BerryDunn

Puerto Rico Medicaid Program

RFP #: 2023-PRMP-MES-EOMC-004

Enterprise Objective Monitoring and Control (EOMC) Vendor

BerryDunn
250 Avenida Luis Muñoz Rivera,
Suite 1118
San Juan, PR 00918

Zachary J. Rioux, Principal
zrioux@berrydunn.com

William A. Richardson, Principal
brichardson@berrydunn.com

Charles K. Leadbetter, Principal
cleadbetter@berrydunn.com

Proposal Submitted On:
October 23, 2023

berrydunn.com

BerryDunn

Attachment B: Title Page, Vendor Information, Executive Summary, Subcontractor Letters, and Table of Contents

This section will provide instructions to vendors on what to include for the title page, vendor information, executive summary, how to include subcontractor letters, and table of contents.

![BerryDunn logo]

B.1 Title Page

The vendor should include a title page stating the vendor's intent to bid for this RFP. The vendor's response should include a Title Page; Table of Contents; Executive Summary; and vendor contact and location information.
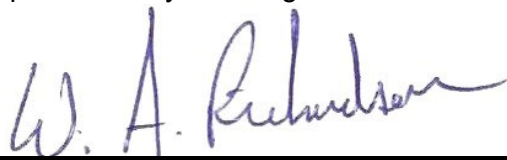
The vendor should include the following cover letter, signed in blue ink by an authorized signatory legally binding the vendor and include it in the labeled "Original Proposal."

The vendor should provide the following information regarding the person responsible for completing of the vendor response. This person should also be the person PRMP should contact for questions and/or clarifications.

Name	William A. Richardson	Phone	207-842-8023
Address	250 Avenida Luis Muñoz Rivera, Suite 1118	Fax	207-774-2375
	San Juan, PR 00918	Email	brichardson@berrydunn.com

Subject to acceptance by PRMP, the vendor acknowledges that by submitting a response and signing in the space indicated below, the vendor is submitting a formal offer to meet that which is being requested within this RFP.

Failure to sign the Submission Cover Sheet or signing it with a false statement shall void the submitted response or any resulting contracts.

[signature]   October 23, 2023

__Original signature__ of Signatory Authorized to Legally Bind the Company   / Date

Name (Typed or Printed)	William A. Richardson
Title	Principal
Company Name	Berry, Dunn, McNeil & Parker, LLC (doing business as BerryDunn)
Physical Address	250 Avenida Luis Muñoz Rivera, Suite 1118
	San Juan, PR 00918
State of Incorporation	Maine

![BerryDunn]

By signature hereon, the vendor certifies that:

1. All statements and information prepared and submitted in response to this RFP are current, complete, and accurate.

2. The vendor's response meets the requirement of this RFP.

3. The vendor will comply with all federal and Commonwealth laws, rules, and regulations that are in force currently or anytime during the term of a resulting contract.

4. The vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. PRMP will hold "confidential" all response information, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of proposals. All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded in accordance with the laws of Puerto Rico.

5. The company represented here is an authorized dealer in good standing of the products and services included in this response.

6. The vendor, any subcontracting partners, and its proposed resources are eligible to participate in this transaction and have not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity; are in compliance with the Commonwealth's statutes and rules relating to procurement; and are not listed on the federal government's terrorism watch list as described in Executive Order 13224. Entities ineligible for federal procurement are listed at https://sam.gov/content/home.

7. Prior to award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.

B.2   Vendor Information

The vendor should complete the following information in the subsections below:

- *Primary point of contact for any questions pertaining to the vendor's payment address.*
- *Address to which PRMP should send legal notices for any potential future agreements.*

B.2.1   Payment Address

In the table below, the vendor should provide the name, title, and address to which PRMP should direct payments for the goods and services within this RFP.

Table 1: Payment Information

| Payment Information:			
Name:	William A. Richardson	Title:	Principal
Address:	250 Avenida Luis Muñoz Rivera, Suite 1118		
City, State, and Zip Code:	San Juan, PR 00918		
Phone:	207-842-8023	Fax:	Fax: 207-774-2375
Email:	brichardson@berrydunn.com		

B.2.2   Legal Notice Address

In the table below, the vendor should provide the name, title, and address to which PRMP should send legal notices.

Table 2: Legal Notice Information

Payment Information:			
Name:	William A. Richardson	Title:	Principal
Address:	250 Avenida Luis Muñoz Rivera, Suite 1118		
City, State, and Zip Code:	San Juan, PR 00918		
Phone:	207-842-8023	Fax:	Fax: 207-774-2375
Email:	brichardson@berrydunn.com		

B.3 Executive Summary

This section should be a brief (one [1] to three [3] page) summary of the key aspects of the vendor's Technical Proposal. The Executive Summary should include an overview of the vendor's qualifications, approach to delivering the goods and services described in the RFP; time frame for delivering the goods and services; the proposed team; and the key advantage(s) of the vendor's proposal to PRMP.
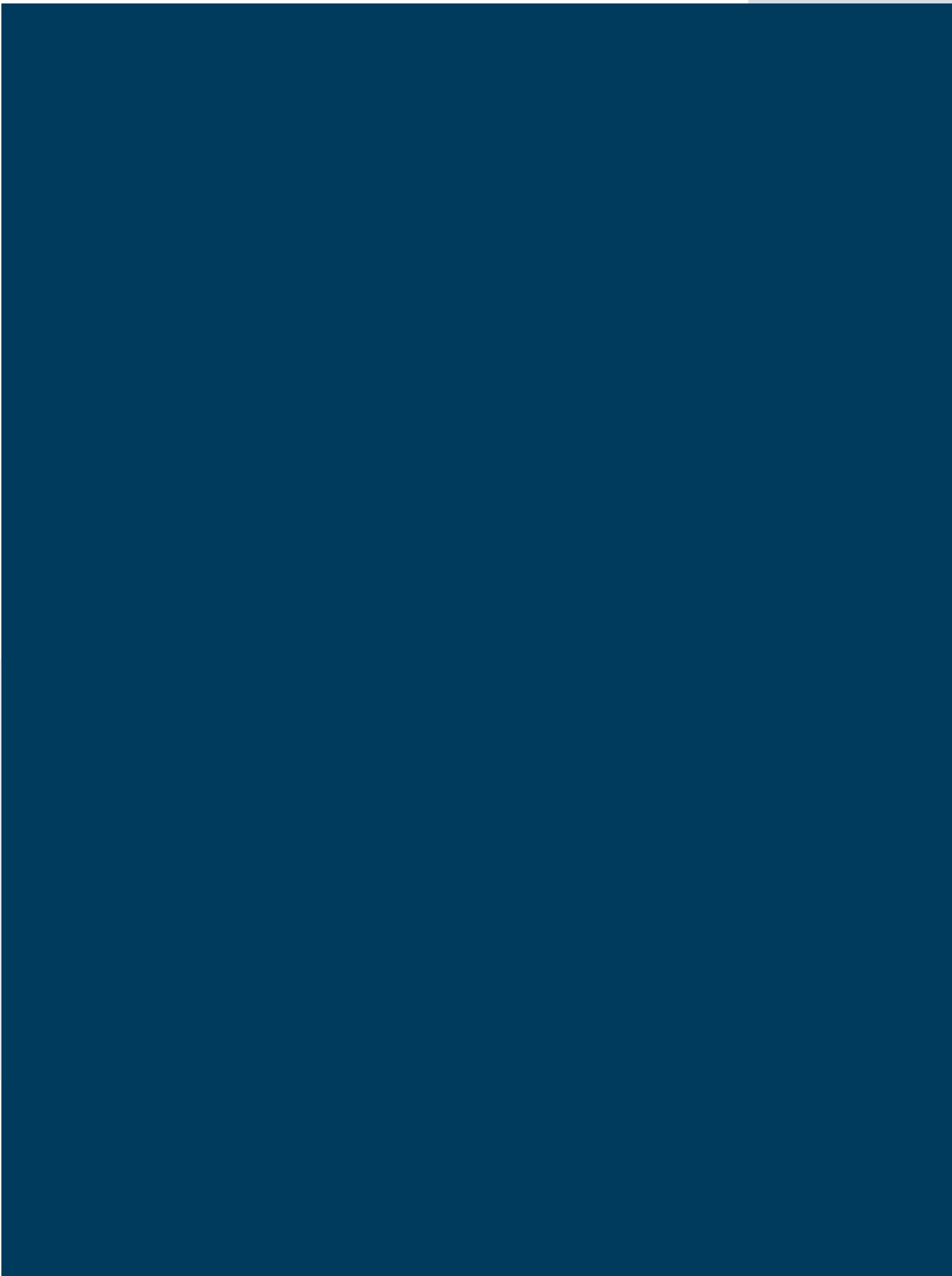
B.4   Subcontractor Letters (If Applicable)

If applicable, for each proposed subcontractor the vendor should attach to Attachment B: Title Page, Executive Summary, Subcontractor Letters, and Table of Contents a letter from the subcontractor, signed in blue ink by an authorized signatory legally binding the subcontractor, which includes the following information:

- *The subcontractor's legal status, federal tax identification number, DUNS number, and principal place of business address.*
- *The name, phone number, fax number, email address, and mailing address of a person who is authorized to legally bind the subcontractor to contractual obligations.*
- *A description of the work the subcontractor will perform.*
- *A statement of the subcontractor's commitment to performing the work if the vendor is selected.*
- *A statement that the subcontractor has read and understands the RFP and will comply with the requirements of the RFP.*
- *A statement that the subcontractor will maintain any permits, licenses, and certifications requirements to perform its portion of the work.*

This section is not applicable to our response. All proposed services will be provided by BerryDunn.

![BerryDunn logo]

B.5 Table of Contents

This section should contain a table of contents. The table of contents should include all parts of the proposal, including response forms, and attachments, identified by section and page number. The Table of Contents should also include a Table of Tables, Table of Figures, etc.

Section   **Page**

Table of Tables

Table of Figures

B.6 Disclosure of Response Contents

All vendors, selected for negotiation by PRMP, will be given equivalent information concerning cost negotiations. All cost negotiations will be documented for the procurement file. Additionally, PRMP may conduct target pricing and other goods or services level negotiations. Target pricing may be based on considerations such as current pricing, market considerations, benchmarks, budget availability, or other methods that do not reveal individual vendor pricing. During target price negotiations, vendors are not obligated to reduce their pricing to target prices, but no vendor is allowed to increase prices.

All materials submitted to PRMP in response to this RFP shall become the property of the Government of Puerto Rico. Selection or rejection of a response does not affect this right. By submitting a response, a vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. If a vendor determines there is a "Trade Secret" contained in the proposal, the vendor must send a written notification to the Solicitation Coordinator when submitting the proposal to prevent public disclosure of the "Trade Secret." A redacted version of the technical proposal must be provided to PRMP at the time of proposal submission if there are "trade secrets" the proposing Vendor wishes to not be made public.

