA 3.0 SS-A
 - Developing an ongoing MITA SS-A update process for AHCA
 - Facilitating MITA workshops to assess the As-Is and To-Be maturity levels of the AHCA Medicaid business processes
 - Preparing summary workshop reports to document the As-Is and To-Be assessments



- Completing the eSS-A Scorecards and Profiles for the Business, Information and Technical architectures (BA, IA, and TA)
- **Kentucky Cabinet for Health and Family Services (CHFS)**
 - *IV&V Services, Kentucky Medicaid Enterprise Management System (MES) Project (07/2016 – 09/2016)*
 - Contracted role serving as a MITA SME and Technical Writer on the IV&V Services, Kentucky MES Project for CSG Government Solutions. Assisted in updating CHFS' MITA SS-A and-related artifacts necessary for the federal certification project initiation milestone review. Services included:
 - Assisting CHFS in updating and finalizing the MITA SS-A-related artifacts
- **Virginia Department of Medicaid Assistance Services (DMAS)**
 - *MMIS Procurement Assistance Project (12/2015 – 06/2016)*
 - Contracted role on the MES request for proposals (RFPs) assistance on the Virginia DMAS Procurement Support Project for CSG Government Solutions. Services included:
 - Serving as a Technical Writer assisting Virginia DMAS with the development of its RFP development for the following modules: Financial, Integration, Enterprise Data Warehouse (EDW) and Fee-for-Service (FFS)
- **Indiana Family and Social Services Administration (FSSA)**
 - *ICD-10 Remediation Project and MITA Refresh Project (01/2015 – 12/2015) and (08/2014 – 12/2014)*

Contracted role providing SME support on FSSA's ICD-10 implementation and MITA refresh for CSG Government Solutions. Services included:

 - Serving on the FSSA ICD-10 project, helping the FSSA PMO with project-related tasks pertaining to the successful implementation of ICD-10
 - Serving as the MITA SSA Lead/Project Manager, leading the Indiana FSSA MITA SS-A refresh efforts necessary to produce and update MITA-SS-Report for the State of Indiana
- **Florida AHCA**
 - *Medicaid Research and Planning, ICD-10 Assessment and Transition Projects (05/2012 – 09/2013) and (08/2014 – 12/2014)*

Contracted role serving as the ICD-10 Team Lead on the ICD-10 Assessment and Transition projects for CSG Government Solutions. Oversaw a team of analysts who completed an impact assessment and helped with remediation efforts associated with the transition from ICD-9 to ICD-10 on the Florida MMIS (InterChange) and other AHCA systems and operations managed by the agency. Services included:

 - Leading the gap assessment analysis related to handbooks and reports
 - Managing gap assessment analysis inventory
 - Facilitating Remediation Meetings with AHCA Policy Staff



- Documenting decisions
- Coordinating remediation activities for AHCA Policy Staff
- Participating in leadership meetings providing Remediation Status updates

Also provided contracted services for the Florida Medicaid Research and Planning Project for CSG Government Solutions. Served as the SS-A Lead for the AHCA MITA SS-A update effort. Services included:

- Developing and delivering training state SMEs on MITA principles
- Facilitating MITA meetings with SMEs to assess levels for each MITA business process
- Documenting findings for each MITA business process assessed
- Leading the effort in writing the State of Florida's MITA SS-A Final Report, which included:
 - Writing Findings Summary
 - Reviewing entire content of the report
 - Updating the Florida MITA COO
 - Updating the Florida MITA Roadmap
 - Producing the updated MITA SS-A Profiles from assessment data
- Participating in writing and presenting project deliverables
- Creating training materials as well as training staff on how to use technical tools for the project

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

- *MMIS Modernization Project (10/2013 – 05/2014)*

Contracted role serving as the MITA Lead for the Minnesota MMIS Modernization Project for CSG Government Solutions. Services included:

- Leading the DHS MITA SS-A
- Creating and training state SMEs on MITA principles
- Facilitating MITA meetings with SMEs to assess levels for each MITA business process
- Documenting findings for each MITA business process assessed
- Leading the effort in writing the state of Minnesota's MITA SS-A Final Report, which included:
 - Writing Findings Summary
 - Reviewing entire content of the report
 - Developing and creating the Minnesota MITA COO
 - Developing and creating the Minnesota MITA Roadmap
 - Producing of the MITA SS-A Profiles from assessment data

- **Centers for Medicare and Medicaid Services (CMS)**

- *MITA 3.0 Upgrade Project (03/2011 – 07/2011)*



Contracted role providing technical writing services to support the CMS MITA 3.0 Upgrade Project. MMISME LLC worked closely with industry SMEs to update the Centers for CMS MITA Framework documentation from Version 2.1 to Version 3.0 for CSG Government Solutions. Services included:

- Completing writing tasks associated with the IA section of the publication, as well as the SS-A Companion Guide
- Conducting peer reviews of other sections of the publication, including the BA and TA
- Serving as the graphics editor, updating, and maintaining graphics for the entire publication
- Assisting with the creation of the MITA-related 2011 Medicaid Enterprise System Conference (MESCC) presentation material presented by CSG and CMS



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 Degree, emphasis in English Literature, Marshall University Associate of Arts Degree, emphasis in English, West Virginia University Parkersburg Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II) |

Overview

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

Experience

BerryDunn (06/2021 – present)

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



- **State of WV**

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

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

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

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

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

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

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

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

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



and documentation needs.

