



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: 08-16-2024

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

Order Number:	CDO 0511 2680 BMS2500000012 1	Procurement Folder:	1492001	
Document Name:	Take Me Home WV & Home & Community Based Services Quality In	Reason for Modification:		
Document Description:	Take Me Home WV & Home & Community Based Services Quality In			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way	Master Agreement Number: CMA 0511 HHR2100000003 1		
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Lakendra R Burdette Requestor Phone: 304-352-4319 Requestor Email: lakendra.burdette@wv.gov <div>2025 FILE LOCATION _____</div>
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount: \$641,925.00

Purchasing Division's File Copy

CH 9/11/24
PURCHASING DIVISION AUTHORIZATION
DATE: 9/11/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 9-12-24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Take Me Home WV & Home & Community Based Services Quality Initiative Project

Service Period: 10/15/2024-06/14/2025

Total: \$641,925.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$5,805.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-10-15	2025-06-14				

Commodity Line Description: Lead Project Manager: Optional Renewal Year One**Extended Description:**

Lead Project Manager: Optional Renewal Year One

Hourly Rate: \$215.00

27 hours @ \$215 = \$5,805.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$4,860.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-10-15	2025-06-14				

Commodity Line Description: Engagement Manager: Optional Renewal Year One**Extended Description:**

Engagement Manager: Optional Year One

Hourly Rate: \$270.00

18 hours @ \$270 = \$4,860.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$529,740.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-10-15	2025-06-14				

Commodity Line Description: General Project Manager: Optional Renewal Year One**Extended Description:**

General Project Manager: Optional Renewal Year One

Hourly Rate: \$180.00

2,943 hours @ \$180 = \$529,740.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$101,520.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-10-15	2025-06-14				

Commodity Line Description: Project Management Support Staff: Optional Renewal Year One

Extended Description:
Project Management Support Staff: Optional Renewal Year One

Hourly Rate: \$80.00
1,269 hours @ \$80 = \$101,520.00



August 14, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for the Take Me Home West Virginia and Home and Community Based Services Quality Initiative Project under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be nine months. BerryDunn agrees to a SOW start date effective October 15, 2024.

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

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

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

Best Regards,

DocuSigned by:

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

Ok


West Virginia Department of Human Services, Bureau for Medical Services

Take Me Home West Virginia and Home and Community-Based Services Quality Initiative Project

Staffing Plan and Scope of Work

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



Submitted by:

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

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

Eduardo Daranyi, MEd, PMP®, Principal
edaranyi@berrydunn.com

Submitted On:

August 14, 2024



Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS) Take Me Home West Virginia and Home and Community-Based Services Quality Initiative Project

This SOW describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) and Bureau for Medical Services (BMS), Take Me Home (TMH) West Virginia (WV), and the Home and Community-Based Services (HCBS) Quality Initiative Project. This SOW is henceforth referred to as the TMH-HCBS Quality Initiative Project. The work completed under the TMH-HCBS Quality Initiative Project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) #HHR21*03 Project Management Services contract between BerryDunn and West Virginia DoHS.

1.0 Introduction

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide to support the BMS for the TMH-HCBS Quality Initiative Project. The TMH-HCBS Quality initiative Project includes all HCBS Waivers plus the State Plan Personal Care Services, Home Health, and hospice programs. The goals of the project are to (1) develop a plan for continuous quality assurance and quality improvement for HCBS and (2) assess and develop the State's capacity to meet the reporting requirements for the five mandatory Long-Term Services and Supports (LTSS) measures of the HCBS Quality Measure Set.

1.1 Key Information

The goals of the project are supported by three objectives which define how the plan for continuous quality assurance and quality improvement will occur:

- Assess the State's readiness to collect, prepare, and report data on the five mandatory measures of the Centers for Medicare & Medicaid Services (CMS) LTSS Quality Measures Set as detailed in the April 2024 LTSS Quality Measures Technical Specifications and Resource Manual.
- Develop strategies to address any gaps identified in the State's ability to collect, prepare, and report data required for the mandatory HCBS Quality measures.
- Develop a Quality Management Plan for the State's home and community-based service delivery system that is responsive to CMS requirements and expectations.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Brian Holstein, LSW, director of Take Me Home West Virginia and Randall Hill, director of Home and Community-Based Services.



- The State project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Nicole Becnel as engagement manager, Eduardo Daranyi as lead project manager, Ethan Wiley as portfolio manager, Sarah Renner as the program manager, and Julie DuPuis as project manager.
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for nine 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 BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and leverage any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize Money Follows the Person Grant funds for this SOW. CMS has previously approved the Money Follows the Person Rebalancing Demonstration on April 1, 2011, for federal funds in the amount of \$400,000 approved in CY2023. This funding includes the Quality Management Support (HCBS Quality Measure Set Plan Development) staff positions, and Participant Survey needs. There is an additional \$400,000 in the CY 2024 budget for quality management that CMS approved by August 12, 2024. The project identifier is 1LICMS330830-01-15. The estimated cost of the services delivered under this SOW is \$641,925. Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its Money Follows the Person Rebalancing Demonstration to allocate additional funds for project management.

2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's leadership team will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon project completion and formal acceptance of the project closeout summary.</p>	<p>Nicole Becnel</p> <p>Eduardo Daranyi</p> <p>Peter Alfrey</p> <p>Emily McCoy</p> <p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>Dawn Webb</p>	57
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings 	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>Julie DuPuis</p> <p>Sophia Torborg</p> <p>Hailey Holden</p> <p>Shandia Benke</p> <p>Jordan Ramsey</p> <p>Hailey Holden</p> <p>Caitlin Cabral</p> <p>Cate Poling</p> <p>KD Dobyne</p> <p>Kourtney Kirk</p>	200



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation in an agreed-upon SharePoint location <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Schedule <p>Completion Criteria</p> <p>All parties will deem Project Execution and Control complete upon project completion and formal acceptance of the project closeout summary.</p>	Katie McDonald Megan Hamilton Emily Hendrickson	
3.0	<p>Assessment/Gap Analysis for HCBS Quality Management System Reporting</p> <p>Service Approach</p> <p>BerryDunn will provide complete the following activities:</p> <ul style="list-style-type: none"> Compare Fee-for-Service (FFS) LTSS-1 and FFS LTSS-2 to the State's current 1915(c) Waiver and State Plan Personal Care Program assessments and planning documents identifying data collection gaps Evaluate and identify gaps in the State's current capacity to collect the data required to report on FFS LTSS-6, FFS LTSS-7, and FFS LTSS-8 Prepare an inventory of location and storage process for current mandatory measures <p>Deliverable(s):</p> <ul style="list-style-type: none"> D04: Data Mapping Crosswalk FFS LTSS-1 and FFS LTSS-2 D05: Data Reporting Gap Analysis for FFS LTSS-6, FFS LTSS-7, and FFS LTSS-8 D06: Technical Specifications Document D07: Mandatory Measure Inventory <p>Completion Criteria</p> <p>All parties will deem Assessment/Gap Analysis</p>	Ethan Wiley Susan Chugha Sarah Renner Julie DuPuis Mary Stewart BreAnn Teague Ashley Pannell Cynthia Taylor AJ Mong Jonathan Watkins Janine DiLorenzo Jonathan Williams	900



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	complete upon project completion and formal acceptance of deliverables D04 – D07.		
4.0	<p>Solution Design to Assessment/Gap Analysis</p> <p><i>Service Approach</i></p> <p>BerryDunn will complete the following activities:</p> <ul style="list-style-type: none"> Review current program assessment and planning documents Establish measures and assess data reporting readiness for FFS LTSS-1, 2, 6, 7, and 8; 1915c waiver measures, personal care, hospice, home health, and private duty nursing Design a solution for data storage and reporting <p><i>Deliverable(s):</i></p> <p>D08: Quality Measure Set (QMS) Definitions and Methods</p> <p>D09: Data Storage and Reporting Strategy</p> <p>D10: Data Index Mapping Document</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Solution Design to Assessment/Gap Analysis complete upon project completion and formal acceptance of deliverables D08 – D10.</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>Julie DuPuis</p> <p>BreAnn Teague</p> <p>Mary Stewart</p> <p>Cynthia Taylor</p> <p>Ashley Pannell</p> <p>AJ Mong</p> <p>Jonathan Watkins</p> <p>Emily Hendrickson</p> <p>Alycia Minshall</p>	1,500
5.0	<p>Development of a Quality Management Plan (QMP)</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide complete the following activities:</p> <ul style="list-style-type: none"> Develop a QMP that includes TMH, HCBS, and facility-based measures and roles and responsibilities for maintaining the system Facilitate and incorporate stakeholder engagement for all quality measures and the plan <p><i>Deliverable(s):</i></p> <p>D11: Quality Management Plan</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Development of a Quality</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>Julie DuPuis</p> <p>Mary Stewart</p> <p>Cynthia Taylor</p> <p>BreAnn Teague</p> <p>Ashley Pannell</p> <p>AJ Mong</p> <p>Jonathan Watkins</p> <p>Jordan Ramsey</p> <p>Caitlin Cabral</p>	1,500