A redacted proposal should be provided separately from the technical and cost envelopes and should be in addition to (not in place of) the actual technical or cost proposal. PRMP will keep all response information confidential, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of proposals.

Upon completion of response evaluations, indicated by public release of a Notice of Award, the responses, and associated materials will be open for review on the website or at an alternative location as defined by PRMP. Any trade secrets notified by the vendor to the Solicitation Coordinator will be excluded from public release.

By signing below, I certify that I have reviewed this Request for Proposal (and all of the related Amendments) in its entirety; understand the requirements, terms, and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the vendor to execute this bid or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that, to the best of my knowledge, the vendor has properly registered with any Puerto Rico agency that may require registration.

Berry, Dunn, McNeil & Parker, LLC
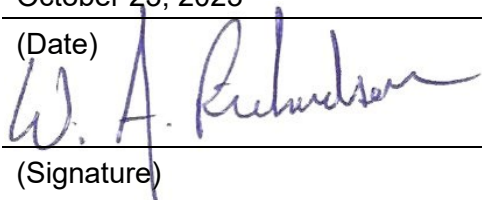
(Company)

William A. Richardson, Principal

(Representative Name, Title)

207-842-8023/207-774-2375

(Contact Phone/Fax Number)

October 23, 2023

(Date)

(Signature)

Attachment C: Vendor Qualifications and Experience

This section will provide instructions to vendors to complete information required for the organizational overview, corporate background, experience in the public sector, and certifications.

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C.1   Organization Overview

This section of the vendor's Technical Proposal should include details of the vendor and subcontractor overview.
The vendor's Technical Proposal should include:

- *Organization overview,*
- *Corporate background,*
- *Vendor's experience in the public sector,*
- *Certifications.*

C.1.1   Organization Overview

Provide all relevant information regarding the general profile of the vendor.

<u>Vendors are NOT to change any of the pre-filled cells in the following tables.</u>
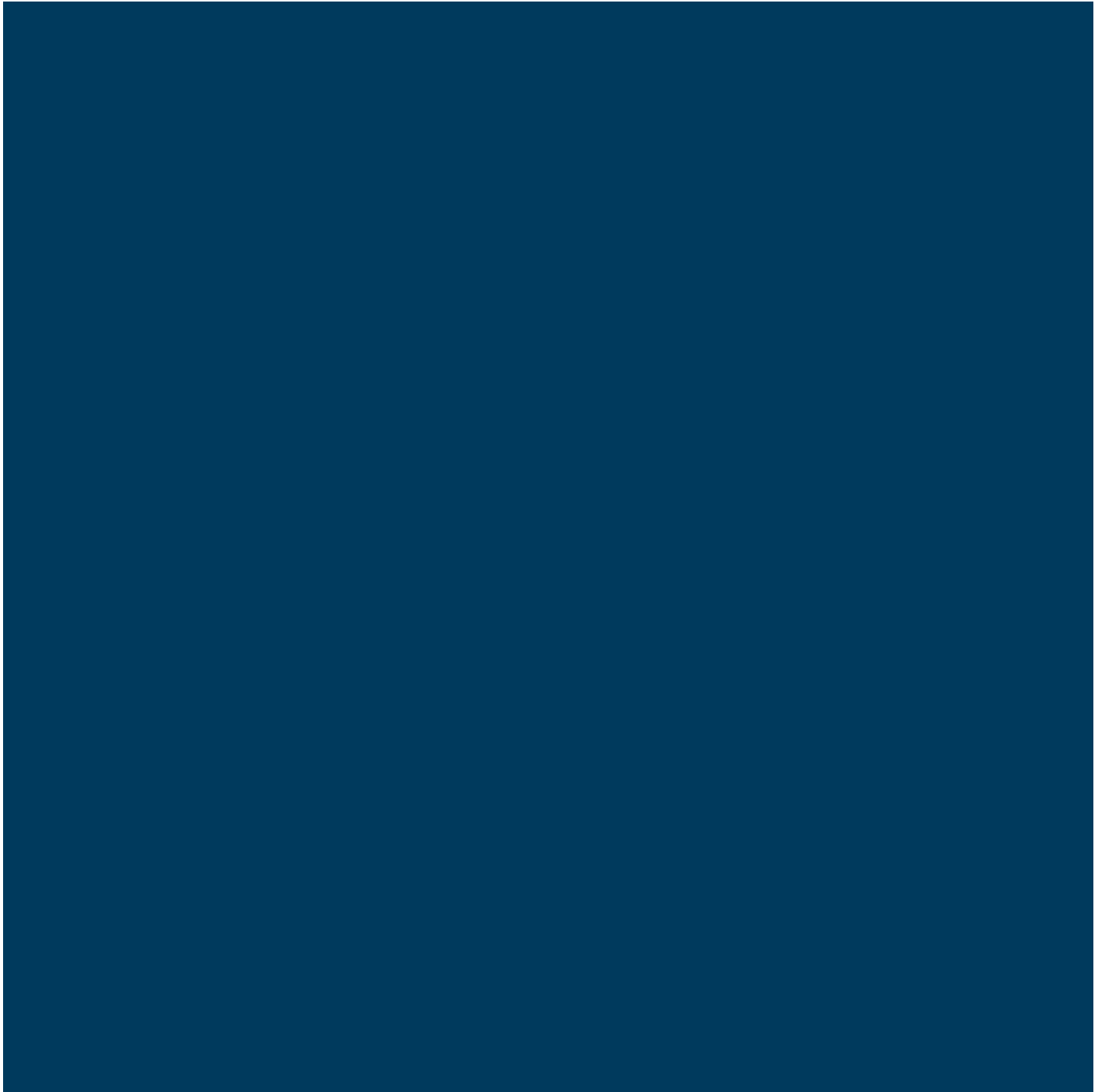
C.1.2 Subcontractor Overview (If Applicable)

If the proposal includes the use of subcontractor(s), provide all relevant information regarding each subcontractor.

This section is not applicable to our response. All services will be provided by BerryDunn.

C.2 Mandatory Qualifications

This section details the mandatory qualifications. The vendor must complete this section to demonstrate that it has the experience needed to meet the requirements in this RFP. The table below lists each mandatory qualification, the vendor must note whether it meets the qualification and provide narrative demonstrating fulfillment of the requirement. The vendor must list each experience separately and completely every time it is referenced.
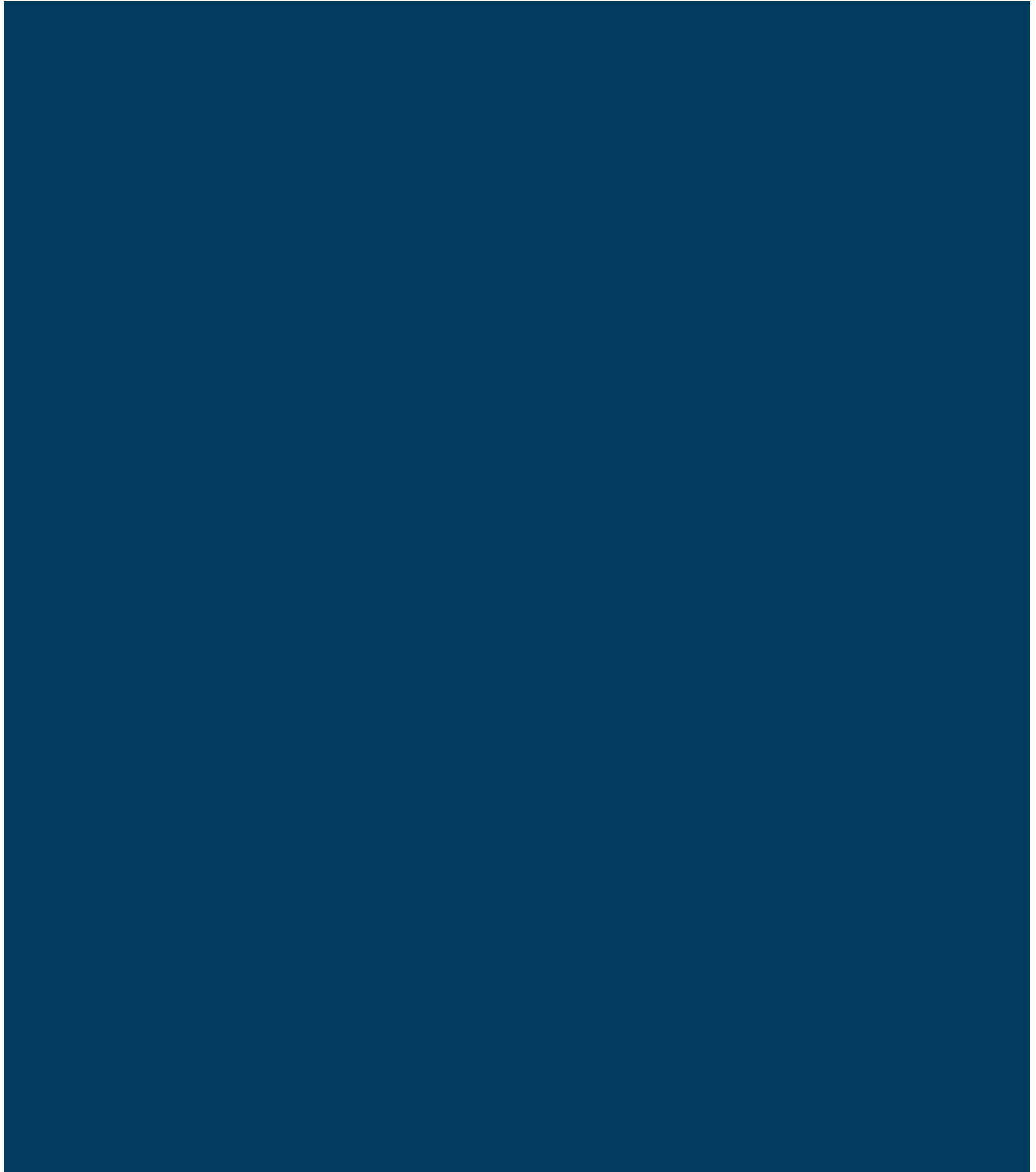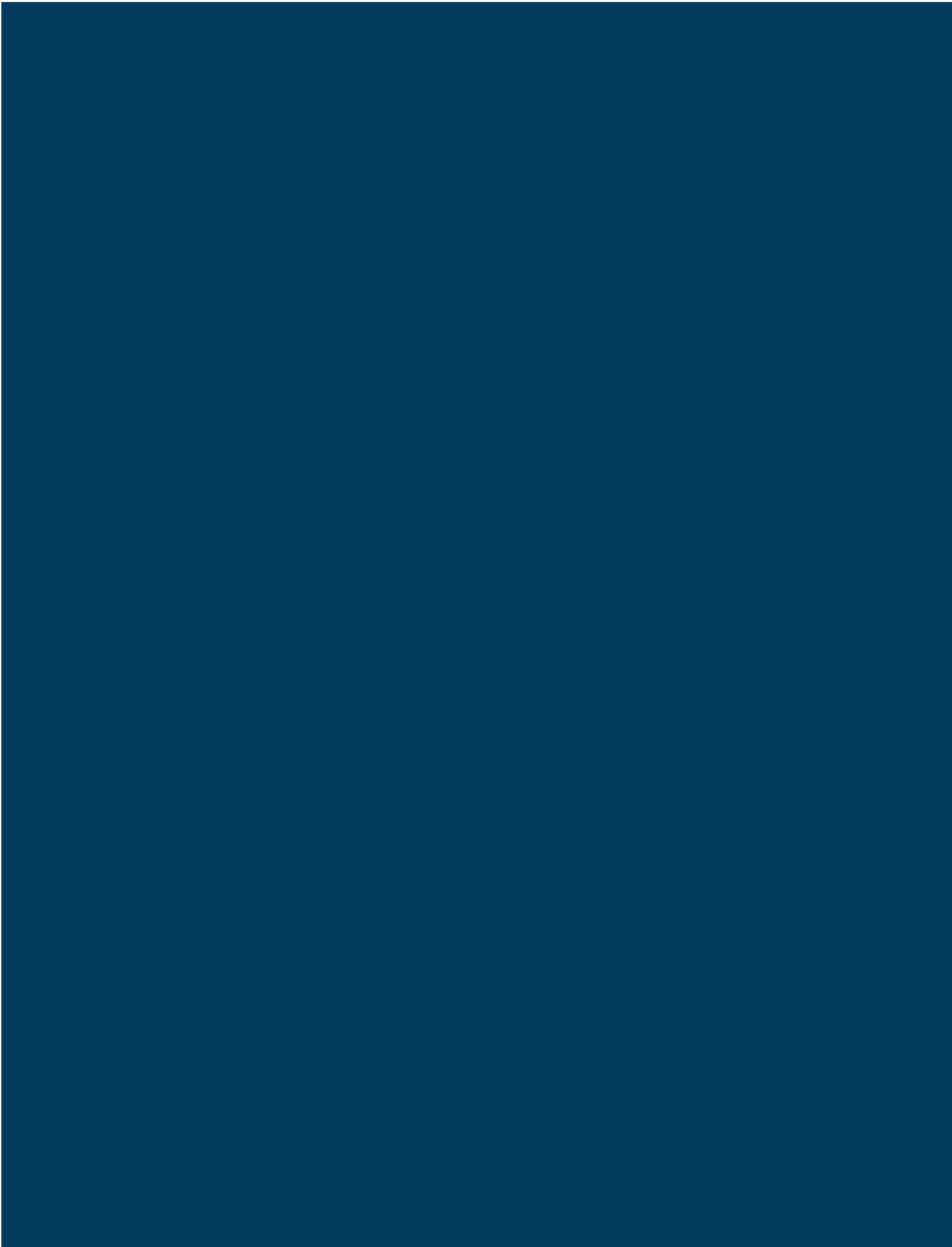
C.3 Existing Business Relationships with Puerto Rico