West Virginia Department of Human Services (DoHS)

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

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

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

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

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

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

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



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

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



Eileen Gardner

| | |
|---|---|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 10 years |
| Certifications and Education: | Bachelor of General Studies (BGS), University of Missouri, Columbia Registered Work Comp Specialist, National Council on Compensation Insurance (NCCI) |

Overview

Eileen is a project coordinator and consultant in BerryDunn's Government Consulting Group, focused on providing project coordination and project management support, research, and facilitation. Eileen brings more than 30 years of senior-level office management experience, and over ten years of project management and analysis services to Medicaid clients, including over five years in the Missouri (MO) Medicaid Management Information System (MMIS) healthcare application and over four years in the Missouri Eligibility Determination & Enrollment System (MEDES) healthcare application.

Experience

BerryDunn (12/2017 – present)

As a project coordinator, Eileen supports the following projects:

- **State of West Virginia (WV)**
 - **WV Department of Human Services (DoHS)**
 - *People's Access to Help (06/2023 – present)*
Eileen serves as Project Management Support Staff to support People's Access to Help (PATH) project. She will be assisting in the organization of and preparation for meetings, attending meetings and maintaining a written record of discussions, and supporting daily project coordination activities.
- **Puerto Rico**
 - **Puerto Rico Department of Health (PRDoH)**
 - *Enterprise Objective Monitoring and Control (EOMC) (8/2022 – present)*
Eileen serves as a project coordinator for the PRDoH EOMC project. She assisted the project team through the certification review process. She now assists the Integrated Medicaid Enterprise Systems (IMES) and Payment Error Rate Measurement (PERM) project teams in editing Centers for Medicare & Medicaid Services (CMS) documents, EOMC Roadmap, risks, issues and decisions, Data Governance Plan, writing team process documents, updating spreadsheets, and recording meeting minutes.
- **MO Department of Mental Health (DMH)**



- *MO DMH EHR Business Planning Project (09/2021 – 05/2023)*
Eileen served as a part-time project coordinator for the MO DMH EHR Business Planning project. She assisted the team with editing business processes, performance deliverable plans, and recording meeting minutes.
- **MO Office of Administration (OA) ERP**
 - *MO OA ERP Implementation (09/2022 – 05/2023)*
Eileen served as a part-time project coordinator for the MO OA ERP Implementation. She assisted the project manager by drafting and updating the project's Weekly Status Report (WSR), scheduling meetings, and recording meeting minutes.
- **MO HealthNet Division (MHD)**
 - *Missouri Medicaid Enterprise (MME) Program Management Office (PMO) (12/2017 – present)*
Eileen serves as the project coordinator for the MME PMO and the Business Intelligence Solution–Enterprise Data Warehouse (BIS-EDW) project. She assists the project manager on a team that assesses project health, reviews project deliverables, evaluates and edits vendor management plans, reviews Independent Verification and Validation (IV&V) progress reports, assists in identifying potential risks, issues, and decisions, manages the document repository, records meeting minutes, and writes the project's MME PMO WSR.

Brilljent, LLC (05/2016 to 12/2017)

Division of Family Services

MEDES PMO

Eileen served as the project management analyst on the MEDES project for the PMO, where she was accountable for schedule management, recording meeting minutes, decisions, action items, and risks and issues for the project. She provided oversight and management of the project's document repository. Prior to this position, she served as the project coordinator responsible for assisting the project manager in all phases of project oversight.

ENTAP, Inc. (12/2015 – 05/2016)

Division of Family Services

MEDES PMO

Eileen worked as a project coordinator on the MEDES project.

EngagePoint, Inc. (07/2013 – 07/2015)

Division of Family Services

MEDES PMO

Eileen held multiple positions with EngagePoint. As a senior project specialist, she provided leadership and guidance in the project's implementation and maintenance to include recruiting and resource onboarding, facilities management, security setup, vendor maintenance, and timesheet reporting. She controlled, managed, and approved all resource onboarding for the MEDES project.



Missouri Employers Mutual (MEM) (06/2008 – 01/2013)

Eileen provided high-level support for two senior-level executives during her five years at MEM, along with managing committee assignments and organizational goals and objectives.

University of Missouri – Columbia (01/2007 – 06/2008)

Eileen provided high-level support for the Art Department chairman in managing schedules, the department's budget, and staff timekeeping. She assisted in developing the department's classes and scheduling teaching assistants, and she supervised three staff.

US House of Representatives – MO Congressman Kenny Hulshof (11/2004 – 06/2006)

Eileen managed the Washington, D.C., office of Congressman Kenny Hulshof, where she coordinated all schedules for the congressional representative and the D.C. office legislative staff. She managed the office correspondence, budget allocation, travel arrangements, and staff payroll.