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	Management Plan complete upon project completion and formal acceptance of D11.		
6.0	<p>Project Closeout</p> <p>BerryDunn will prepare a project closeout summary that includes an inventory of all project documentation and deliverables being transferred to BMS at the project close. Additionally, the project closeout summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D12 Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.</p>	<p>Nicole Becnel</p> <p>Eduardo Daranyi</p> <p>Peter Alfrey</p> <p>Emily McCoy</p> <p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>Julie DuPuis</p> <p>Dawn Webb</p> <p>Hailey Holden</p> <p>Janine DiLorenzo</p> <p>Jonathan Williams</p> <p>Carole Ann Guay</p> <p>Megan Hamilton</p>	100
Total Hours			4,257
Total Not-To-Exceed Cost Estimate			\$641,925

3.0 Project Resources and Hours

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

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

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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Nicole Becnel	18	\$4,860.00
8	LPM	\$215	Eduardo Daranyi	27	\$5,805.00
11	GPM	\$180	Peter Alfrey	27	\$4,860.00
11	GPM	\$180	Ethan Wiley	45	\$8,100.00
11	GPM	\$180	Emily McCoy	18	\$3,240.00
11	GPM	\$180	Susan Chugha	45	\$8,100.00
11	GPM	\$180	Sarah Renner	270	\$48,600.00
11	GPM	\$180	Julie DuPuis	360	\$64,800.00
11	GPM	\$180	BreAnn Teague	450	\$81,000.00
11	GPM	\$180	Ashley Pannell	450	\$81,000.00
11	GPM	\$180	Dawn Webb	18	\$3,240.00
11	GPM	\$180	Mary Stewart	630	\$113,400.00
11	GPM	\$180	Cynthia Taylor	630	\$113,400.00
12	SS	\$80	Jonathan Watkins	450	\$36,000.00
12	SS	\$80	AJ Mong	405	\$32,400.00
12	SS	\$80	Sophie Torborg	270	\$21,600.00
12	SS	\$80	Alycia Minshall	9	\$720.00
12	SS	\$80	Caitlin Cabral	9	\$720.00
12	SS	\$80	Carole Ann Guay	9	\$720.00
12	SS	\$80	Emily Hendrickson	9	\$720.00
12	SS	\$80	Janine DiLorenzo	9	\$720.00
12	SS	\$80	Jonathan Williams	9	\$720.00
12	SS	\$80	Jordan Ramsey	9	\$720.00
12	SS	\$80	Megan Hamilton	9	\$720.00



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Cate Poling	9	\$720.00
12	SS	\$80	Hailey Holden	18	\$1,440.00
12	SS	\$80	KD Dobyne	18	\$1,440.00
12	SS	\$80	Kourtney Kirk	9	\$720.00
12	SS	\$80	Shandia Benke	9	\$720.00
12	SS	\$80	Katie McDonald	9	\$720.00
Totals				4,257	\$641,925.00



4.0 Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month #	EM	LPM	GPM	SS	Est. Hours Per Month	Est. Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	2	3	327	141	473	\$71,325
Month 2	2	3	327	141	473	\$71,325
Month 3	2	3	327	141	473	\$71,325
Month 4	2	3	327	141	473	\$71,325
Month 5	2	3	327	141	473	\$71,325
Month 6	2	3	327	141	473	\$71,325
Month 7	2	3	327	141	473	\$71,325
Month 8	2	3	327	141	473	\$71,325
Month 9	2	3	327	141	473	\$71,325
Total	18	27	2,943	1,269	4,257	\$641,925



5.0 High-Level Timeline

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

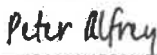
Figure 1: Proposed High-Level Timeline

Task	Month								
	1	2	3	4	5	6	7	8	9
1.0 Engagement Oversight									
2.0 Project Execution and Control									
3.0 Assessment/Gap Analysis for HCBS QMS Reporting									
4.0 Solution Design to Assessment/Gap Analysis									
5.0 Development of a QMP									
6.0 Project Closeout									



BerryDunn Authorized Signature

As a principal of this firm in our Consulting Team, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to DoHS will be for actual hours expended, which may or may not equal the projected level of effort but will not exceed the projected level of effort.

DocuSigned by:

 20A...44AB63M77...

8/14/2024

Signature

Date

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



Signature

8-15-2024

Date



Signature

8/14/2024

Date

Appendix A: Resumes

Nicole Becnel, PMP®

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

Overview

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

Experience

BerryDunn (06/2010 – present)

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

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

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

- *Provider Enrollment (2012 – 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*

WV Department of Human Services (DoHS)

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – present)*
Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.
- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*
Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*
Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 – present)*
Nicole is the Lead Project Manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System

modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

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

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

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

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

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

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

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

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

Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced

federal funding to achieve those goals.

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

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

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

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

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

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

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

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

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

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

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

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

- **Project Manager for MIHMS Provider Enrollment**

Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of

approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.

- **WV MMIS**

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all 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

Eduardo “Ed” Daranyi, MEd, PMP®

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

Overview

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

Experience
BerryDunn (09/2005 – present)

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

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

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

- *Engagement Manager (2012 – present)*

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

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

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

(08/2015 – 08/2018)

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

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

requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

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

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

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

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

process development.

WV Department of Human Services (DoHS)

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

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

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

○ *People's Access to Help (PATH) DDI Project Management (10/2017 – present)* Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise integrated eligibility system (IES), known as PATH. PATH supports the eligibility, enrollment, and administration of the Department of Human Services' (DoHS) programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables are met and risks and issues are appropriately escalated and addressed.

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

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

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

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

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

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

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The

objective of the evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

Martin's Point Health Care (2005 – 2007)

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

Goold Health Systems (1999 – 2005)

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

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

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

- **Maine DHHS (05/2001 – 01/2002)**

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

Electronic Data Systems (1985 – 1988)

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

Presentations

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

Moderator, MESC Conference sessions (2015-2019)

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

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

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 Project Management Institute (PMI) Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP) Lean Six Sigma Green Belt Certification

Overview

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

Experience
BerryDunn (03/2014 – present)

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

- **State of WV**

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

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

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

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

meetings and information sharing, and providing stakeholder management services.

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

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

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

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

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

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

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

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

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

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

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

Health Dialog (07/2006 – 11/2008)

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients,

set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.

Ethan Wiley, MPPM, PMP®, CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	<p>Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis</p> <p>Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis</p> <p>Bachelor of Arts in Political Science and History, University of Maine at Farmington</p> <p>Project Management Institute (PMI) Certified Project Management Professional (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP)</p> <p>Certified Lean Six Sigma Green Belt (LSSGB)</p>

Overview

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

Experience
BerryDunn (07/2014 – present)

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

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

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

- American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (05/2021 – present)

Serving as program manager and lead, Ethan oversees this project and provides

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

- *WV Certified Community Behavioral Health Center (CCBHC) Project (07/2021 – present)*
As portfolio Manager Ethan oversees a BerryDunn team working to create a new State Plan Amendment for WV Medicaid to implement new and expanded health and behavioral health services. Specifically, CCBHCs are a specially designated clinic that provides a comprehensive range of mental health and substance use services.
- *ARPA Section 9813: Mobile Crisis Grant Project (07/2021 – present)*
Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.
- *State Plan Review and Support (SPRS) Project (03/2020 – present)*
In order to help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (State and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training State stakeholders on the new process flow.
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 – 10/2021)*
As program manager, Ethan oversaw a team that assisted DoHS in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project was to assist the DoHS with

MITA life cycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

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

Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across the WV Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 – 12/2016; 06/2017 – 12/2017)*
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a State-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 – 02/2016)*
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 – 12/2015)*
As business analyst, Ethan was brought in to organize and complete the final development of a State Medicaid agency project to develop a major RFP to select a utilization management vendor.

WV Bureau for Children and Families

- *Project Management for Enterprise Content Management (ECM) Project (08/2015 – 02/2016)*
Ethan served as interim project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple State agencies, and facilitated a smooth implementation.

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

- *Research Studies to Cover Contingency Management (CM) Services Within the Medical Assistance Program (04/2024 to present)* Ethan is the engagement manager on this project, which is helping Minnesota in a two-phase research project to understand the feasibility, potential design, and federal authorities needed to cover CM services within the State's Medical Assistance (MA) program. The resulting product will position the State to move forward with informed policy proposals including a potential Medicaid 1115 waiver. Ethan brings his experience

with 1115 waivers provider oversight and serve as the primary point of contact with the DHS project manager.