Describe any existing or recent (within the last three [3] years) business relationships the vendor or any of its affiliates or proposed subcontractors have with PRMP, and/or Puerto Rico's municipalities.

C.4   Business Disputes

Provide details of any disciplinary actions and denote any that are pending litigation or Terminated for Cause or Convenience and associated reasons. Also, denote any other administrative actions taken by any jurisdiction or person against the vendor. List and summarize all judicial or administrative proceedings involving your sourcing activities, claims of unlawful employment discrimination, and anti-trust suits in which you have been a party within the last five (5) years. If the vendor is a subsidiary, submit information for all parent companies. If the vendor uses subcontractors, associated companies, or consultants that will be involved in the service areas, each of these entities will submit this information as part of the response.

C.5   References

The vendor must provide references for similar services completed in the past. PRMP may conduct reference checks to verify and validate the past performance of the vendor and its proposed Subcontractors.

C.5.1   Vendor (Prime) References Form

Include at least three (3) references from clients performed within the last three (3) years that demonstrate the vendor's ability to perform the scope of work described in this RFP. PRMP prefers references from three (3) different clients to demonstrate experience; however, this is a not a requirement.

The vendor should include a description of the similar services, contract dates, and contact information (customer points of contact, addresses, telephone numbers, and email addresses). The vendor should explain whether it performed the work as a prime contractor or as a subcontractor.