Boone Hospital Center – Boone Hospital Foundation (06/2002 – 11/2004)

Eileen provided high-level support for the Boone Hospital Foundation director to manage the organization's goals and objectives. She provided accountant maintenance, organized, and managed direct mail campaigns, fundraising objectives, and managed the Boone Hospital Foundation Board meetings and assignments.

University of Missouri – Columbia

- **School of Medicine (12/1999 – 04/2002)**

Eileen provided high-level support for the dean of the School of Medicine and assisted in managing the office, travel arrangements and expense reports, and hospital committee assignments.

- **College of Arts and Science (04/1992 – 06/1999)**

Eileen provided high-level support for the Executive Director of Advancement and managed the college's fundraising goals and objectives. She provided account management, direct mail campaigns, special event planning, management, and event wrap-up for the 31 college departments.



Hailey Holden

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

Overview

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

Experience

BerryDunn (07/2022 to present)

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

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

- *West Virginia Engagement Coordinator (07/2022 – present)*
As the Engagement Coordinator, Hailey is responsible for updating and maintaining a variety of documents including master project trackers, funding trackers, and project timelines. She collaborates with team members to develop, update, and/or maintain policies and procedures, firm and engagement templates, and documentation related to process improvements. She also collaborates with the consultants and project managers to create and process staffing requests to the WV client, as well as tracking the requests and approvals. Hailey also works alongside team members and the New Business Development team to create, update, and maintain resumes as it relates to staffing requests. She performs a variety of overflow project coordination duties, such as creating meeting agendas, taking meeting notes and making updates as needed, and documenting service level agreements.
 - *Partnership Management Support Project (12/2023 – present)*
Hailey currently assists with leverage and reuse initiatives and provides project management support.
 - *Advanced Planning Document (APD) Support Project (05/01/2023 – present)*
Hailey assists in compiling, tracking, and reviewing a variety of APDs.
 - *Provider Management Support Project (01/2023 – 10/2023)*
Hailey worked on leverage and reuse initiatives for WV and the United States Virgin Islands including support with compiling and reviewing APDs.



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

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

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

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

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

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



Jonathan Pryor

| | |
|--|--|
| 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 Computer Engineering, Shawnee State University |

Overview

Jonathan is an experienced project coordinator with a demonstrated proficiency in managing operational and logistical tasks while focusing on client needs. He brings experience and deep knowledge both in field and technical operational tasks to all projects and is a well-versed and effective communicator, allowing him to build and sustain successful relationships with clients and vendors. Jonathan's advanced analytical skillset and keen attention to detail allow him to demonstrate superb proficiency in documentation, reporting, and scheduling needs of projects. Jonathan excels at both creating and adapting to logical and creative solutions to help streamline everyday business tasks.

Experience

BerryDunn (09/2023 – present)

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

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

- **WV People's Access to Help (PATH) (09/2023 – present)**

Jonathan serves as a project coordinator supporting the PATH project. He assists in the organization of and preparation for meetings, including drafting, developing, and distributing meeting materials, attending meetings, tracking action items, decisions, risks, and issues, and maintaining a detailed written record of discussions in accordance with project service level agreements (SLAs).

Ripley's Premium Lawncare, LLC (01/2023 – 08/2023)

Jonathan served as the operations manager and managed daily operation needs of the company, sent quotes to customers, and also set weekly schedules. He was also responsible for resolving complaints and meeting customer satisfaction expectations.

American Power Company (10/2021 – 01/2023)

Jonathan was an OSHA-Certified utility field technician lead and coordinator. He demonstrated strong customer service skills and was detail oriented with daily documentation. Jonathan accurately assessed the condition and integrity of poles, lines, and transformers. He effectively relayed real-time information to engineering teams and field coordinators. Jonathan was responsible for working efficiently to stay on time and task without direct supervision, gave detailed reporting, and assisted with scheduling and coordination tasks.



Day Trader/Stock Market Trader (01/2020 – 10/2021)

Jonathan worked as a highly skilled stock market trader, utilizing his extensive knowledge of markets and how stocks are influenced by current events. He demonstrated a strong understanding of fluctuations and engaged in careful analysis to determine placing buys and selling orders. He demonstrated excellent analytical and statistical modeling skills as well as a keen ability to determine when to place purchase and sell orders to brokers.

Total Quality Logistics (01/2016 – 01/2020)

As a senior account executive and coordinator, Jonathan managed daily meetings and updates of logistic needs and business accounts. He helped deliver creative solutions to solve or simplify everyday business. Jonathan provided clients with the highest level of customer service, managed daily shipments and deliveries, and was a strong multi-tasker. He participated in direct business-to-business sales, establishing a top-tier book of business and relationships with customers both international and domestic.

Health Smart Benefit Solutions (09/2015 – 01/2016)

Jonathan worked as a customer service representative and effectively managed a high volume of inbound/outbound customer calls in a complex, fast-paced call center environment. He accurately documented information and researched and resolved customer service issues. Jonathan initiated operations improvement to improve call center productivity and assisted in training new employees.