- *Research Strategies to Enhance Access to Behavioral Health Treatment for Justice-Involved Individuals (02/2024 to present)* Ethan serves as the engagement manager on this project, which is helping Minnesota support incarcerated individuals through the transition to the community by leveraging options under a potential Section 1115 waiver. Ethan serves as the primary point of contact with the DHS project manager.
- *Program Analysis of Implementation of a PACE Program (09/2023 – 6/2024)* Ethan served as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversees the development of project deliverables, and directed project work for a team of five. In addition, Ethan served as primary point of contact with DHS for project management and provides responsibility for quality of all final project deliverables.
- **Delaware Division of Medicaid & Medical Assistance**
 - *Advance Planning Document (APD) Consulting 2029 (05/2021 – Present)*
As Engagement manager, Ethan oversees a project team focused on assisting the State of Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees project management activities, analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.
 - *APD Consulting (05/2021 – 5/2024)*
As project manager, Ethan led a team focused on helping the State of Delaware transform its Medicaid Enterprise Systems through the design and development of a variety of APDs. As part of this, Ethan oversaw all aspects of the project team including analysts, finance, and project management.
- **Maine Office of MaineCare Services (OMS)**
 - *Training and Development Services (3/2024 to Present)*
Serving as the engagement manager, Ethan oversees a team focused on training and development services for MaineCare's Senior Leadership team. The overarching project approach centers on adopting and fortifying a matrix-style team to empower team members to enhance collaboration and boost operational efficiency.
- **Rhode Island Executive Office of Health and Human Services (EOHHS)**
 - *Training and Development Services (3/2024 to 6/2024)*
Serving as the engagement manager, Ethan oversaw a team focused on training and development services for managers in EOHHS's Medicaid agency. The overarching project approach centered on further development of a matrix-style team to help optimize team strengths, foster collaboration, and drive sustained improvements in project performance.
- **Iowa Department of Human Services (DHS)**

- *Hope and Opportunity in Many Environments (HOME) Gap Analysis Project (5/2024 to Present)*

Serving as a subject matter expert, Ethan assists Iowa DHS in a community-based services redesign project intended to significantly change the current Long-Term Services and Supports (LTSS) landscape. The HOME Gap Analysis Project aims to improve Medicaid mental health and disability services as well as the existing HCBS structure.

- **Puerto Rico Department of Health (PRDoH)**

- *State Plan Support – (12/2020 – 10/2021)*

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

- **Nebraska Department of Motor Vehicles**

- *Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 – 02/2017)*

As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current State assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

- **Michigan Department of Education**

- *Early Childhood Data Governance Structure (03/2016 – 06/2016)*

As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

- **Colorado DHS**

- *Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 – 10/2014)*

Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado DHS. As part of this project, he researched and analyzed State policy and vendor solutions and supported analysis of future system costs and impacts.

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 DoHS (11/2013 – 06/2016)

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

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

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

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

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

- **Office of Behavioral and Alternative Health Care (01/2003 – 12/2004)**

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

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

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

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

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

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

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

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

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

Susan Chugha, CCP

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

Overview

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

Experience**BerryDunn (10/2015 –present)**

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

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

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

- *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 – present)*
Susan manages the current ongoing phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducts deliverable review on all documents. She performs research on SUD services, Centers for Medicare & Medicaid (CMS) requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on-time for federal submission. During this most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development, negotiation,

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

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

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

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

- *Data Improvement Project (DIP) (12/2019 – 06/2024)*

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

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

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

Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more

confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages are in compliance, compared service descriptions to federal and State guidance, and analyzed pages for overall accuracy.

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

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

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

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

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

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

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

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

- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Projects I and II (07/2021 – 11/2023)*
Serving as program manager, Susan oversaw this project and provided subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Susan participated in writing and planning assistance for the “State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services” planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Susan’s project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.
- *CCBHC SPA Project (09/2022 – 8/2023)* As program manager for the CCBHC SPA Project, Susan was responsible for oversight of the project team, assisted with project management, tracked the project budget, and monitored any risks and issues.
- *OD Services Project (05/2022 – 11/2023)*
As a business analyst (BA) on the OD project, Susan assisted with client relations, retreat planning and coordination, research, and writing assignments that helped to inform strategic planning documents, in addition to other identified deliverables per the agreed-upon SOW.
- *Provider Enrollment Application (PEA) Project (02/2017 – 11/2017)*
Susan provided project coordination assistance by maintaining all of the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV PEA process.
- *ICD-10 Transition Planning and Implementation (10/2015 – 02/2016)*
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.
- **Independent Consultant (08/2010 – 10/2014)**
Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.
- **Columbia Management (09/2012 – 10/2013)**
Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as needed ad hoc assignments.
- **Evergreen Investments (06/2004 – 05/2009)**

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

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (onboarding, sales training, negotiation skills, product training) all around the U.S. and assisted with follow-up after each program to track successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.
- **Communications Coordinator/Project Manager – Officer**
 - Created quarterly newsletters and other publications that were distributed internally.
 - Coordinated the Mutual Funds, Sales, and Operations (MFSO) program for wholesalers.
 - Managed the valued-add and continuing education curriculums that were available to field wholesalers.
 - Partnered with Learning and Development Managers to assist in coordination of training programs and onboarding for new internal and external Wholesalers.
- **Bank of America Capital Management (formerly Nations Funds) (04/2001 – 05/2004)**

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

Sarah Renner, MPH, MBA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Master of Public Health, Indiana University Master of Business Administration, University of Indianapolis Bachelor of Arts in Political Science, Hanover College

Overview

Sarah is a senior consultant in the Medicaid Practice Group. With over 20 years of state government management and consensus building experience, she has a talent for rapidly learning and mapping new and complicated information. Sarah's natural ability to listen, communicate, and collaborate, combined with her drive for results, allows her to be an invaluable asset to the states and clients that she works with. She leads and participates in improving health equity and manages sensitive and confidential information with delicacy and care.

Experience**BerryDunn (08/2022 – present)**

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

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

- *Behavioral Health Continuum of Care 1115 Waiver (08/2022 – present)*

As a policy analyst and subject matter expert (SME) Sarah works to update the substance use disorder (SUD) implementation plan, researching and developing new service definitions and writing the Serious Mental Illness (SMI) implementation plan for Phase 1. In addition, Sarah assists in the development and negotiation of a Section 1115 Demonstration Project to undertake behavioral health delivery system transformation in WV. Through this Section 1115 Waiver, WV has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD and SMI.

- *American Rescue Plan Act (ARPA) Section 9817 Home and Community-Based Setting (HCBS) Implementation Plan Project (08/2022 – present)*

Serving as project manager, Sarah oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased Federal Matching Assistance Percentage (FMAP) allowable by the ARPA allows a

wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Sarah also leads workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (08/2022 – present)*

As project manager, Sarah plans and executes the design, negotiation, and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for children and young adults enrolled in the CSEDW program. The CSEDW permits WV to provide an array of home and community-based services that support children and young adults who would otherwise require institutionalization remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children residing both in-state and out-of-state in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.

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

- *Program Analysis of Implementation of a Program of All Inclusive Care for the Elderly (PACE) Program (09/2023 – present)* Sarah currently serves as a SME for a project to help DHS analyze options for the implementation of PACE. In this role, Sarah designed an analysis of existing programs, contributes to stakeholder engagement, and assists with the development of project deliverables.

Indiana Family and Social Services Administration (FSSA) (02/2018 – 08/2022)

Sarah served as the Director of Division of Aging to co-Chair FSSA long-term services and support reform workgroup to increase the number of people living in a HCBS, supported by an integrated data environment, and focusing on caregiver training and supports. She participated in developing a Managed Long-Term Services and Supports (MLTSS) design book, responses for information (RFIs), and requests for proposals (RFPs), and expedited eligibility process and consumer engagement forums. She designed and implemented Indiana's first caregiver survey to assess caregiver awareness, supports needed, financial hardships, and health status, and also led COVID-19 response efforts for the Division which included development of the Essential Family Caregiver long-term care facility guidance, Area Agency on Aging (AAA) vaccine registration project, Homebound Hoosier Project, high-risk participant emergency planning project, Admission, Discharge, and Transfer (ADT) data sharing project between dual special needs health plans (DSNP) and AAAs, and caregiver supports awareness campaign. She oversaw the Aged and Disabled and Traumatic Brain Injury (TBI) waivers specifically focusing on rate methodology and rate setting, health care integration services, and structured family caregiving to enhance home and community-based services for older adults, persons with physical disabilities, and TBIs. She helped to ensure Indiana's State Unit on Aging follows the Older Americans Act, the HCBS Settings Rule and collaborates with the Indiana Department

of Health Long-Term Care Division while focusing on long-term care options that enhance choice, equity, and quality of life. Sarah optimized the Adult Protective Services Program (APS) by focusing on improving the case management system, reducing burdensome financial approvals, and designing collaboration opportunities for APS Units and social service programs. She also supported the Division's leadership in developing the Indiana Dementia Task Force focusing on workforce training, health care integration, and caregiver supports.

Myers and Stauffer, LC (10/2015 – 02/2018)

Sarah served as a Senior Manager in Consulting to lead internal team working on the Idaho Department of Health and Welfare (DOHW) Patient Centered Medical Home Incentive Payment Accounting System (PCMH I-PAS) which required information system, dashboard, progress measure, incentive payment, and recoupment design development. She managed project budget, invoicing, and financial reconciliation, and also led the New Jersey Department of Health (DOH) implementation of the Delivery System Reform Incentive Payment (DSRIP) program, a demonstration program designed to result in better care for individuals and populations and lower costs by transitioning payment to incentive outcome attainment. She also managed staff, budget, and contract deliverables, and oversaw Databook updating, payment generation, performance measure results reporting, learning collaborative presentations, progress report reviews, and client relationships. She participated in the New Hampshire DOHW implementation of the DSRIP Independent Assessor and Learning Collaborative projects which included designing technical assistance and training tools for Independent Delivery Networks (IDNs), developing project plan evaluation tools, evaluating project plans, and providing training and technical assistance to IDNs during the project plan development phase.