The vendor is NOT to change any of the pre-filled cells in the following tables. The vendor may add additional reference tables as necessary.
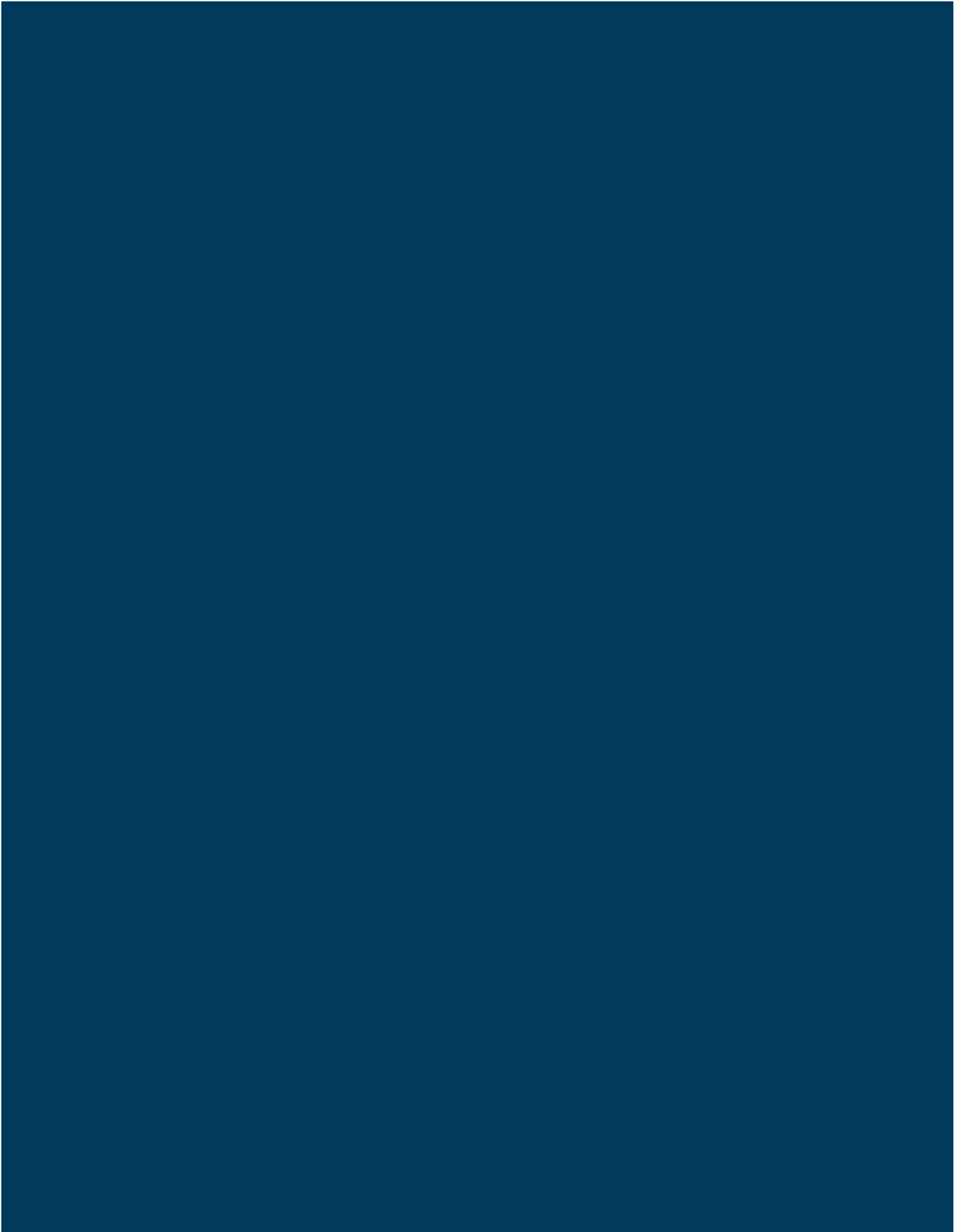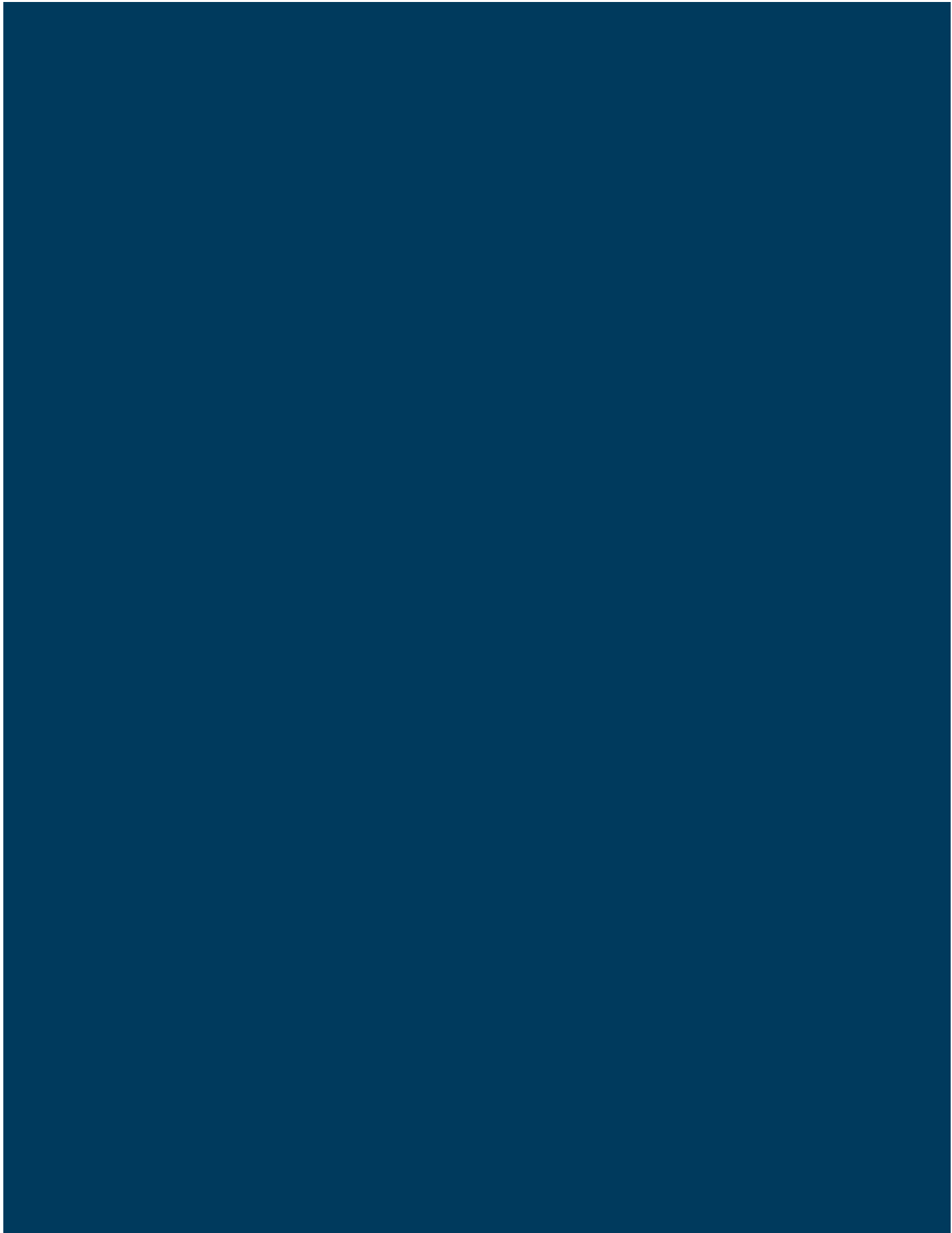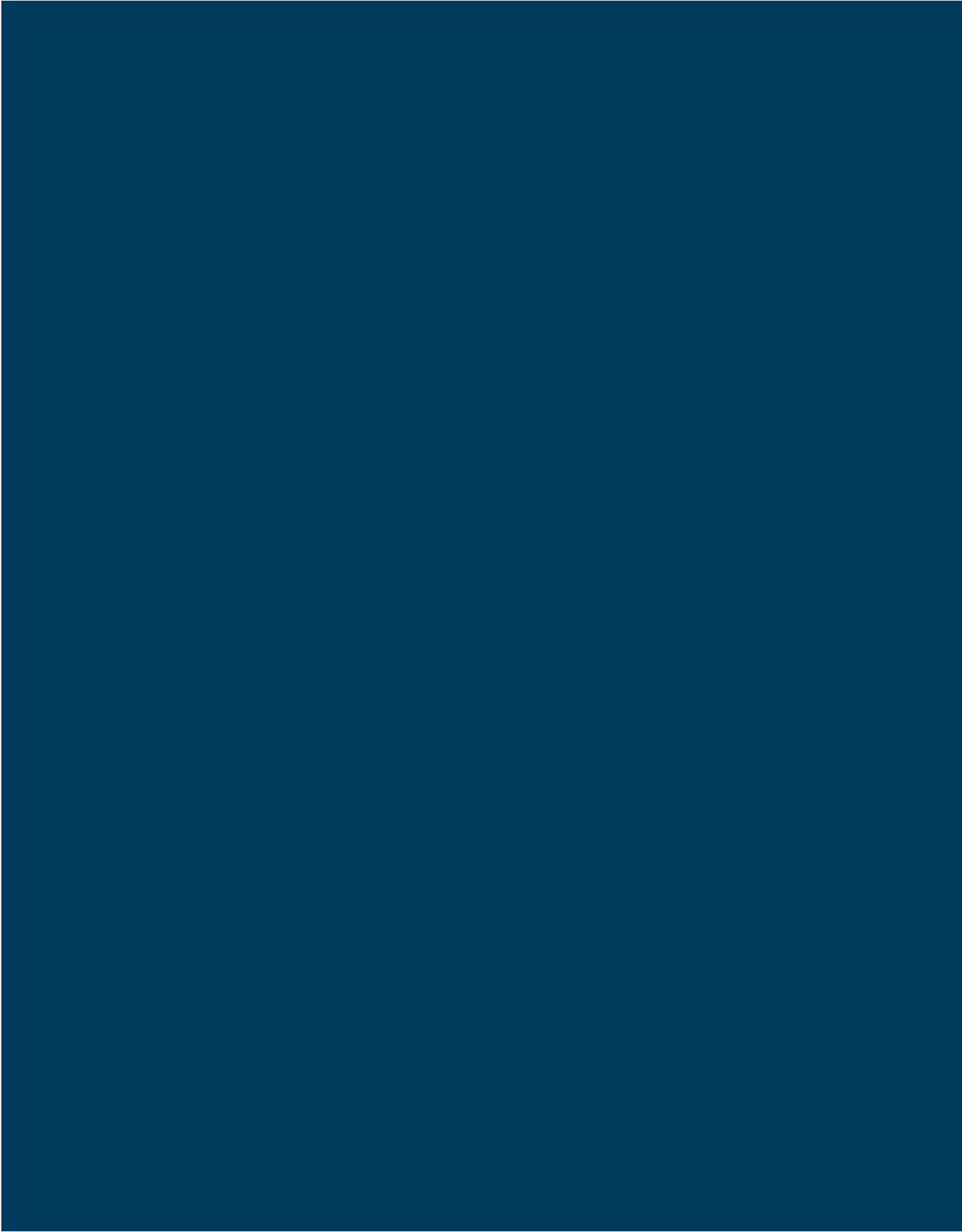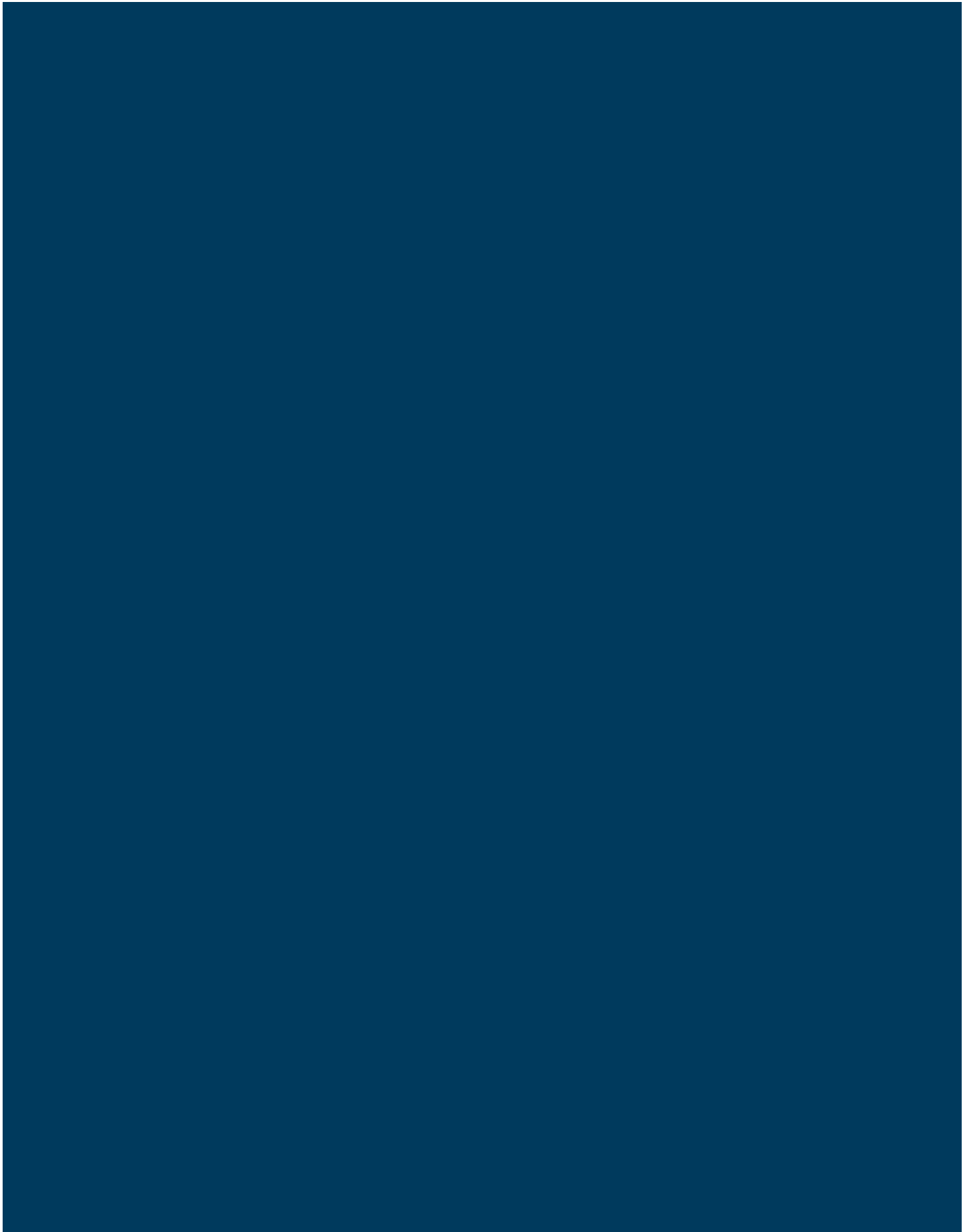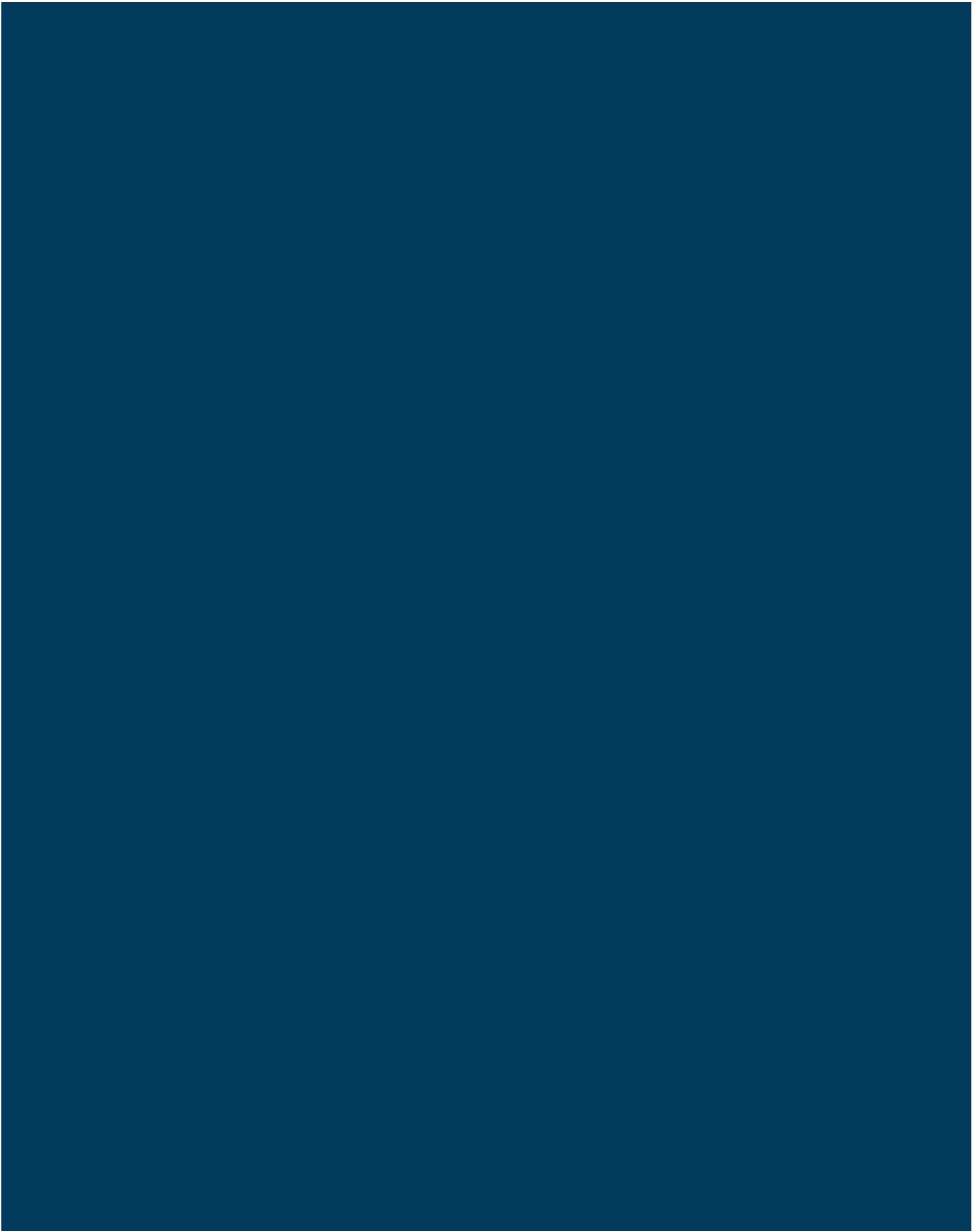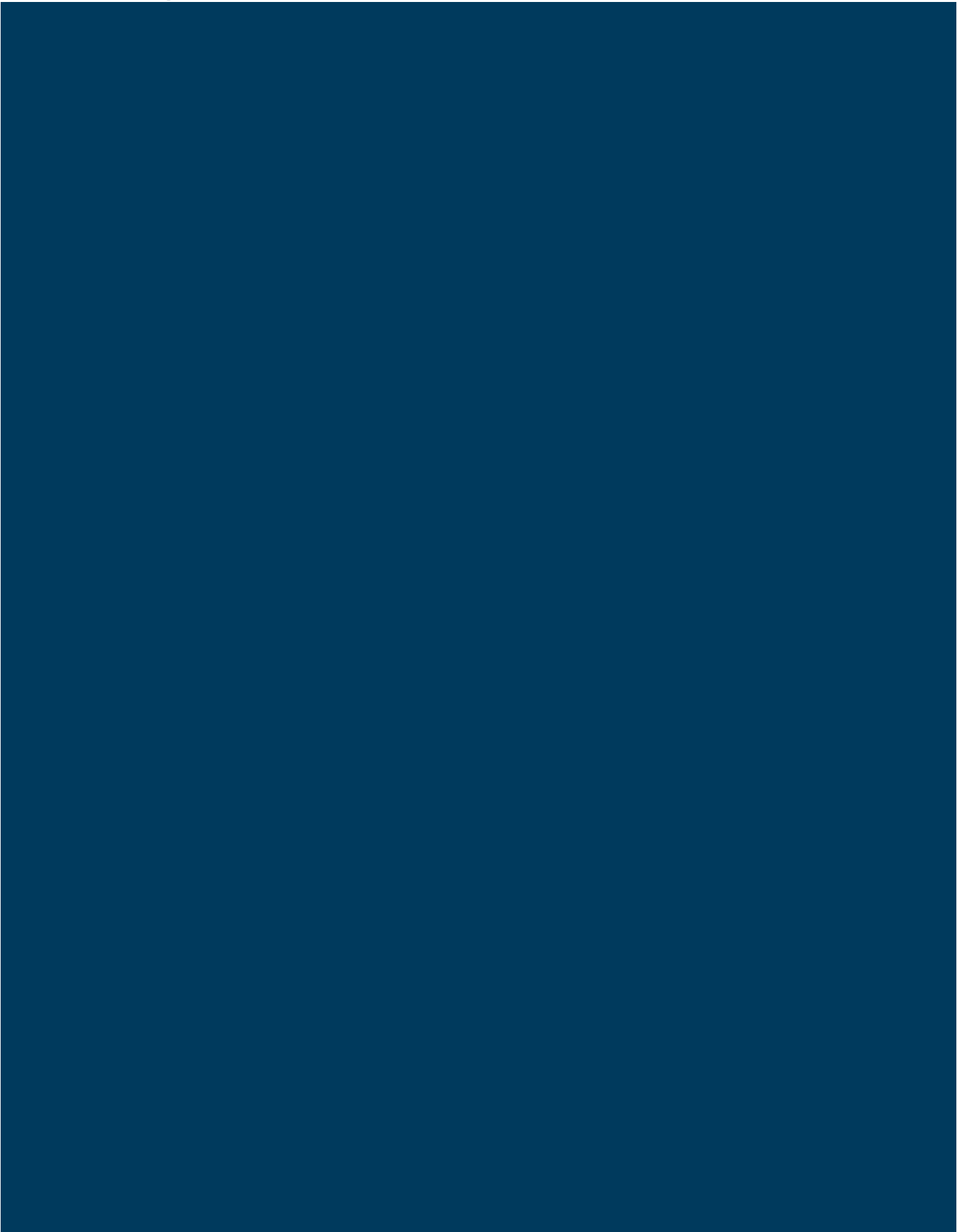
C.5.2   Subcontractor References (If Applicable)