Katelyn Smith

| | |
|--|--|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 10 years |
| Certifications and Education: | Credits toward degree in Business and Marketing, University of Rio Grande Individual, Accident, Health, and Life Insurance license through the State of Ohio, 2016-2019 |

Overview

Katelyn is an experienced consultant with strong skills in customer service, detailed documentation, and coordinating and communication. She has worked in various healthcare and insurance settings to train others, research and review claims and payments, and create resources.

Experience

BerryDunn (05/2022 – present)

- State of West Virginia (WV)

- WV Department of Human Services (DoHS)

- People's Access to Help (PATH) Project (05/2023 – present)

Katelyn is the deliverables business analyst for the project. She has a variety of responsibilities that include communicating with key stakeholders, gathering, reviewing, analyzing, and processing business data, liaising between various departments and clients, maintaining documentation regarding various projects, processes, and operations, tracking documentation, and collaborating with project managers and cross-functional teams. Previously, Katelyn worked as a project coordinator for the project and had a variety of responsibilities, including organizing daily meetings for team organization, overseeing daily project coordination activities, 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).

Orthopedic and Neurological Consultants (05/2017 – 05/2022)

Katelyn worked as an Executive Assistant responsible for answering a high volume of phone calls in a timely manner helping to ensure quality service. She maintained and monitored compliant and detailed medical documentation, managed medical files, and scheduled and confirmed patient appointments and surgeries. She maintained multiple calendars, ensured compliance with procedures, and used medical software, CPT coding, medical billing, prior authorizations, appeals, workers compensation claims. Katelyn was responsible for keeping up to date with changes in medical and insurance legislation and collaborating with physicians to help with medical examinations, schedule testing, and order supplies.



In addition to her role, Katelyn served as an Executive Assistant Trainer responsible for assisting the management team with first line training of new hires within the executive assistant role, teaching core competencies and work standards, reviewing job specific training, and providing updates as needed. She gave feedback to new hires and their managers regarding their performance and behaviors upon observations and participated in weekly reviews of new hires with their managers for their first 90 days. Katelyn identified resources to help new hires with specific challenges, coached new hires on how to resolve issues, and managed detailed reporting, note-taking, communication, scheduling, and coordination.

Ohio Insurance Services (02/2016 – 05/2017)

- *Funding Administrator (02/2016 – 05/2017)*
Katelyn worked as a Funding Administrator responsible for helping to ensure timely, comprehensive, and compliant funds between the members and the company. She monitored the payment of all deductible and co-pay claims to the member, investigated, evaluated, and settled submitted claims, and researched explanation of benefits for the member. Katelyn helped to ensure claims were not fraudulent, calculated funds, and decided the appropriate amount the insurance company should pay. She developed expertise in financial reporting, filing appeals, and creating monthly invoices for various entities.
- *Receptionist (08/2014 – 02/2016)*
As Reception, Katelyn welcomed customers, provided customer service, and managed inbound/outbound calls. She scheduled and coordinated needs for clients and agents, created detailed notes, and maintained heavy documentation.


Katie McDonald, MBA

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

Overview

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

Experience
BerryDunn (05/2022 – present)

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

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

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



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

Katie assists with MITA lifecycle maintenance activities, including developing new business process improvement flows and updating MITA related reports.

- *Provider Enrollment (PEA) Project and Provider Management Support
(08/2023 – 10/2023)*
Katie provided project coordinator assistance with planning, developing, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *Advance Planning Document (APD) Consulting Project (05/2023 – present)*
Katie provides project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *PATH DDI Project Management (03/2023 – present)*
Katie provides project coordinator assistance with implementing the PATH system. Katie helps with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.
- *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*
Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DHHR's agreement with the DOJ, now in its fourth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

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

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



Kourtney Kirk

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

Overview

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

Experience

BerryDunn (10/2022 – present)

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

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

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

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

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

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



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

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

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

TEKSystems (08/2020 – 01/2022)

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

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

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

Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AEs 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.



Krista "Rosie" Owens, MS

| | |
|--|---|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 5 years |
| Certifications and Education: | Master of Science in Curriculum & Instruction, Western Governors University Bachelor of Arts in Interdisciplinary Studies, Western Governors University Associate in Science, Trident Technical College |

Overview

Krista is an experienced teacher with comprehensive knowledge of technology. She excels at developing and maintaining relationships, conducting data analysis, and coordination and management.

Experience

BerryDunn (04/2022 – present)

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

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

- **People's Access to Help (PATH) Project (04/2022 – present)**

Krista is the Child Welfare Release Coordinator for the project. She has a variety of responsibilities, which include organizing daily meetings for the Child Welfare team, overseeing project reports and updating prioritization trackers, logs, and spreadsheets. She also keeps in communication with business coordinators and leadership to help ensure the workflow of the project stays in a positive alignment. She provides quality control for internal and external Child Welfare documents and helps to ensure said documents are up to date and meet expectations. She facilitates weekly meetings with clients to discuss project topics as needed. Krista has also functioned as a project coordinator with a variety of tasks, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

Kanawha County Public Schools (10/2019 – 04/2022)

Krista worked as a full-time teacher holding training sessions for technology incorporation and team leaders, as well as serving as a mentor teacher for new or beginning teachers. She scheduled and coordinated meeting set-ups, created professional development for Schoology and implemented efficient teaching strategies. In addition, she managed 20-28 students' work, deadlines, and provided additional support as needed. During her time there, Krista implemented school-wide Google Suite services. She also implemented new technological ways



for e-learning and in-person learning, facilitated guiding reading and guided math within the classroom, and created individualized goals and learning objectives. She acted as pilot for new curriculum and led trainings. Krista utilized cooperative learning techniques and provided individual instruction to meet the needs of students with diverse learning needs. She maintained documentation for both internal / external classroom needs (parent – teacher conferences and staffing meetings etc.) notetaking for daily / weekly meetings task and detailed oriented.