Indiana DOH (IDOH) (07/2005 – 10/2015)

- *Director for Women, Infants and Children (WIC) (02/2010 – 10/2015)*
Sarah optimized \$150 million in supplemental food and nutrition services serving 280,000 woman, infants, and children through 140 clinics and 700 grocery stores and pharmacies. She implemented policy changes balanced by cost containment and nutritional need for WIC's food package revisions for prenatal, postpartum, and breastfeeding women, infants, and children. She provided leadership to WIC's transition to a new information system that provides Electronic Benefits Transfer (EBT) instead of checks; enhanced WIC clinic staff performance optimization by developing Outreach and Business Development training targeting relationship-building with medical offices and hospitals; and developed WIC's first quarterly benchmarking system for local agencies administering WIC services. She consensus-built with clinic staff to implement the Loving Support Model to increase lactation rates and improve health status of WIC participants, and managed The Emergency Food Program (TEFAP), provided strategic and financial planning for Indiana's infant mortality media campaign, and led stakeholders through budget reductions due to sequestration and federal government shutdown.
- *Director, HIV/STD/Adult Hepatitis (09/2008 – 02/2010)*
Sarah managed \$26 million state and federal dollars to build linkages between HIV/AIDS prevention, services and surveillance with STD, Hepatitis, Tuberculosis

(TB), Immunization and Substance Use strategies. She collaborated with Indiana State Department of Health (ISDH) Laboratory to help ensure infection disease test results were transmitted to local health departments, community-based organizations, and Department of Corrections.

- *Deputy Assistant Commissioner (07/2005 – 09/2008)*

Sarah supervised and provided leadership to the following Divisions: Primary Care Office, Healthy Homes, HIV/STD/Hepatitis, Chronic Disease, Immunization, and TB. She developed and implemented operational policies and business processes for the Commission, coordinated Commission budget, legislative proposals, and performance metric projects, and served as Flood Relief Coordinator for ISDH during 2008 disaster.

Julie DuPuis, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	26 years
Certifications and Education:	Master of Public Administration with concentration in Health Care Administration, Western Michigan University Bachelor of Arts in General University Studies, Western Michigan University Fundamentals in Project Management

Overview

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

Experience
BerryDunn (06/2022 – Present)

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

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

- *Medicaid Enterprise System and Enterprise Data Solution projects (02/2022 – present)*

Julie serves the Enterprise Data Solution project as a subject matter expert supporting data profiling, testing, and requirements gathering support.

- *Medicaid & Children's Health Insurance Program System project (05/2024 to present).*

Julie serves the Medicaid & Children's Health Insurance Program System project as a subject matter expert supporting requirements gathering and research support.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, Home and Community-Based Services, Incident and Case Management System project (07/2022 – 04/2024)*

Julie serves the MES MSP project as a subject matter expert supporting requirements gathering and research support.

Michigan State University (MSU), Institute for Health Policy (IHP), Program Evaluation and Health Services Research (12/2016 – 07/2022)

Julie served as a Data Resource Analyst & Medicaid Specialist to help ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start to finish. This position supported Michigan Department of Health and Human Services programs, university researchers, and other community stakeholders. Julie cultivated collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted state staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan Department of Health and Human Services, Health Services Data warehouse. She was helpful in formulating responses to Centers for Medicare & Medicaid (CMS) questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, proposal/manuscript development with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.

Michigan Department of Health and Human Services, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (09/2012 – 12/2016)

Julie served as Section Manager for the Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section. She was responsible for making capitation payments for 1.8M Medicaid members with annual expenditures exceeding \$8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Childrens Special Health Care Services, Foster Care and MI Choice (HCBS) populations from Fee for Service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. Supervised professional staff, supporting State Plan Services, including 1915(b), 1115 waiver services, and other related health care programs, serving 1.8 million members with annual expenditures over \$6 billion. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined, and enforced standard operating procedures, interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings her team

recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members that were over 135% Federal Poverty Level (FPL). She interacted with the actuary almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

Michigan Department of Community Health Department of Community Health, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (12/1998 – 09/2012)

Julie served as a Departmental Specialist and Senior Analyst/Lead Worker. She developed professionally into a recognized resource serving as the agency expert in several substantial departmental programs. Julie assumed a pivotal role in creating, testing, and implementing the Medicaid Health Plan and other capitated program rates in the Community Health Automated Medicaid Payment System (CHAMPS). Julie developed her position as the lead, responsible in loading and maintaining Michigan's Medicaid managed care programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting, consulting on policy, research and respond to auditor findings, and train new staff. Julie was responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research and calculated preliminary and year end accrual estimates.

Developed position as the lead, responsible in loading and maintaining Michigan's Medicaid programs capitation rates, calculating managed care plan quality withholds, yearend accruals, portions of CMS-64 reporting and other federal compliance initiatives, consulting on policy, research and respond to auditor findings, and train new staff. Responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research, calculated preliminary and year end accrual estimates. Department's key data analyst of the Michigan Adult Home Help (AHH) and Freedom to Work (FTW) Programs. Instrumental in presenting information to the Governor's Long-Term Care (LTC) Task Force, other advocate groups, upper Department management on aging and care demographics, educating audiences holding down LTC costs. Assisted in forming, writing and implementing policy changes as well as responding to auditor findings. As the Data Analyst for FTW Program, she conducted studies involving demographic and expenditure information on enrollees as well as complete national annual reporting. This work led to an increase in the Medicaid Infrastructure Grant (MIG) awards from 2005, \$500,000 original award to 2010's, \$1.3 million award.

Key organizer and developer of annual budget slide presentation for the Medicaid Director to the Michigan Legislature and other outside organizations. Involved in presentations to Health Maintenance Organization (HMO) executives, Governor's Long-Term Care Task Force, advocate groups, as well as the department's upper management.

Program duties for the Medicaid HMOs involving rate setting and research. Developed position as the lead, responsible in loading and maintaining Michigan's Medicaid rates including Michigan's Comprehensive Health Plan Rates, Children Special Health Services rates, Adult Benefits Waiver, Program of All Inclusive Care for the Elderly (PACE), MICHild rates, MI Child Dental and Healthy Kids Dental rates. Responsible for performing complex analysis of claims data and eligibility data; implementation of capitation rates for the Medicaid managed care health plans, calculated preliminary and year end accrual estimates. Position expanded responsibilities in 2007 to include the start of post-payment work in terms of providing technical guidance to the HMOs involving over \$800 million in new federal matching funds.

Conferences and Presentations

Presenter at the Medicaid Enterprise Systems Conference in 2016 "4-05: Modernizing Managed Care through the Power of Data Analytics". This presentation focused on MDHHS' experience with the Encounter Data Quality Initiative that began in 2010.

BreAnn Teague, JD, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Doctor of Jurisprudence, Indiana University, William H. McKinney School of Law Bachelor of Arts, Human Services William Peace University Certified Project Management Professional (PMP®)

Overview

BreAnn is a senior consultant in BerryDunn's Medicaid Practice Group, providing Medicaid policy subject matter expertise and project management support. Her experience includes government program consultancy, collaboration with stakeholders to help ensure successful implementation of Medicaid programs and policies, legislative implementation, and project management.

Experience**BerryDunn (04/2024 – present)**

BreAnn works with state Medicaid agency clients and currently serves on the project team based in San Juan, Puerto Rico.

- **Puerto Rico (PR)**
 - Puerto Rico Medicaid Program (PRMP)**
 - *Medicaid Policy Subject Matter Expert (SME) and Point of Contact (POC) (April 2024 – present)*

BreAnn currently provides policy support to the Medicaid Policy Team and performs legislative analysis and recommendations for required legislative implementation. BreAnn also assists with Puerto Rico State Plan Amendment.

Aptive Resources, LLC (12/2021 – 03/2024)

While at Aptive, BreAnn worked as a consultant with Veterans Affairs on various healthcare projects. She provided regulatory, administrative, and project-relevant legislative consultation. She successfully assisted the Office of Healthcare Transformation with programmatic changes and pilot implementations in response to multiple Federal Final Rules. Additionally, she drafted project artifacts such as training and implementation materials, project charters, project action plans and collaborated in the development of Memoranda of Understanding (MOU) between participating federal agencies.

Indiana Family Social Services Administration, Office of Medicaid Policy and Planning (01/2019 – 12/2021)

BreAnn served in multiple roles during her tenure with Indiana's Office of Medicaid and Policy Planning.

- **Medicaid Home and Community-Based Services (HCBS) Program Director**

In her HCBS Program Director role, BreAnn helped ensure HCBS waiver documents met CMS compliance requirements and adhered to state HCBS directives. She planned waiver submission projects and was responsible for submitting 19815(c) waivers to CMS via the WMS portal.