If the vendor's proposal includes the use of subcontractor(s), provide three (3) references for each subcontractor. The Commonwealth prefers references that demonstrate where the prime and subcontractors have worked together in the past.

BerryDunn is not proposing the use of any subcontractors.

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Attachment D: Organization and Staffing

This section will provide instructions to vendors to submit their overall approach to staffing the Service Areas using <u>*Attachment D: Organization and Staffing.*</u>

Instructions: Staffing strategies are to be employed by the vendor to help ensure all requirements and service levels are met to the satisfaction of PRMP. The evaluation of the vendor's staffing approach shall be based on the ability of the vendor to satisfy the requirements stated in this RFP. Therefore, the vendor should present detailed information regarding the qualifications, experience, and expertise of the proposed staff and an Initial Staffing Plan.

For ease of formatting and evaluation, <u>*Attachment D: Organization and Staffing*</u> *provides the required outline for the vendor's response to staffing. The vendor's response to the following should not exceed 25 pages, excluding key personnel resumes and the forms provided in this attachment.*

Please refer to <u>*Appendix 2: Staff Qualifications, Experience, and Responsibilities*</u> *of the RFP for the details pertaining to staff qualifications, experience, and responsibilities.*

D.1 Initial Staffing Plan

As part of the vendor's bid response, the vendor should provide an Initial Staffing Plan. In addition to the requirements described in __Attachment E: Mandatory Requirements__ the vendor's narrative description of its proposed Initial Staffing Plan should include the following:

BerryDunn brings to PRMP a trusted project team with the right blend of local, federal, and state Medicaid agency experience that meets and exceeds all requirements in the RFP. Our initial staffing plan is a team of highly experienced professionals—comprising over 16 business leads and 26 subject matter experts (SMEs)—each of whom have deep expertise and experience partnering with PRMP and/or other Medicaid Agencies to help clients achieve their program goals. The breadth of the teams knowledge is merely one indicator of the specialized knowledge and experience PRMP needs, and BerryDunn is prepared to deliver. Our team knows PRMP and its needs, and we remain ready to continue serving as its success partner.

BerryDunn's initial staffing plan has been developed using the same principles that fueled PRMP's Medicaid enterprise success since 2019:

- **Our team's experience aligns with PRMP's needs.** We will use our experience supporting 31 Medicaid agencies, applying BerryDunn's over 30 years of portfolio, program, and project management related experience to continue assisting PRMP with achieving their Medicaid enterprise goals. In those instances when the steps to meet PRMP's goals are not clear, we will use our team's ability to connect with PRMP as well as our team's expertise in Medicaid policy, finance, member eligibility, provider enrollment and credentialing, and governance to help ensure needs are met.

- **Our team's ability is known to PRMP and other Medicaid agencies.** Our industry leading experts have partnered with PRMP through three system implementations, two successful Outcomes-based Certification (OBC) / Streamlined Modular Certification (SMC) efforts, and over 20 policy initiatives and helped PRMP establish the governance that manages the PRMP Medicaid enterprise today. These accomplishments are a representation of the value BerryDunn has provided PRMP and other Medicaid agencies since 2019, and is prepared to continue providing PRMP in the years to come.

- **Our team is comprised of local and available resources who help drive PRMP's success.** Our initial staffing plan has 7 local resources, 10 bilingual resources, and a rotating team of three to four that are committed to being on-site and readily available in BerryDunn's San Juan office—a mere tenth of a mile from PRMP's central office. Further, our staffing plan continues the long-standing and proven tradition of having at least three to four business leads, SMEs, and/or business analysts on-site each week to maintain those long-standing relationships and to continue support PRMP's priorities.

BerryDunn's experience has taught us that experienced, dependable, and relationship focused teams are the best partners for state Medicaid agencies. In support of this understanding, our initial staff plan helps ensure PRMP has proven partners who can help navigate their next challenge. To conquer the challenges that lie ahead, BerryDunn's response detailed in **Section F.3** of this RFP includes the following key roles:

- Account Manager
- Lead Program Manager
- Program Managers
- Business Leads / SMEs
- Business Analysts

Each project team has the support of variable staff to rely on should PRMP's business needs require us to flex for short and long-term assignments. Those variable staff include both non-key and key staff who are also strategically assigned to support multiple services areas. The following identifies variable roles BerryDunn sees as necessary to support PRMP's needs:

- Business Leads
- SMEs
- Business Analysts
- Staff Consultants
- Project Coordinators
- Interns
- Editorial / Quality Assurance (E/QA)

BerryDunn's proven staff management approach helps ensure BerryDunn provides PRMP with a scalable staffing model complete with core and variable team members best equipped to meet and exceed PRMP's needs. Leveraging the PMBOK® Guide proven staff management methodology, BerryDunn executed the following approach to help ensure staff be immediately available and capable to meet PRMP's demands on day one of contract execution:

- The current business leads working with PRMP today, who are knowledgeable of PRMP's existing enterprise, developed a list of tasks in support of the narratives detailed in **Section F.3** of this proposal.