Suffolk Public Schools (06/2017 – 10/2019)

Krista worked as a full-time teacher in general education and gifted classroom to facilitate effective classroom management techniques, implement efficient teaching strategies, and schedule and coordinate internal and external meetings. She provided a safe and clean educational classroom while creating fun and educational lessons combining whole brain instructions and games. She implemented IXL and Prodigy effectively into the classroom as supplemental resources and facilitated guiding reading and guided math within the classroom. Krista also utilized cooperative learning techniques and provided individual instruction to meet the needs of students with diverse learning needs. This job entailed heavy documentation for both internal / external classroom needs (parent – teacher conferences, staffing meetings etc.) notetaking for daily / weekly meetings task and detailed oriented.



Morgan Krieger

| | |
|--|---|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 5 years |
| Certifications and Education: | Bachelor of Science in Journalism, West Virginia University |

Overview

Morgan is a professional with expertise in Medicaid health system implementation, proficiency in management, and stakeholder involvement. She is competent in doing extensive research and assessment to support evidence-based policy decisions. She is able to work well as a team to establish trust and guarantee project success with a variety of stakeholders and brings over five years' experience applying these skills to project teams.

Experience

BerryDunn (10/2021 – present)

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

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

- *People's Access to Help (PATH) Maintenance and Operations (M&O) Project Management (05/2023 – present)*

Morgan works as the M&O Manager for the WV PATH project's Bureau for Social Services (BSS). She managed the BSS team post system implementation and continues to manage M&O for an Integrated Eligibility System (IES). Morgan facilitates tasks and establishes and enforces standards of conduct to her team of subject matter experts. She serves as the primary liaison to third-party vendors' implementation teams and coordinates completion of tasks among cross-functional stakeholders. She communicates complex technical and functional concepts diplomatically and effectively with diverse audiences, individuals, and teams, including third-party vendors, project management, and senior leadership within DoHS. Morgan oversees technical expertise and guidance on Medicaid eligibility, enrollment, and coverage strategies to optimize Medicaid health systems within BSS. She forms collaborative project teams and develops plans and strategies to successfully execute processes that support M&O.

- *PATH DDI Project Management (03/2022 – 05/2023)*

Morgan worked as the release coordinator for the WV PATH project's BSS release. She supported the management of the BSS team through the stages of design configuration, system and user testing, and system implementation for a new IES. Morgan facilitated meetings with client stakeholders, maintained and provided written and verbal reporting on the Child Welfare (CW) project status to leadership and client stakeholders, and assisted with the coordination of task assignments based upon management in adherence to a project plan. She also maintained communication with the client, the vendor, and with colleagues to help ensure



satisfactory services were provided to the client in accordance with the project timeline.

- ***Eligibility and Enrollment Implementation Assistance (09/2021 – 03/2022)***
Morgan worked as a project coordinator in support of the WV Children's Health Insurance Program (WVCHIP) and PATH projects. She assisted in the organization of and preparation for meetings, attended meetings both on behalf of the client and in conjunction with the client and maintained a written record of discussions, and oversaw daily project coordination activities. Morgan developed and documented process flows to enhance project management processes and facilitated meetings to streamline the review process for deliverable materials. Morgan also provided quality control for meeting materials to satisfy the Service Level Agreements (SLAs).

Shuman McCuskey Slicer (11/2019 – 10/2021)

Morgan worked as a marketing coordinator to develop and maintain the firm's internet presence through rebranding, web redevelopment, social media, and biographical enhancements on third-party websites. Her role required meticulous documentation, coordination and scheduling, and she was in charge of all firm public relations, including announcements, advertisements, community involvement, charitable contributions, and sponsorship on behalf of the firm and members. She identified and arranged speaking engagements, seminars, conferences, and continuing legal education classes to help attorneys market their area of expertise and prepared visual and handout materials for these events. Morgan also conducted professional development opportunities for attorneys and developed, managed, and distributed targeted emails, quarterly electronic newsletters, client surveys, and other promotional activities for current, former, and potential clients.

Capitol Market (07/2019 – 11/2019)

Morgan worked as a marketing manager and project coordinator to plan and manage content, graphics, and production of marketing, fundraising, and campaign materials. She wrote and edited compelling communication materials, including internal communications with the board of directors, and external marketing documents, website, and social media, aimed at donors, volunteers, and other external audiences, which entailed heavy documentation. Morgan coordinated the annual signature event that raised \$75,000 and attracted 150 attendees, helped create, expand and/or coordinate approximately 15 events for donors and/or the general public, and managed day to day operations.