- **Senior Manager of Program Administration**

As Senior Manager, BreAnn collaborated directly with Centers for Medicare & Medicaid Services (CMS) in the development of State Plan Amendments and HCBP Waiver programs and oversaw the team of HCBS program directors.

- **Director of Government Affairs**

While BreAnn served as Director of Government Affairs, she worked with other Medicaid section leaders to address programmatic changes that impacted areas such as eligibility, pharmacy, and prior authorization. BreAnn worked with leadership when the Public Health Emergency (PHE) was declared to help ensure emergency waivers were sent to CMS in a timely manner. She also researched additional flexibilities to benefit Indiana Medicaid recipients.

Indiana Office of Attorney General (06/2016 – 01/2019)

BreAnn worked as an investigator with the Indiana Office of Attorney general in the Consumer Protection Unit. As an investigator, she drafted the bases for administrative litigation pursuant to her findings. BreAnn also supported deputy attorneys general in legal proceedings by presenting evidence and serving as the state's witness.

Ashley Pannell, EMBA, MS

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

Overview

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

Experience

BerryDunn (04/2024 – present)

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

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

- **WV Bureau for Social Services (BSS)**

- *Child Welfare Initiatives Project (05/2024 – present)*

As a subject matter expert, Ashley provides detailed analysis of funding mechanisms available to youth, focusing on residential and community-based supports.

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

- *CSED Waiver Project (05/2024 – present)*

Ashley provides subject matter expertise on the planning, design, and implementation of a Medicaid HCBS waiver program. The CSED Waiver provides an array of community-based services that support children and young adults who would otherwise require institutionalization to remain in their homes and communities. In this role Ashley has revised policy, developed training tools for provider development and provided input and guidance on best practices.

- *Justice Involved Program Support Project (07/2024 – present)*

Ashley provides program support that assists BMS with the increasing needs for policy integration related to members who are being released from carceral settings. In this role Ashley analyzes program eligibility, efficiency, health outcomes and develops strategies for process improvement.

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

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

DBHDS and DMAS work directly together to manage and implement Virginia's Medicaid programs. DMAS is primarily responsible for the financing and overall administration of Medicaid services, including policy development and regulatory oversight. DBHDS operates these Medicaid programs, with emphasis on service authorizations, provider development, cost allocation, case management and eligibility to ensure the delivery of behavioral health and developmental services.

Ashley's work was directly with DMAS, and here are some key highlights:

- Worked directly with DMAS on eligibility, enrollment, provider claims, and customized rate analysis, engaging in technical deep dives to ensure accurate and efficient processing and policy interpretation.
- Worked directly with DMAS in creating policy and guidance tools for stakeholders regarding service provision of Medicaid waiver services, in adherence to the Department of Justice (DOJ) Settlement Agreement and

HBCS.

- Worked directly with DMAS on the Supports Intensity Scale (SIS) project with the Human Services Research Institute to reform the SIS assessment tool, which includes analyzing data on service utilization and costs to improve resource allocation and tier structures.
- Working directly with DMAS, conducted compliance reviews of HCBS providers and CSBs via documentation and on-site visits, advising and collaborating with senior leadership on statewide policy development, implementation, and monitoring.

Service Authorization and Policy: DBHDS handles service authorizations for Medicaid-funded services, working under the guidance and contractual obligations set by DMAS. The two agencies jointly develop and update waiver manuals and policies to ensure compliance with state and federal regulations.

Program Operations and Compliance: DBHDS operates the Medicaid waivers, ensuring that services meet the required standards. This involves frequent collaboration with DMAS on technical aspects, such as eligibility, enrollment, provider claims, and rate settings.

Data Analysis and Trend Monitoring: DBHDS conducts trend analysis and uses the insights to develop guidance and compliance strategies in conjunction with DMAS. This collaboration helps optimize service delivery and financial management.

Guillory Health (07/2015 – 01/2017)

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

Fairfax County Government 05/2011 – 05/2015)

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

reimbursement in 55 weeks and increased stakeholder satisfaction.

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

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

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

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

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

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

Overview

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

Experience
BerryDunn (08/2017 – present)

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

- **State of West Virginia (WV)**
 - WV Bureau for Medical Services (BMS)**
 - Client & Engagement Operations Program Manager (01/2024 – present)
As client and engagement operations manager, Dawn provides engagement support in process improvement, best practices, staffing allocations, and project managers for the WV Engagement. Dawn also provides project oversight for the following projects: *Payment Error Rate Measurement (PERM) (05/2018 – present)*
 - *APD Consulting Services (05/2023 – present)*
 - *Partnership Management Support (December 2023 – present)*
 - *Quality Improvement Initiatives Portfolio Manager (05/2019 – 01/2024)*

As quality improvement initiatives portfolio manager, Dawn provides project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, PERM), and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)*
- *Data Improvement Project (09/2019 – present)*
- *Public Health Emergency (PHE) Support (12/2021 – present)*
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)*
- *Provider Management Support (11/2019 – present)*
- *State Plan Review and Support (SPRS) (02/2020 – present)*
- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)*
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)*
- *Partnership Management Support (December 2023 – present)*
Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.
- *APD Consulting Services (05/2023 – present)*
Dawn currently manages the BerryDunn team for the WV Engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as needed updates to 10 established APDs.
- *PERM Project (05/2018 – present)*
Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.
- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*
Dawn served first as project subject matter expert (SME) before beginning her

tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.

- *TPL Procurement (05/2019 – 03/2022)*

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

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

- *Recovery Audit Contractor (RAC) (09/2023 – present)*

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

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

- *Project Management and APD Support (10/2022 – present)*

Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.

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

- *Medicaid Organizational and Business Process Redesign (11/2021 – 06/2022)*

Dawn supported the MDQ in PERM corrective action planning and response.

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

- *National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)*

Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

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

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

leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 – 11/2009)

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

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

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

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

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

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

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

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

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

Acordia National (12/1994 – 05/1996)

Dawn began her career as a medical claim examiner.

Mary Stewart, MS

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

Overview

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

Experience**BerryDunn (10/2022 – present)**

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

WV Bureau for Medical Services

- *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (01/2023 – present)*
Mary serves as the Project Manager to procure a new modernized MMIS platform. She oversees all aspects of the project pertaining to soliciting a new vendor through a Request for Proposal (RFP) process.
- *Programmatic Managed Care Support, (06/2024 - present)*
Mary supports the department with policy research, development, quality, reporting, and curriculum development.
- *Mountain Health Trust Procurement Assistance Project (01/2023 – 06/2024)*
Mary serves as a managed care Subject Matter Expert (SME) on the WV Mountain Health Trust (MHT) re-procurement project. She researched other state methods regarding contract oversight.
- *MES MSP Project, Home and Community Based Services, Incident and Case Management System (ICMS) project (05/2023 – 04/2024)*
Mary served the MES MSP project as a SME supporting research support, specifically on the ICMS forms and reports analysis.

WV Department of Human Services (DoHS)

- *People's access to Health Project (11/2023-1/2024)*
As a subject matter expert, Mary was charged with prioritizing change requests for the Child Support module, based on the state determining

level of severity.

- **State of Alaska – Department of Human Services**

- *Alaska Fiscal Agent Project (10/2022 – present)*

- As a subject matter expert, Mary reviews monthly service level agreements (SLAs) to help ensure the vendor is compliant with the contract. In addition, she reviews the monthly vendor invoice for accuracy.

Rose International (10/2021 – 1/2023)

Mary served as a Business Analyst for the State of New Mexico to assist with the implementation of the Electronic Visit Verification (EVV) system for the Self-Directed Community Based (SDCB) population. She edited Business Requirement Documents, wrote change requests, and confirmed their completion, and attended Change Request Requirement Sessions. She also reviewed all training materials and attended training courses to help ensure end-users understood the new system. Mary provided feedback to leadership on ways to streamline current processes. She collaborated with the Provider Management team on streamlining current database processes and reviewed Managed Care Organization (MCO) contracts for compliance with the 21st Century Cures Act.

State of Iowa Medicaid Enterprise (10/2019 – 09/2021)

Mary served as Managed Care Oversight and Support Bureau Chief to lead a \$5+ billion Managed Care and Dental Wellness Program with the mission to improve member health outcomes, improve program efficiency and help ensure program sustainability. She supervised 12 direct hires primarily responsible for contract compliance oversight, remediation of compliance and performance issues, managed care oversight, actuarial rate setting, quality improvement, encounter data submission accuracy, and data analytics. Mary led strategic planning related to regulatory implementation, onboarding of new programs and services, alignment of best practices, and continuous program and process improvement. She also collaborated with internal and external entities on aspects tied to fiscal oversight, actuarial rate development, and information technology systems. Mary provided relevant feedback on modernization for the current MMIS system including collaboration with multiple stakeholders on the creation of user stories relevant to the Iowa Medicaid program.