- The current business leads developed an initial budget and schedule to support **Section F.3** of this proposal.

- The current business leads collaborated with program managers and the lead program manager to help ensure the right number of staff and the right level of expertise was assigned to each service area.

- The level of review from program managers and the lead program manager helped to ensure that resources allocated to other service areas and programs were not over- or under-allocated in their assignments as of the time of this proposal.

- The lead program manager collaborated with program managers to finalize resource assignments and as a part of this effort, collaborated with the account manager to help ensure the firm commitment for the proposed team would be fulfilled for the life of the contract.

The above approach resulted in the identification of a staffing plan that includes 55 team members deeply familiar with PRMP's existing enterprise and/or ready to engage in support PRMP. The above

approach also resulted in the identification of new team members ready to engage and further PRMP's success.

If support is needed beyond the variable staff listed in this section, BerryDunn can rely on the network of over 850 experts available within the firm, available via BerryDunn proven subcontractor agencies, or accessible through BerryDunn's team of dedicated recruiters. For more detail on BerryDunn's staff management approach, please refer to **Section F.4.b, F.4.d, F.4.f, and F.5.c.**

BerryDunn's staffing approach helps ensure PRMP has a team that can be scaled to support a range of needs. By leveraging BerryDunn's dependable, experienced, and familiar resources, PRMP can trust their Medicaid enterprise journey will not falter nor will it require time to be devoted to educating and/or onboarding new vendors. PRMP's trusted BerryDunn team is already engaged, already equipped, and already known as a proven success partner to PRMP.

D.1.1   Proposed Project Team and Qualifications

- *A description of the vendor's proposed team that exhibits the vendor's ability and capability to provide knowledgeable, skilled, and experienced personnel to accomplish the Scope of Work (SOW) as described in this RFP.*

BerryDunn
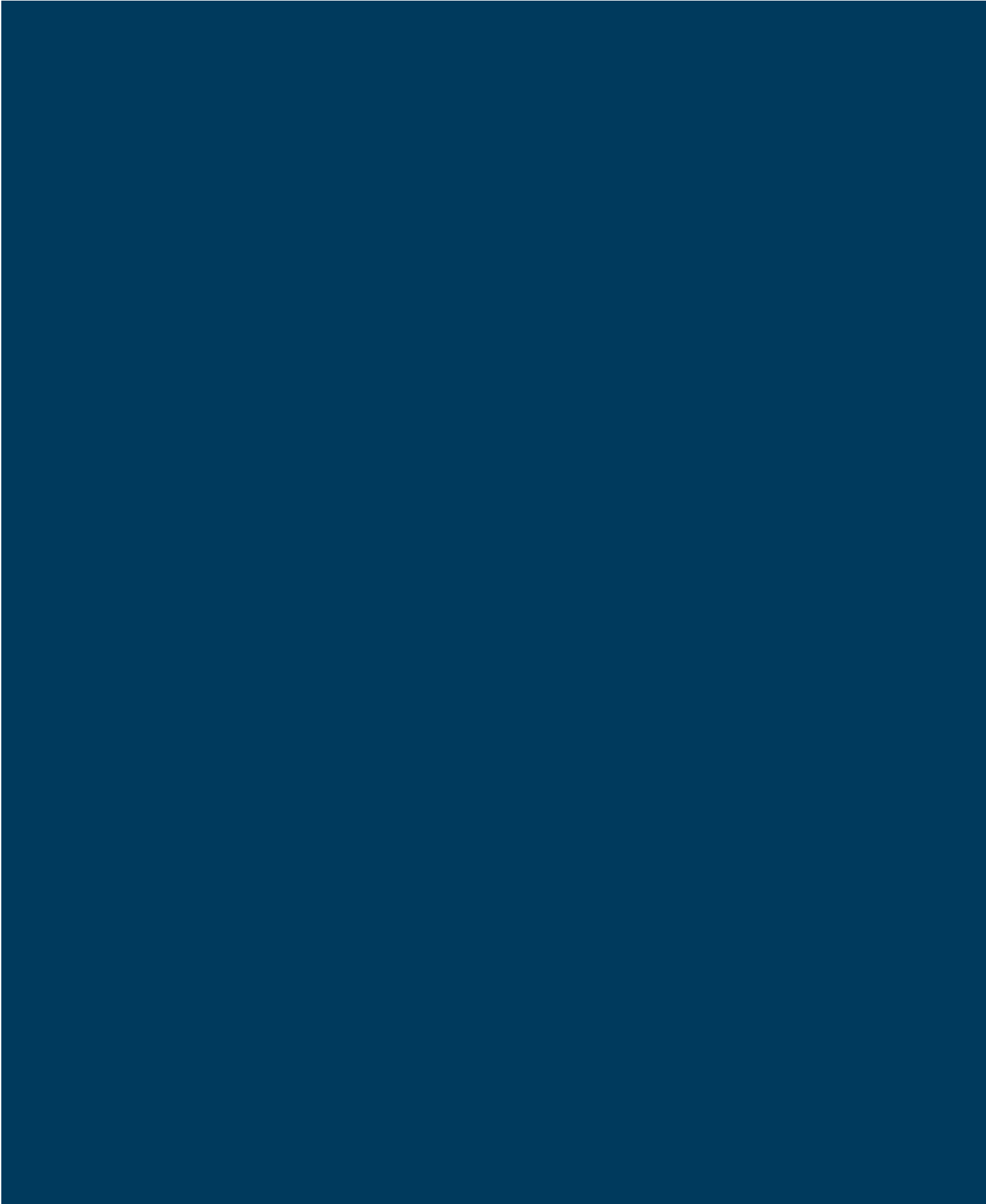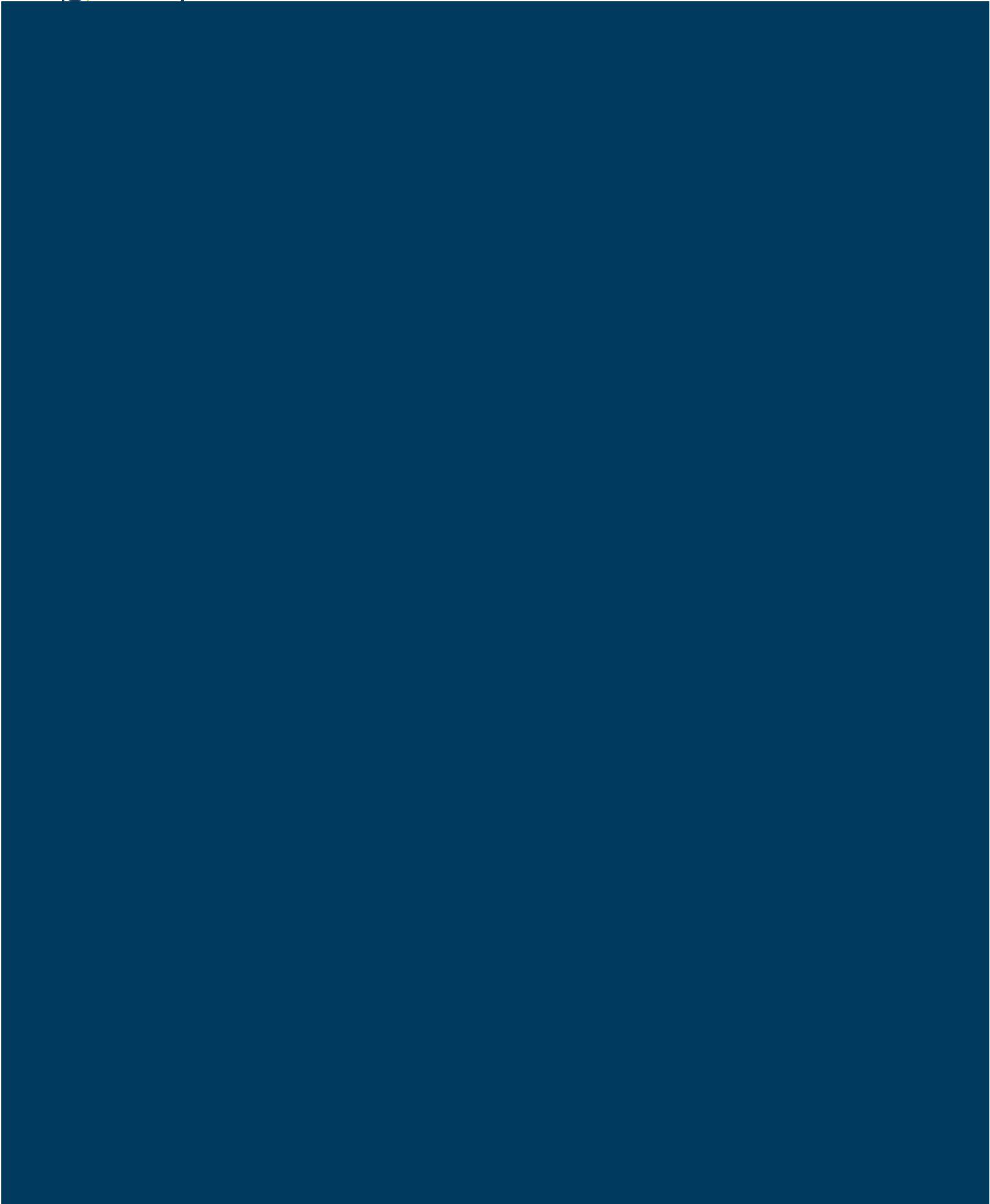
D.1.2 MES EOMC Organizational Chart and Responsibilities