I Love Nice People, Inc. (08/2016 – 01/2020)

Morgan was the Co-Founder of a 501(c)3 non-profit social awareness clothing brand. She managed all documentation / coordination needs and designed a line of ethically made trademarked apparel and accessories. She directed activities of business pertaining to production, pricing, marketing, sales, and distribution of products while also developing and maintaining an internet presence through social media and an e-commerce shop.

Charleston Area Alliance (05/2017 – 01/2018)

Morgan worked as a marketing and communications assistant to write and edit brochures, postcards, profiles, newsletter content, and email campaigns. She managed social networking accounts and collaborated with designers, printers, and other vendors to carry jobs from design



to completion. Morgan also assisted with research, analysis, and planning that helped the organization to better communicate with its demographic.

Dorie Simmonds Literary Agency (01/2016 – 05/2016)

Morgan worked as a literary intern that communicated findings of unpublished works and authors with agents. She evaluated writer's work to determine its value for representation and insightfully selected manuscripts from unknown authors with trending concepts, popular topics, and quality writing.



Muriah Nutter

| | |
|--|--|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 3 years |
| Certifications and Education: | Associate Degree in Applied Science, focus in Criminal Justice, Pierpont Community and Technical College |

Overview

Muriah is an organized and dedicated project coordinator with proven track record of providing exceptional customer service in fast-paced environments. She has a strongly developed skills in strategic planning, spreadsheet development, office management, relationship building, and data archiving.

Experience

BerryDunn (02/2023 – present)

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

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

- *WV People's Access to Help (PATH) (09/2023 – present)*

Muriah serves as a project coordinator supporting the PATH project. She assists in the organization of and preparation for meetings, including drafting, developing, and distributing meeting materials, attending meetings, tracking action items, decisions, risks, and issues, and maintaining a detailed written record of discussions in accordance with project service level agreements (SLAs).

Greenbrier County Homeland Security & Emergency Management (07/2020 – 02/2023)

Muriah served as an Administrative Assistant and Coordinator to record meeting minutes to provide historical account of actions, measure progress against strategic plan and drive accountability. She answered multi-line phone system, routing calls, delivering messages to staff and greeting visitors. She also monitored office calendars to plan meetings, activities, and travel to maximize productivity; executed record filing system to improve document organization and management; and provided exceptional customer service skills/ situational awareness. Excellent time management skills and memory. Muriah helped with over 10 FEMA projects, and created spreadsheets using Microsoft Excel for daily, weekly, and monthly reporting.

First Neighborhood Bank (01/2019 – 06/2020)

Muriah worked as a Bank Teller who sold and cross-sold bank products to new and existing customers. She assisted customers with setting up or closing accounts, completing loan applications, and signing up for new services. Muriah provided customer records, account statements and copies of checks, documentation reporting, scheduling and coordinating for internal / external meetings.

Buckle, INC. (01/2015 – 01/2019)



Muriah served as Operations Manager to liaise with store managers to set up visually appealing layout for store merchandise. She controlled shipments, inventory, purchasing and inspection to reduce workflow gaps, and oversaw preparation and distribution of promotional materials and flyers. She established customer relationships and helped complete purchases, locate items and join reward programs. Muriah also trained new associates on cash register operations, conducting customer transactions and balancing drawer.



Ryan Daniels

| | |
|---|---|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Consultant |
| Years of Experience Relevant to Proposed Role: | 16 |
| Certifications and Education: | Computer Science and Communications, Shawnee State University |

Overview

Ryan is an experienced project coordinator with strong customer service and communication skills. Managing daily meetings, coordinating daily operational needs, and developing and training new hires, Ryan is an effective and efficient individual whose passion for conflict resolution makes him an asset to his team. In addition, Ryan utilizes his ability to schedule and coordinate appointments, provide clients with the highest level of customer service, and multi-task to meet goals.

Experience

BerryDunn (01/2024 – present)

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

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

- *WV People's Access to Help (PATH) (09/2023 – present)*

Ryan serves as a project coordinator supporting the PATH project. He assists in the organization of and preparation for meetings, including drafting, developing, and distributing meeting materials, attending meetings, tracking action items, decisions, risks, and issues, and maintaining a detailed written record of discussions in accordance with project service level agreements (SLAs).

EDA Logistics, LLC (08/2020 – present)

Ryan is the owner and logistics coordinator. He is responsible for every aspect of the business including marketing, customer acquisition, customer service, operations, accounts receivable and accounts payable. He manages daily operation needs, quotes customers, and sets up weekly schedules.

Total Quality Logistics (01/2016 – 05/2020)

As a sales team leader and account executive, Ryan was responsible for heavy documentation, scheduling, and coordinating internally / externally. He managed daily meetings/updates of Logistic needs and business accounts and also delivered creative solutions to solve or simplify everyday business needs. Ryan provided clients with the highest level of customer service and never missed a deadline. He managed daily shipments and confirmed delivery status. He did 6 months of comprehensive training in the transportation industry and 3 months of advanced logistics and sales training. Ryan did direct business-to-business sales establishing a top-tier book of business and relationships with customers/shippers/receivers and motor carriers in my



office. Ryan developed new brokers and was responsible for training and onboarding new hires. He exceeded company performance goals year-over-year.