Centene Corporation, Iowa Total Care (12/2018 – 10/2019)

Mary served as a Claims Management Manager with 16 direct hires responsible for the daily operations of accurate claims processing. She worked with Provider Relations Contracting Department to help ensure contract requirements aligned with the claims system, assisted Operations Director with the encounter/eligibility file transfer process, and identified and implemented operational efficiencies, process improvements and developed policies and procedures. Mary also analyzed provider/member impacts and responded to complex escalated claims processing issues to help ensure that provider/member expectations were met.

Conifer Health Solutions (02/2018 – 12/2018)

Mary served as a Claims Denial Prevention Analyst to provide solutions to hospital departments on eliminating/reducing denials; analytics on all department denials; and coordinated resources to meet department specific needs.

Kansas Department of Health & Environment (01/2002 – 02/2018)

- *Data Analytics/Business Analyst Manager, Division of Health Care Finance (05/2014 – 02/2018)*

Mary managed a team of eight healthcare data analysts responsible for all reporting requirements. She managed and delivered all legislative and internal/external policy fiscal impacts. She defined data reporting needs for the implementation of the modernized eligibility system, collaborated with the operations team on validation and accuracy of the HIPAA 837, 834 and 820 transaction files with the MCO, and utilized Agile-Waterfall Hybrid Methodology for the Modernization of the Kansas Medicaid Management System (KMMS) – Data Warehouse module. She led requirement verification sessions, gathered business requirements, and wrote Business Requirement Documents for the Medicaid Modernization project. Mary also created, performed, and audited all UAT for the implementation of the MMIS modernized Data Warehouse.

- *Fiscal Analyst/Business Analyst Manager, Division of Health Care Finance (10/2002 – 5/2014)*

Mary was responsible for requests and statistical measures of Medicare/Medicaid data through the application of quantitative and qualitative analyses. She updated all monthly/quarterly expenditure reports for Centers for Medicare and Medicaid Services (CMS); provided Kansas legislature and health professionals with monthly trend reports. Developed and set policy for agency medical programs and was instrumental in implementing IBM-Watson Health reporting tool-Advantage Suite.

- *Business Analyst/Lead Researcher, Bureau of Remediation (01/2002 – 10/2002)*

Mary serviced and tracked loans for the revolving Federal loan fund program. She also redesigned and maintained the Bureau's website and worked with a team of colleagues to create an on-line web-based grant writing application.

Cynthia Taylor

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	45+ years
Certifications and Education:	Licensed Practical Nurse, Trenholm State Technical College Alabama Board of Nursing License Certification in Healthcare Privacy Certification in Healthcare Security

Overview

Cynthia is a consultant specializing in healthcare compliance, Medicaid, and Health Insurance Portability and Accountability (HIPAA) privacy and security. A retired Licensed Practical Nurse (LPN) and former Medical Practice Manager, Cynthia has more than 45 years of medical and healthcare compliance experience, including experience in claims analysis and submission, medical records review, medical records management, physician and patient scheduling, purchasing, budgeting, audits, policy development, training, and personnel management.

Experience

BerryDunn (12/2012 – present)

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

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

- *Medicaid Enterprise Data Solution (EDS) Procurement Assistance, Implementation, and the Centers for Medicare and Medicaid Services (CMS) Certification Project (09/2018 – present)*

As BA and subject matter expert (SME), Cynthia assists BMS with management of the scope of EDS requirements throughout the requirements' design, development, and implementation, testing, and training. Cynthia previously supported the Data Visioning & Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development for the Procurement Assistance Project.

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

- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) (08/2012 – present)*
 - *West Virginia Children's Health Insurance Program (WVCHIP) (09/2020 – 03/2021)*

As a BA, Cynthia assisted WVCHIP with transitioning from fee for service delivery

to Managed Care model. Cynthia assisted in the operational and system readiness reviews and the development of the Operational and Monitoring Plan.

- *ICD-10 Implementation (03/2013 – 04/2016)*
Cynthia worked on the ICD-10 Implementation Project and provided support to the Project Manager as a SME on healthcare policy. She assisted in the remediation of the BMS Provider Policy Manual for ICD-10 Implementation, facilitated Policy Workgroup Sessions with program areas, and assisted in coding analysis and generating configuration spreadsheets for needed changes in the Medicaid Management Information System (MMIS).
- *Adult Quality Measures Grant Project (03/2013 – 10/2016)*
Cynthia supported the collection and reporting of the Adult Core Quality Measures and the implementation of the BMS Quality Unit. She assisted with the development of training materials, coordinated training workshops, provided training to staff and to providers, served as a resource for providers, stakeholders, and partners requesting assistance, and provided expertise in the development of trainings that focused on educating providers in collecting and reporting on the Adult Core Measures. She aided in development of staff training that included the use of tools for collecting and analyzing the data from claims, surveys, medical records, and encounter records and worked with the Data Manager and Data Analyst to help ensure best practices related to data collection and analysis.
- *Affordable Care Act (ACA) Project (12/2012 – 08/2013)*
Cynthia functioned as a consultant and participated in writing impact assessments of the ACA Provisions on WV Medicaid, including Policy and Procedure Impacts, System Impacts, MITA Business Process Impacts, and Weekly What's New on ACA.
- **Puerto Rico Medicaid Program (PRMP)**
 - *Puerto Rico MMIS Enterprise Objective Monitoring and Control Services (08/2020 – 09/2021)*
Cynthia served as a SME to assist the Puerto Rico Department of Health (PRDoH) with development of an RFP for the PRMP Medicaid Enterprise Solution (MES) MMIS Financial Management Solution module. She assisted with the development of contract requirements, soliciting responses, detailing response requirements, and the outlining of PRMP's process for evaluating responses and selecting a vendor.

Alabama Medicaid Agency (07/2002 – 12/2011)

As a Senior Healthcare Compliance Consultant for a consulting firm, Cynthia worked on the following projects for the Alabama Medicaid Agency:

- *MMIS Coordinator's Office (06/2006 – 12/2011)*
Cynthia provided business analysis and project support for the MMIS implementation and certification. She assisted with the development of an Advance Planning Document (APD) and Invitation to Bid (ITB) for the Fiscal Agent (FA) re-procurement, which included writing system requirements and enhancements for a Recipient Web Portal,

Provider Web Portal for enrollment and re-enrollment, National Correct Coding Initiative (NCCI) edits, and 5010 compliance. Additionally, she assisted with the development of an APD for NCCI and ICD-10.

- *Independent Verification & Validation (IV&V) and Technical Assistance of the FA MMIS Implementation (04/2006 – 10/2008)*

Cynthia provided project management support; monitored and tracked correspondence between the Agency, FA, and IV&V vendor; reviewed and compiled Agency responses prior to submission to FA (including deliverables, subsystem user manuals, test case reviews, test case modifications, test case cancellations, and test case result approvals); assisted the Project Manager in compiling weekly, monthly, and quarterly IV&V status reports; performed quality assurance on IV&V deliverables; and monitored the Agency and FA delivery schedule.

- *Managed Care External Quality Review (EQR) (06/2006 – 05/2011)*

Cynthia served as Project Lead for the EQR of the Maternity Care Program and Partnership Hospital Program (PHP). Her responsibilities included scheduling, conducting, and documenting assessments of the primary contractors; generating reports to CMS; and providing recommendations to the Agency to help ensure compliance with the Managed Care federal regulations.

- *HIPAA Security Implementation (07/2004 – 12/2004)*

Cynthia scheduled Privacy/Security Advisory Group (PSAG) meetings; scheduled, conducted, and documented security risk assessments; produced and distributed HIPAA Security Manuals to Senior Management; produced and distributed the Security Officer's Manual to the Security Officer; and assisted Agency General Counsel in execution of HIPAA Security Business Associate Agreements.

- *HIPAA Privacy Implementation (07/2002 – 06/2004)*

Cynthia worked with the Agency's Privacy Officer to meet HIPAA privacy compliance requirements by the April 2003 deadline. Key tasks included facilitating advisory group meetings to review HIPAA privacy policies and procedures; monitoring updates to the Privacy Rule; distributing Agency Notice of Privacy Practices; developing Agency privacy policies, procedures, and forms; developing training materials; facilitating privacy training; conducting work area assessments; and assisting the Agency General Counsel in executing HIPAA Privacy Business Associate Agreements.

Baptist Health System (2002)

As the Senior Healthcare Data Analyst, Cynthia was responsible for maintaining the database used for timely submissions to Joint Commission on Accreditation of Healthcare Organizations (JCAHO) for the four hospitals that were part of the Baptist Health System.

Children's Health System (1981 – 2000)

As the Medical Practice Manager for Children's Health System (formerly Physicians to Children/Central Alabama Children's Specialists), Cynthia worked closely with nursing and medical staff, including preparation and execution of regulatory guidelines and documentation required for Clinical Laboratory Improvement Amendments (CLIA), Occupational Safety and Health Administration (OSHA), and the JCAHO accreditations and certifications.

LPN (1977 – 1981)

Cynthia began her career as an LPN for Jackson Hospital and Clinic, and later for James R. Beshear, MD at his practices.