Northwestern Mutual (07/2015 – 12/2016)

As a financial representative, Ryan effectively and efficiently managed a high volume of inbound/outbound customer calls in a complex, fast-paced, and challenging call center environment. He guided clients toward financial security while building relationships with clients and trying to truly understand their desires and tailored long-term plans to protect, accumulate, and distribute wealth. Ryan maintained a professional attitude towards daily work and environmental situations and also addressed and resolved customer product complaints professionally and with empathy.

Combined Insurance of America (04/2015 – 07/2015)

As an insurance producer, Ryan was responsible for prospecting for clientele using all avenues provided and writing quality insurance to both consumer and corporate clients. He attended weekly meetings, hit monthly goals, and developed processes and plans in order to execute and provide quality customer service to my clients to be an asset to both my clients and employer.

Frontier Telecommunication Company (10/2008 – 04/2015)

Ryan served as a universal sales consultant. He provided service to clients from consumer to corporate backgrounds helping meet all their telecommunications needs. Strong customer service, heavy documentation, and coordination. His daily tasks included fielding inbound calls from our clients and using social and verbal skills to develop rapport while learning the needs and wants of clients. The close of the sale also required order entry skills using Salesforce software. Ryan also served as a subject matter expert for one year training new hires on the sales process, systems, and how to troubleshoot the new operating systems.

Ecolab QSR Division (09/2007 – 11/2008)

As the territory sales representative, Ryan was responsible for parts of WV, KY, OH, and VA serving over 500 quick-service restaurants in the area. He was also responsible for scheduling biannual visits to each location for upkeep, and relationship maintenance. This role required him to be involved in the total installation of a chemical cleaning program that encompassed all facets from floors to grills, to even parking lots. Ryan physically installed dispensers, using tools to tie into plumbing etc. then provided hands-on training to the staff on how to use each product and dispenser to help meet health code standards and kept the store operating.

Giant Auto Group of Ashland, KY (03/2007 – 08/2007)

As a Certified Mercedes-Benz Sales Consultant, Ryan was responsible for prospecting clients, placing sales calls, and developing client-customer relationships with the objective of understanding client needs versus wants that balanced with their financial situation and using that understanding to close the sale.


Shandia Benke, ECBA™

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

Overview

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

Experience
BerryDunn (04/2018 – present)

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



(04/2018 – 02/2019)

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 to 2016)*
As a teacher, Shandia taught a range of subjects, including 6th Grade Grammar and Composition; 7th Grade Literature; Life Fitness; High School Psychology; Keyboarding; and Introduction to Computers.
- *Dean (2012 to 2015)*
As a dean, Shandia managed the character education program and provided support to students, families, and faculty.

Hentges Tree Service (2013 – 2015)



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

Wells Fargo Home Mortgage (2012)

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



Alycia Minshall

| | |
|--|--|
| Proposed Project Role: | Project Management Support Staff |
| Role at BerryDunn: | Editor |
| 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 10 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

Experience

BerryDunn (8/2022 to 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 to 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 to 8/2021)

- Senior Editor (6/2020 to 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 to 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 to 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 to 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 to 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 to 12/2011)

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

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, and manage 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 to 12/2011).*

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



Caitlin Cabral

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

Overview

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

Experience

BerryDunn (09/2021 – present)

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

QualityMetric (08/2020 – 09/2021)

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

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

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

True Colors, Inc. (01/2019 – 05/2019)

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



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

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



Carole Ann Guay

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

Overview

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

Experience

BerryDunn (10/2014 to present)

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

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



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

Webber Energy Fuels (2004 – 2014)

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



Emily Hendrickson

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

Overview

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

Experience

BerryDunn (07/2017 – present)

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

Christianbook (06/2021 – present)

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

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

As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant



content for tone, clarity, and structure and performed information-gathering to revamp text and fact-check quoted material.

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

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

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

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

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

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

Civil Consultants (09/1999 – 07/2014)

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

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

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



Janine DiLorenzo

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

Overview

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

Experience

BerryDunn (01/2022 – present)

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

Breakwater School (08/2019 – 08/2021)

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

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

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

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



- *AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 – 08/2013)*
 Janine coordinated communications and logistics among five committees in a cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and 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.



Jonathan Williams

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

Overview

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

Experience
BerryDunn (02/2019 – present)

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

Freelance Proofreader and Copyeditor (11/2010 – present)

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

Midwest Tape (11/2004 – present)

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

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

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

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

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



Jordan Ramsey

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

Overview

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

Experience

BerryDunn (07/2019 – present)

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

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

Portland Adult Education (2019)



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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

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

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

The Southern Illinoisan (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

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

- **Hardin County, IL**

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

- **NOVA Group of Japan**

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



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.



Megan Hamilton

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

Overview

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

Experience

BerryDunn (12/2022 – present)

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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

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

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

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

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



support General Ledger and maintained company records and documents to meet tax guidelines.