Jonathan Watkins

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

Overview

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

Experience**BerryDunn (10/2021 – present)**

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

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

- *Mountain Health Promise (MHP) Re-Procurement Project (11/2021 – 11/2022)*

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of Managed Care Organization (MCO) procurement activities for MHP. Jon's work helped to ensure the State had a comprehensive Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

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

- *WV Certified Community Behavioral Health Clinic (CCBHC) (11/2023 – 12/2023)*

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV CCBHC Project when needed. Jon's work helped to keep the client informed and helped ensure the project meets its goals and objectives.

- *WV People's Access to Help (PATH) (11/2023 – 2/2024)*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the WV PATH Project when needed.

Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

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

- *Mountain Health Trust (MHT) Re-Procurement Project (03/2022 – 07/2023; 11/2023 – 06/2024)*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of MCO procurement activities for MHT. Jon's work will help to ensure the State has a comprehensive RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

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

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MES MSP Project. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

- *WV Mental Health Parity Project (01/2022 – 02/2023)*

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the BMS and WVCHIP Mental Health Parity and Behavioral Health Support Project. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

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

Jon worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing, and customer service. In addition, he organized the day-to-day needs of the unit and performed basic bookkeeping duties.

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

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

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

Jon worked as a dispatcher to receive and dispatch all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.

AJ Mong, MEd

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

Overview

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

Experience

BerryDunn (07/2022 – present)

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

WV Department of Human Services (DoHS)

- *Mountain Health Promise (MHP) Re-procurement project (07/2022 – 06/2024)*
AJ serves the MHT Re-procurement project providing business analysis and project coordination support.
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2022 – present)*
AJ serves the MES procurement project providing business analysis and project coordination support.
- *Incident and Case Management (ICMS) Procurement project (08/2022 – 3/2024)*
AJ served the ICMS procurement project by providing business analysis and project coordination support.
- *Mountain Health Trust (MHT) Re-procurement project (09/2022 – 10/2023)*
AJ served the MHT Re-procurement project providing business analysis and project coordination support.

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

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

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

AJ served as an Elementary School Counselor with the School Leadership Team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that would lead to measurable system-wide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

Elizabethtown Area School District (12/2012 – 06/2013)

AJ served as Long-Term Substitute for an Elementary School Counselor to provide individual & small group counseling, conducted gifted academic screening, and partnered with other counselors to implement a holiday giving program to provide families with meals during the holiday seasons.

Union School District (02/2012 – 05/2012)

AJ served as a Long-Term Substitute for an Elementary School Counselor to conduct classroom guidance lessons and facilitated a peer partnership program for elementary students.

Hershey Entertainment Complex (05/2005 – 08/2013)

AJ served as Supervisor to lead over 200 employees, including other supervisors, to help operate and maintain the daily procedures and staffing for over a dozen facilities in the Hershey Park Food and Beverage Department. He provided staff training and evaluation, maintained daily inventory and ordering, and tracked labor to help offset cost deficits. AJ also developed individual inspection manuals for all locations, addressed customer service issues and complaints, and resolved them in a manner consistent with the company's values.

Sophia “Sophie” Torborg, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Master of Public Health Administration and Policy, University of Minnesota Twin Cities Bachelor of Science Applied Economics, University of Minnesota Twin Cities

Overview

Sophie is a creative and diligent Medicaid consultant with BerryDunn. Sophie has experience with Medicaid policy analysis work as well as procurement projects. Her diverse healthcare related experience and public health education informs her current work. Sophie has worked as an administrative professional in long-term care settings, and as a communications assistant. From these experiences, she has gained attention to detail, understanding of Medicaid policy, and technical writing capabilities that strengthen her project management skills.

Experience**BerryDunn (07/2023 – present)**

Sophie works as a Medicaid Staff Consultant using research, writing, and administrative capabilities to assist numerous Medicaid related projects focused on West Virginia, Puerto Rico, and Minnesota. Her main experience includes waiver, state plan amendment (SPA), legislative report, and procurement material development.

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

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

- *Children with Serious Emotional Disorders Waiver (CSEDW) project (07/2023 – present)*
Sophie provides research and technical assistance support to the CSEDW project including updates to the policy manual, Chapter 502, for the CSEDW program.
 - *State Plan Review and Support Project (07/2022 – present)*
Sophie has supported SPA development and the subproject of the school-based health services (SBHS) grant.
 - *Certified Community Behavioral Health Clinics (CCBHC) project (08/2023 – present)*
Sophie supports the administration of the CCBHC project through project coordination tasks including note taking and meeting scheduling.
 - *American Rescue Plan Act (ARPA) project (08/2023 – present)*
Sophie assists with the monthly ARPA report for the State of West

Virginia to the Centers for Medicare & Medicaid Services (CMS).

- **State of Minnesota (MN)**

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

- *Program of All-Inclusive Care for the Elderly (PACE) Implementation Plan project (09/2023 – 06/2024)*

Sophie assisted with the drafting, research, and stakeholder engagement regarding an implementation plan for the State of Minnesota regarding PACE.

- *1115 Waiver for Justice-Involved Individuals project (02/2024 – present)*

Sophie supported the research, development, and writing of a concept paper for the future Minnesota application for the Section 1115 Reentry Demonstration opportunity.

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

- *Outcomes Based Procurement Project Support (07/2023 – 03/2024)*

As a consultant, Sophie provided support with finalizing the request for proposal for PRMP's eligibility and enrollment (E&E) system.

- *Enterprise Data Warehouse (EDW) Project Support (07/2023 – 03/2024)*

As a consultant, Sophie provided support to the EDW project and writing assistance for the roadmap deliverable.

Institute for Cancer Research Prevention (10/2021 – 05/2023)

As an administrative assistant, Sophia prepared communications materials, including newsletters, research findings, and cancer prevention education. She utilized interviewing, survey administration, and video skills to create researcher profiles for oncology leaders.

Catholic Eldercare (08/2022 – 03/2023)

Sophia worked as an administrative student intern and spearheaded quality improvement projects including a comprehensive facility assessment for the organization, an updated employee handbook, an all-staff survey regarding benefits, and a dining improvement plan. She engaged in long-term care advocacy by meeting with state representatives and developed survey corrections for legal nursing home compliance.

BerryDunn (05/2022 – 08/2022)

As an intern with the Medicaid Practice Group, Sophia developed a request for proposal (RFP) for the Puerto Rico Medicaid Program's printing and mailing service. She also completed preliminary policy research for the Puerto Rico Medicaid Program.

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

- *Outcomes Based Procurement Project Support (06/2022 – 08/2022)*

As a consultant, Sophie provided support with finalizing the RFP for PRMP's printing and mailing system.

Public Health Review: University of Minnesota (10/2021 – 01/2023)

Sophia worked as the podcase editor and produced nine podcasts focused on public health.

She also crafted the interview questions for the three top interviews of the season.

International Working Group for health Systems Strengthening (07/2021 – 12/2021)

As a research assistant, Sophia worked with global colleagues to research vaccine equity and international vaccination trends. She also coordinated key meetings with leaders from the University of Brussels, Women in Global Health, and the Development Bank of Latin America.

New Perspectives Senior Living (04/2021 – 11/2021)

Sophia served as a senior caretaker by assisting with activities of daily living (ADLs) to help residents achieve the highest practical physical, mental, and psych-social well-being. She also communicated physical and emotional observations of residents to health practitioners to facilitate care plans.

Alycia Minshall, MA

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

Overview

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

Experience

BerryDunn (8/2022 – present)

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

Alycia Minshall Editing Services (3/2014 – present)

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

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

- **Senior Editor (6/2020 – 8/2021)**

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

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

- **Editor (4/2017 – 6/2020)**

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

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

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

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

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

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

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

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

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

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

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

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

Caitlin Cabral

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

Overview

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

Experience**BerryDunn (09/2021 – present)**

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

QualityMetric (08/2020 – 09/2021)

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

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

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

True Colors, Inc. (01/2019 – 05/2019)

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

redesigned presentation materials to best represent True Colors' current mission and achievements.

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

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

Carole Ann Guay

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

Overview

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

Experience
BerryDunn (10/2014 – present)

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

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 – 07/2017)*
Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Puerto Rico**
 - *Enterprise Objective Monitoring and Control (09/2023 – present)*
Carole Ann assists with review and updates of deliverables.
- **Ellis County, TX**
 - *Computer-Aided Dispatch and Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 – present)*
Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.
- **City of Saint Charles, MO**
 - *Enterprise Resource Planning (ERP) System Selection Project (09/13/2023 – 10/06/2023)*
Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN**
 - *Information Security Program Development (05/2016 – present)*
Carole Ann worked as a project coordinator for Metro's development of their

Information Security Management Program, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

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

Webber Energy Fuels (2004 – 2014)

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

Emily Hendrickson

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

Overview

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

Experience**BerryDunn (07/2017 – present)**

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

Christianbook (06/2021 – present)

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

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

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

fact-check quoted material.

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

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

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

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

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

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

Civil Consultants (09/1999 – 07/2014)

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

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

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

Janine DiLorenzo

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

Overview

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

Experience**BerryDunn (01/2022 – present)**

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

Breakwater School (08/2019 – 08/2021)

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

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

- Program Coordinator (06/2014 – 06/2018)**

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

appeals to secure public and private funding.