Appendix C: Deliverable Dictionary

Table 4: Deliverable Dictionary

| Deliverable # | Deliverable Name | Deliverable Description |
|---------------|--------------------------|---|
| 01 | Commissioner Briefing | On a monthly basis, the State PMO will develop and deliver a status report to the WV DoHS BMS Leadership. The project status report will include a status of project deliverables and timeline, as well as associated project issues and risks. |
| 02 | Monthly Status Report | On a monthly basis, the State PMO will develop and deliver a status report to the DoHS PATH project Sponsor. The project status report will include a status of project deliverables and timeline, as well as associated project issues and risks. |
| 03 | Updated DoHS UAT Plan | The updated UAT Plan will continue to document the State's approach to UAT of the PATH project throughout Phase Three. The Plan will be updated collaboratively between the State, State PMO, and Vendor, and will include the approach to tracking UAT outcomes, issues, and defects. |
| 04 | IAPD | The IAPD will be developed in compliance with requirements, including, but not limited to, 45 CFR 95.610. |
| 05 | OAPD | The OAPD will be developed in compliance with requirements, including, but not limited to, 45 CFR 95.610. |
| 06 | Project Closeout Summary | The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to DoHS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed upon State operations team member. |



Appendix D: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

| Acronym/Abbreviation | Definition |
|----------------------|--|
| ACA | Affordable Care Act |
| ACF | Administration for Children and Families |
| APD | Advance Planning Document |
| BCSE | Bureau for Child Support Enforcement |
| BFA | Bureau for Family Assistance |
| BMS | Bureau for Medical Services |
| BSS | Bureau of Social Services |
| CC | Child Care |
| CFR | Code of Federal Regulations |
| CL | Commodity Line |
| CMA | Central Master Agreement |
| CMS | Centers for Medicare & Medicaid Services |
| CS | Child Support |
| CW | Child Welfare |
| DAF | Deliverable Acceptance Form |
| DDI | Design, Development, Implementation |
| DoHS | Department of Human Services |
| DW/DSS | Data Warehouse/Decision Support System |
| E&E | Eligibility and Enrollment |
| EDS | Enterprise Data Solution |
| EM | Engagement Manager |
| FA | Family Assistance |
| FACTS | Families and Children Tracking System |
| FFP | Federal Financial Participation |
| FFY | Federal Fiscal Year |
| FNS | Food and Nutrition Services |
| GPM | General Project Manager |
| HHS | Health and Human Services |



| Acronym/Abbreviation | Definition |
|----------------------|---|
| IAPD | Implementation Advance Planning Document |
| IES | Integrated Eligibility System |
| LIEAP | Low Income Energy Assistance Program |
| LPM | Lead Project Manager |
| MIS | Management Information Services |
| MITA | Medicaid Information Technology Architecture |
| OAPD | Operational Advance Planning Document |
| OCM | Organizational Change Management |
| OIG | Office of the Inspector General |
| OMB | Office of Management and Budget |
| OSA | Office of Shared Administration |
| OSCAR | Online Support Collections and Reporting |
| PATH | People's Access to Help |
| PM | Project Management |
| PMBOK® | Project Management Book of Knowledge® |
| PMI® | Project Management Institute® |
| PMO | Project Management Office |
| PMP® | Project Management Professional® |
| RACI | Responsible, Accountable, Consulted, and Informed |
| RAPIDS | Recipient Automated Payment and Information Data System |
| RFP | Request for Proposal |
| RTM | Requirements Traceability Matrix |
| SIT | System Integration Testing |
| SLA | Service-Level Agreement |
| SMC | Streamlined Modular Certification |
| SME | Subject Matter Expert |
| SNAP | Supplemental Nutrition Assistance Program |
| SOW | Scope of Work |
| SS | Support Staff |
| SSA | Social Security Administration |
| SS-A | State Self-Assessment |



| Acronym/Abbreviation | Definition |
|----------------------|---|
| State | West Virginia |
| TANF or WV WORKS | Temporary Assistance to Needy Families |
| UAT | User Acceptance Testing |
| USVI | United States Virgin Islands |
| WVCHIP | West Virginia Children's Health Insurance Program |
| WVOT | West Virginia Office of Technology |


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 



No matches found

Your search did not return any results for active records.

Would you like to include inactive records in your search results?

Search inactive

Go back

You are viewing this page over a secure connection. Click here for more information.

West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.

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 | X Close |
| At Will Term | A | M | Hi, I'm SOLO! I can help you file your Annual Report. |
| At Will Term Years | | Pa | |

**Authorized
Shares**

**Young
Entrepreneur**

Not Specified

Addresses

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

Officers

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

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

DBA

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

BERRY, DUNN, MCNEIL & PARKER,
PLLC

TRADENAME

11/5/2019

DBA Name

Description

Effective Date

Termination Date

Annual Reports

Filed For

2023

2022

2021

2020

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

Date filed

[File Your Current Year Annual Report Online Here](#)

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

Tuesday, June 4, 2024 — 2:12 PM

© 2024 State of West Virginia

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