- **AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 – 08/2013)**
Janine coordinated communications and logistics among five committees in a cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and 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 “Jon” Williams

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

Overview

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

Experience**BerryDunn (02/2019 – present)**

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

Freelance Proofreader and Copyeditor (11/2010 – present)

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

Midwest Tape (11/2004 – present)

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

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

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

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

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

Jordan Ramsey, MA, LSSGB

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

Overview

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

Experience**BerryDunn (07/2019 – present)**

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

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

Portland Adult Education (2019)

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

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

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

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

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

The Southern Illinoian (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

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

- **Hardin County, IL**

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

- **NOVA Group of Japan**

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

Megan Hamilton, MA

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

Overview

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

Experience**BerryDunn (12/2022 – present)**

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

Fiverr (05/2022 – 12/2022)

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

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

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

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

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

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

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

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

Megan served as a tutor and as Program Assistant to facilitate team meetings, assist with new

tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.

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

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

Cate Poling

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

Overview

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

Experience

BerryDunn (06/2021 – present)

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

- **State of WV**

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

- *Data Improvement Project Phase 4 (06/2023 – present)*
As a project manager, Cate assists with refining, expanding, and initiating the DIP systems development lifecycle (SDLC) body of work and preparing for the transfer of the work to the SDLC Coordination Project. This includes organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitates meetings between BerryDunn, State, and vendor(s) to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate also assists with WV engagement hours and resource planning oversight within this role.
- *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (06/2023 – present)*
As a project consultant, Cate assists in contributing and refining system architecture design requirements content to support the State in defining system requirements and desired outcomes for MCES module procurement(s), including specifications related to interactions with the data integration hub and systems privacy and security compliance.
- *Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 – 10/2023)*
As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project timeframe and documentation needs.

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

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 – present)*
As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address security-related items and workflows per Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC) guidance.
- *Eligibility and Enrollment Implementation Assistance –People's Access to*

Help (PATH) (06/2021 – present)

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

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

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

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

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

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

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

Cate was an associate providing remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries in person and via telephone

and followed proper procedure for handling claims. Cate was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly labeled and priced and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.

Highmark WV BCBS (10/2012 – 07/2014)

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

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

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

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

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

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

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

Hailey Holden

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

Overview

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

Experience

BerryDunn (07/2022 – present)

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

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

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

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

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

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

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

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

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

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.

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.

Kourtney Kirk

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

Overview

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

Experience

BerryDunn (10/2022 – present)

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

WV Department of Health and Human Services (DoHS)

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

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

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

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

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

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

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

TEKSystems (08/2020 – 01/2022)

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

WV Department of Health and Human Services (DoHS)

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

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

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

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

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

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

Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new

support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and also managed client relationships.

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

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

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

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

Shandia Benke, ECBA™

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

Overview

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

Experience
BerryDunn (04/2018 – present)

- **State of West Virginia (WV) Department of Human Services (DoHS)**
 - *WV Engagement (WVE) PMO Mountain Health Trust (MHT) Phase II Project (2/2024-present)*
 - *WVE PMO People's Access to Help (PATH) Project (05/2023 – present)*
Shandia provides coordination and analytical support to the MHT and PATH projects through capturing detailed notes, editing and reviewing project documentation, and contributing insightful processes and business analysis. Additionally, Shandia focuses on promoting efficiency through identifying gaps in internal processes and taking opportunities to provide process improvements.
- **Missouri Department of Social Services (DSS)**
 - *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 – present)*
 - *MME PMO Program Integrity (02/2019 – 01/2021)*
 - *MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 – 02/2019)*

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

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

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

United Landscape Design (2017)

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

Lighthouse Preparatory Academy (2015 – 2017)

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

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 – 2016)*

As a teacher, Shandia taught a range of subjects, including 6th Grade Grammar and Composition; 7th Grade Literature; Life Fitness; High School Psychology; Keyboarding; and Introduction to Computers.

- *Dean (2012 – 2015)*

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

Hentges Tree Service (2013 – 2015)

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

Wells Fargo Home Mortgage (2012)

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

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

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

WV Bureau for Medical Services (BMS)

- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance Annual Update Assistance Project (07/2023 – present)*
Katie assists with MITA lifecycle maintenance activities, including developing new business process improvement flows and updating MITA related reports.
- *Provider Enrollment (PEA) Project and Provider Management Support (08/2023 – 10/2023)*
Katie provided project coordinator assistance with planning, developing, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *Advance Planning Document (APD) Consulting Project (05/2023 – present)*
Katie provides project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.
- *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*
Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ, now in its fourth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

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

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

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Project update for project team accomplishments
02	Monthly Status Report	Monthly status update
03	Project Schedule	Schedule for the Project
04	Data Mapping Crosswalk FFS LTSS-1 and FFS LTSS-2	A document that compares LTSS-1 and FFS LTSS-2 to the state's current 1915(c) Waiver and State Plan Personal Care Program assessments and planning documents identifying data collection gaps.
05	Data Reporting Gap Analysis for FFS LTSS-6, FFS LTSS-7, and FFS LTSS-8	Evaluate and identify any gaps in the state's current capacity to collect the data required to report on FFS LTSS-6, FFS LTSS-7, and FFS LTSS-8.
06	Technical Specifications Document	Prepare a document providing the technical specifications for the measures above.
07	Mandatory Measure Inventory	Create a document that reports an inventory of where data for mandatory measures are currently being stored
08	Quality Measure Set (QMS) Definitions and Methods	Review current program assessment and planning documents and create a document providing quality definitions and methods
09	Data Storage and Reporting Strategy	Design a solution for data storage and reporting
10	Data Index Mapping Document	Create a document for Data index mapping
11	Quality Management Plan	Create a document with a Quality Management Plan that includes TMH, HCBS, State Plan Personal Care Services, Home Health, and Hospice. Document will also include facility-based measures and roles and responsibilities for maintaining the system.
12	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
BMS	Bureau for Medical Services
CL	Commodity Lines
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
FFS	Fee for Service
GPM	General Project Manager
HCBS	Home and Community-Based Services
LPM	Lead Project Manager
LTSS	Long-Term Services and Supports
QMP	Quality Management Plan
QMS	Quality Management System
QMS	Quality Measure Set
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
State	West Virginia
TMH	Take Me Home
USVI	United States Virgin Islands
WV	West Virginia



STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.
Cabinet Secretary

Cynthia Beane
Commissioner

DATE: August 14, 2024

TO: Crystal Hustead
Senior Buyer
State of West Virginia Purchasing Division

FROM: Althea Greenhowe *Althea Greenhowe*
Procurement Specialist, Senior
Office of Shared Administration/Purchasing

RE: PF 1492001, CDO BMS25*12
Dept 0511

The West Virginia Bureau for Medical Services (BMS) respectfully requests the approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker LLC under PF785940, CMA HHR21*03.

These services are to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for Take Me Home WV & Home & Community Based Services Quality Initiative Project. The service period 10/15/2024-06/14/2025. The total estimated cost is \$641,925.00.

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-3924 or althea.m.greenhowe@wv.gov. Thank you for your time and consideration in this matter.





STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.
Cabinet Secretary

Cynthia Beane
Commissioner

DATE: August 14, 2024
TO: Office of Shared Administration/Finance
FROM: Lakendra Burdette *LB*
Procurement Specialist
RE: PF 1492001, CDO BMS 25*12
0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for service period 10/15/2024-04/30/2024 in SFY 25 and service period 05/01/2025-06/14/2025 in SFY 26.

Contract extended service period: 10/15/2024 – 06/14/2025. Funding allocation table below:

CDO BMS25*12

Take Me Home WV &
Home & Community
Based Services Quality
Initiative Project

10/15/2024-04/30/2025

05/01/2025-06/14/2025

2637

2637

PR05-2025

Payment

PR07 - 2026

Payment

Lead Project Manager:

Lead Project Manager:

21 hours @ \$215

\$4,515.00

06 hours @ \$215

\$1,290.00

Engagement Manager:

14 hours @ \$270

\$3,780.00

Engagement Manager: 4

hours @ \$270

\$1,080.00



General Project		General Project	
Manager: 2,289 hours @		Manager: 654 hours @	
\$180	\$412,020.00	\$180	\$117,720.00
Support Staff: 987 hours		Support Staff: 282 hours	
@ \$80	\$78,960.00	@ \$80	\$22,560.00
	\$499,275.00		\$142,650.00
		Grand Total:	\$641,925.00

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4319 or lakendra.burdette@wv.gov. Thank you for your time and consideration in this matter.



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

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West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information			
Business Purpose	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies		Capital Stock
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years	Par Value		
Authorized Shares	Young Entrepreneur	Not Specified	

Addresses

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

Officers

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

DBA

DBA Name	Description	Effective Date	Termination 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	
2024	
2023	
2022	
2021	
2020	
2019	
2018	
2017	
2016	
2015	
2014	
2013	
2012	
2011	
2010	
2009	
Date filed	

For more information, please contact the Secretary of State's Office at 304-558-8000.

Wednesday, August 14, 2024 — 4:05 PM

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