- *Organization charts showing both the vendor staff and their relationship to PRMP staff that will be required to support the Service Areas. The organization chart should denote all key staff and non-key positions for this service, and a summary of each key staff member's responsibilities.*
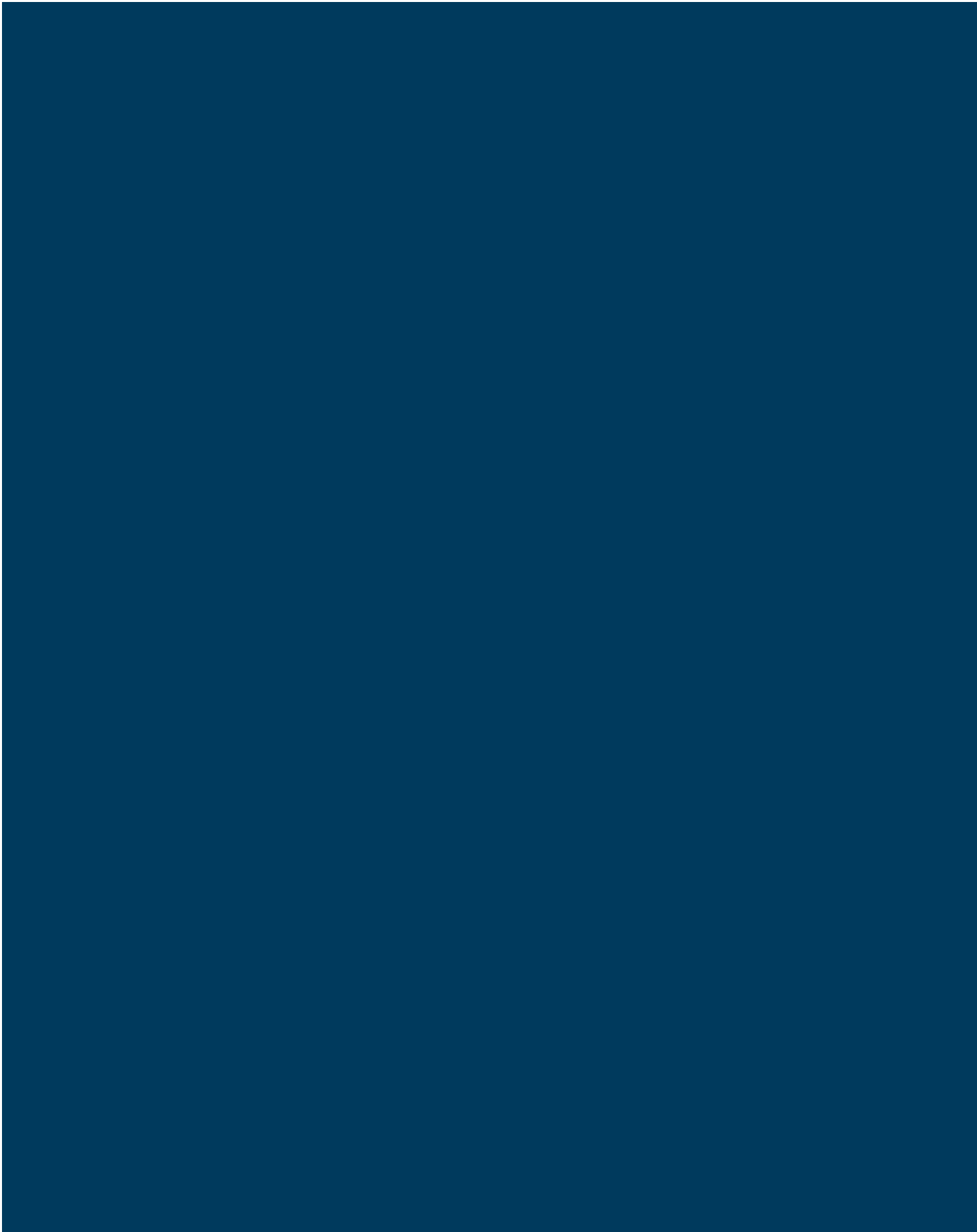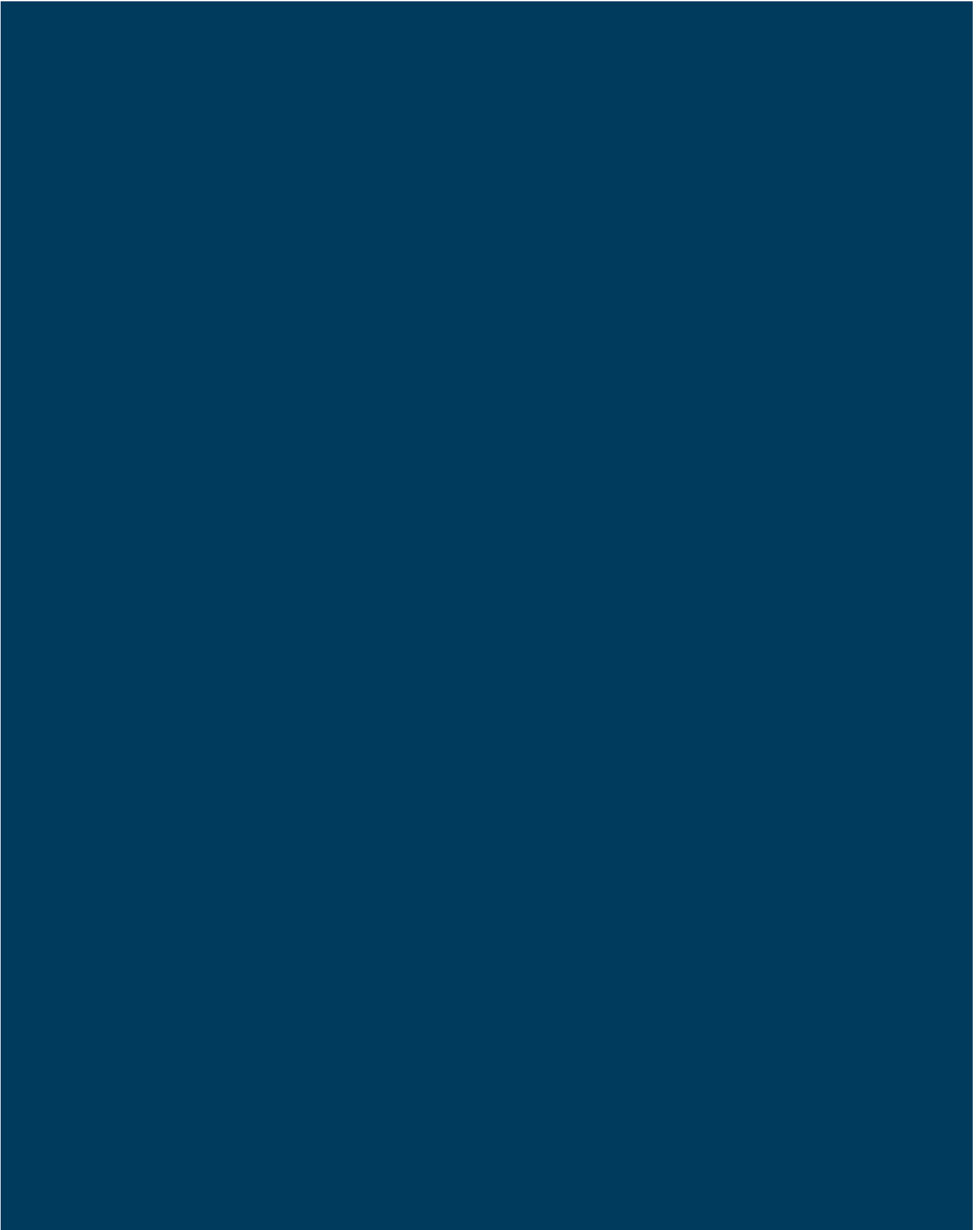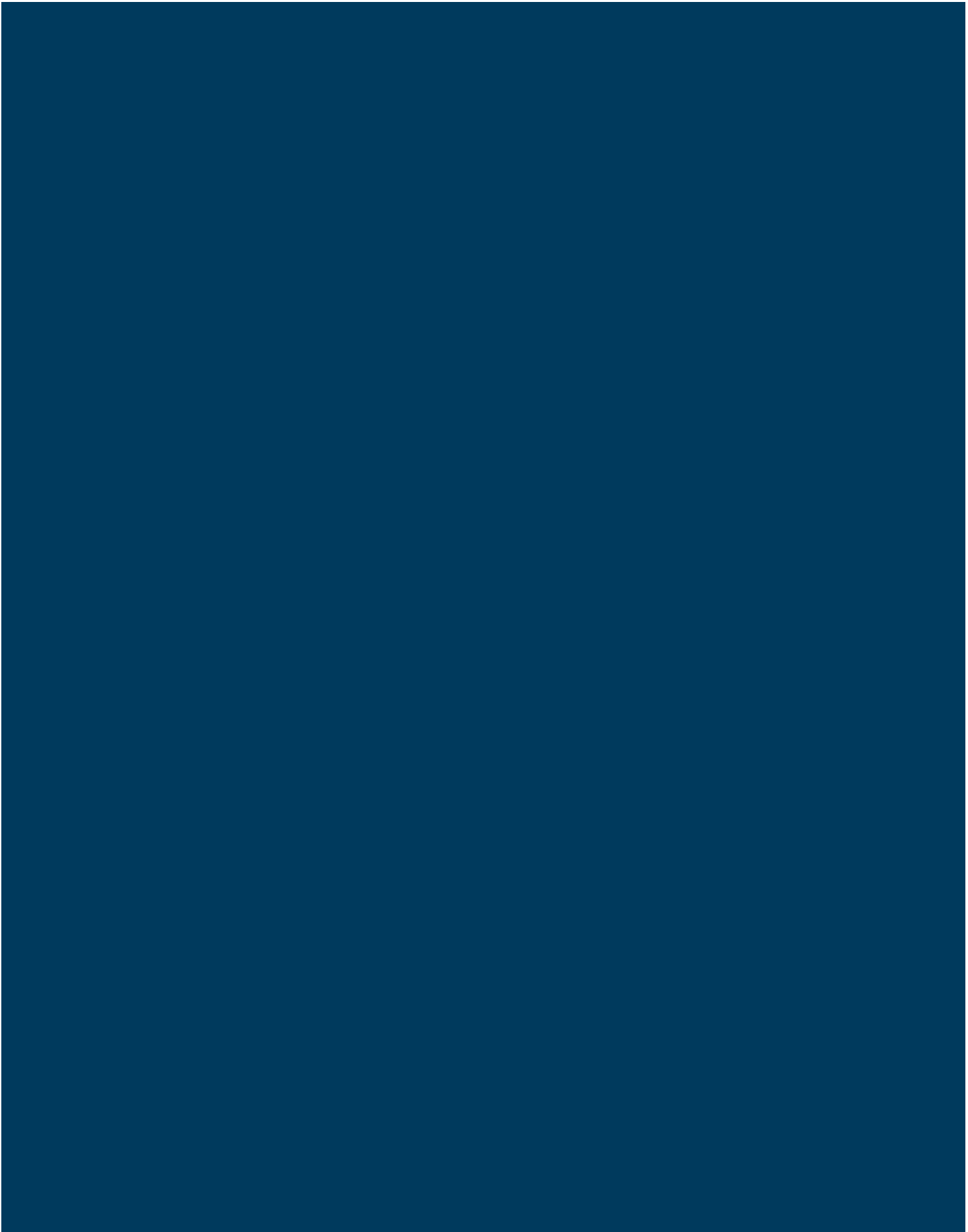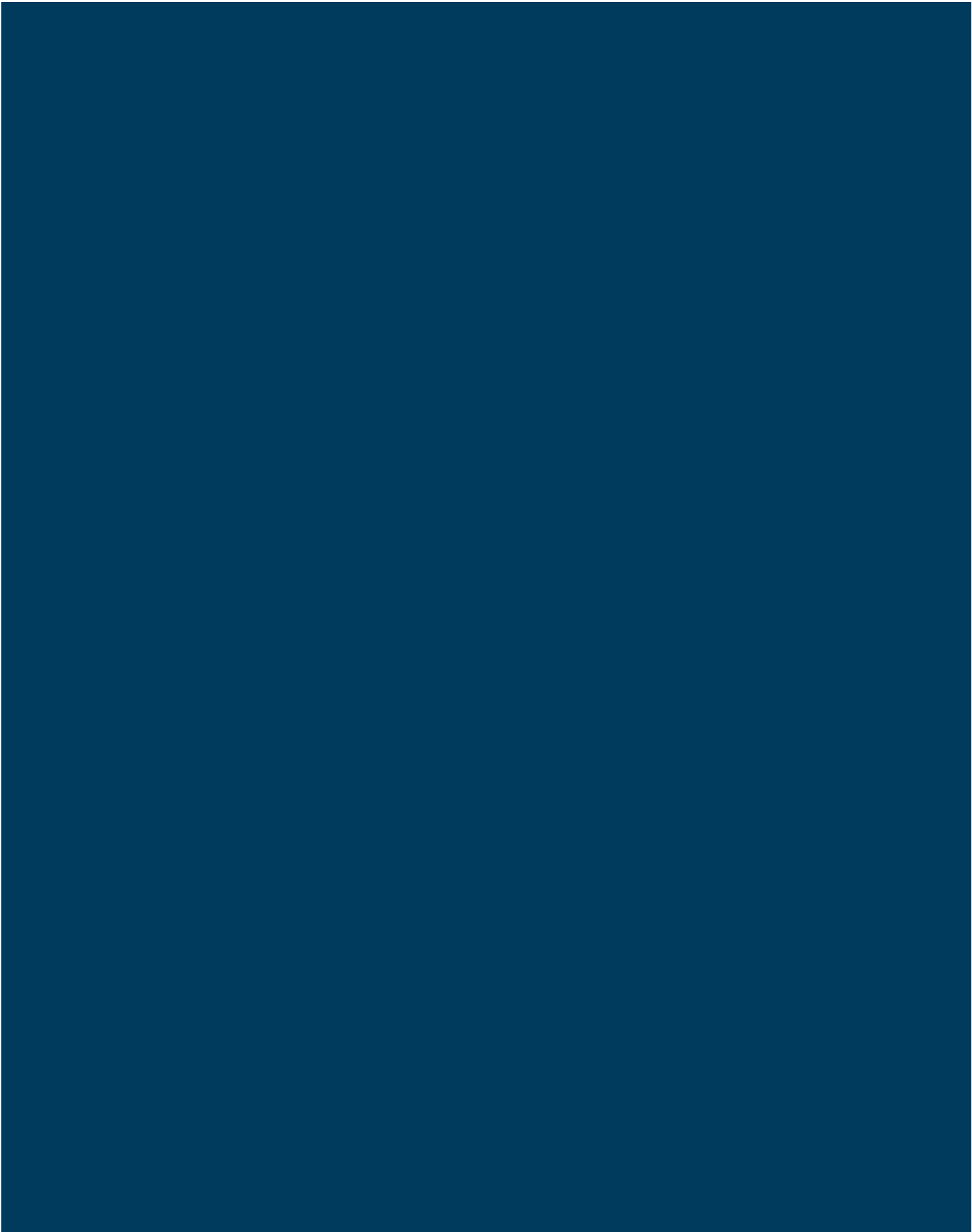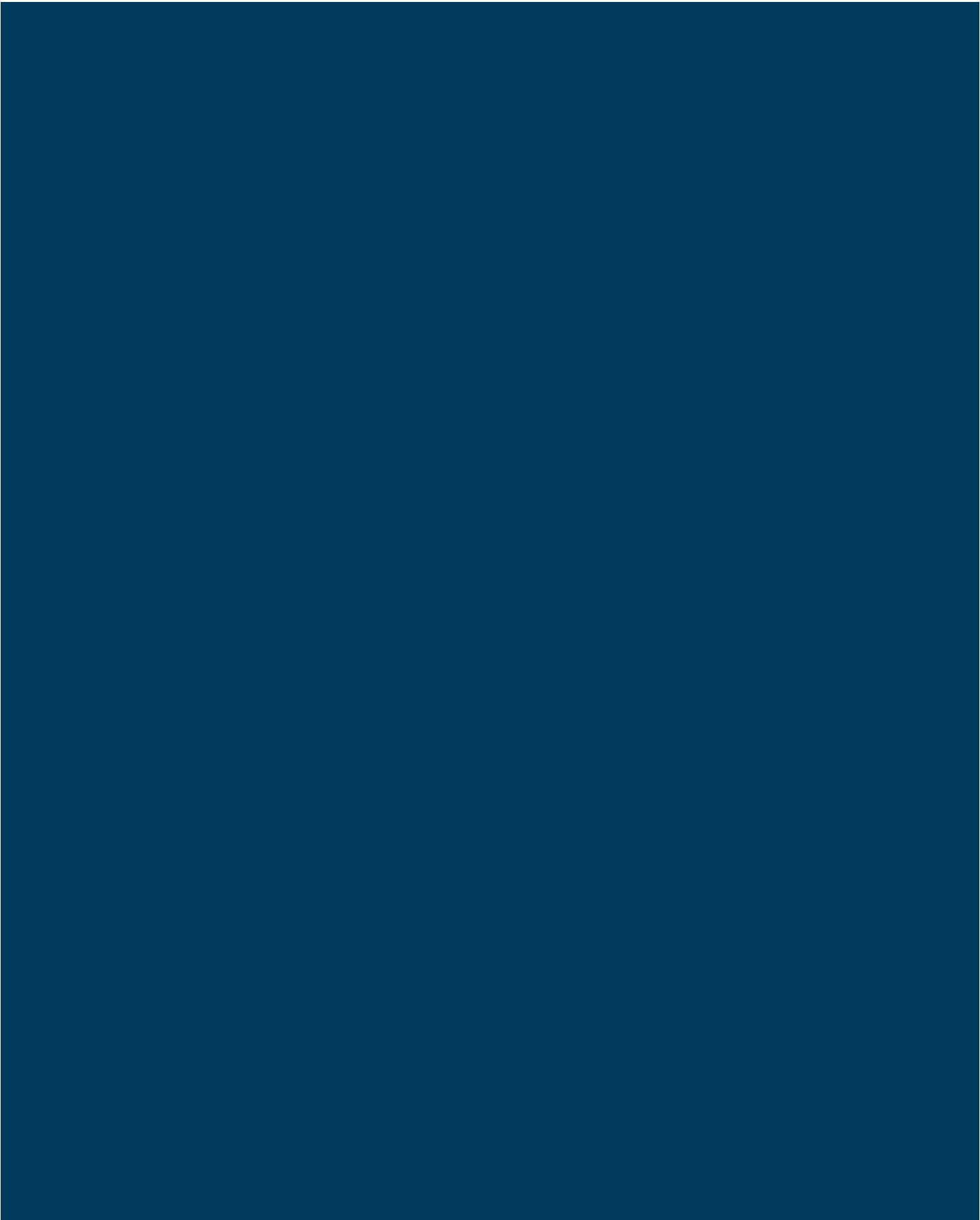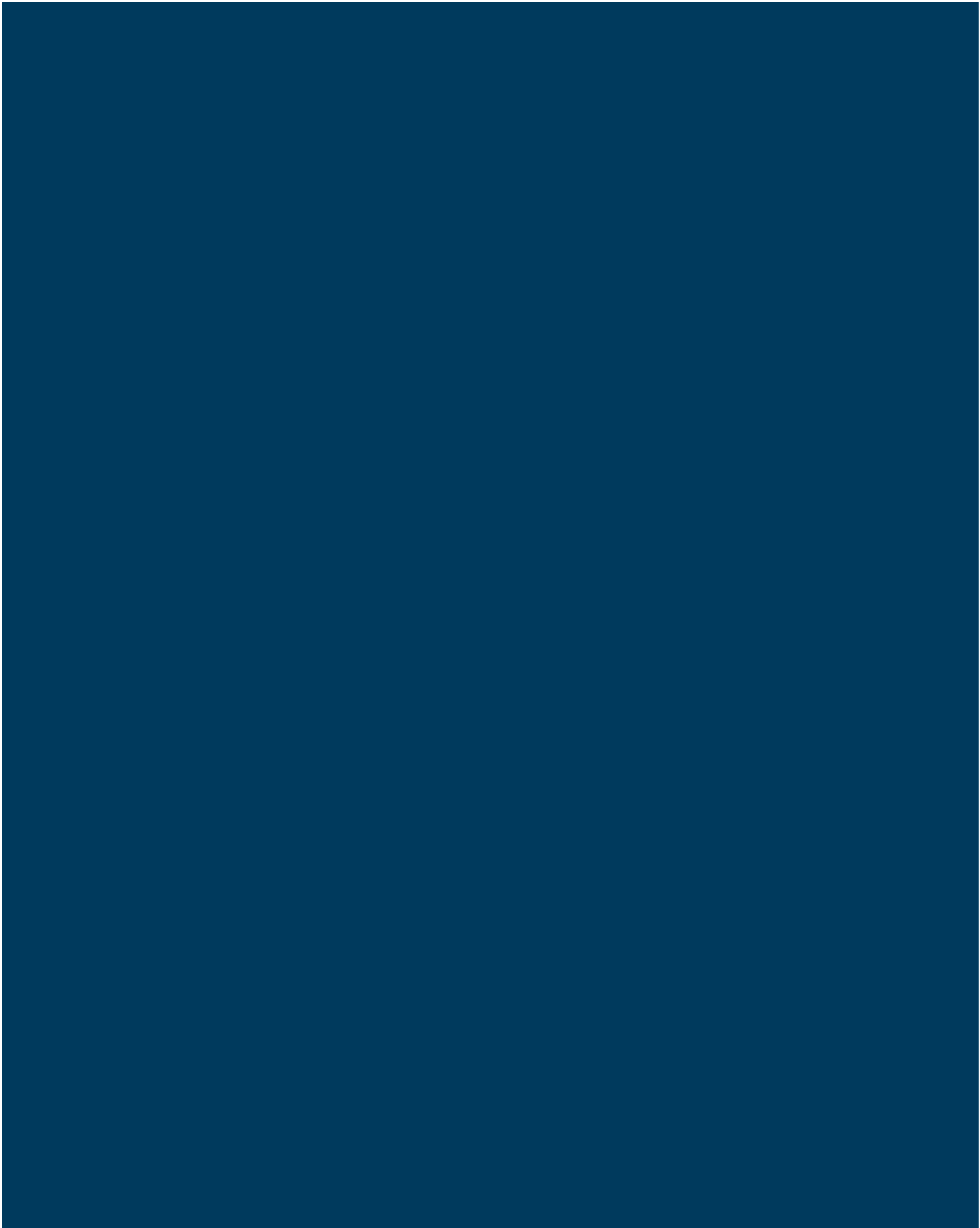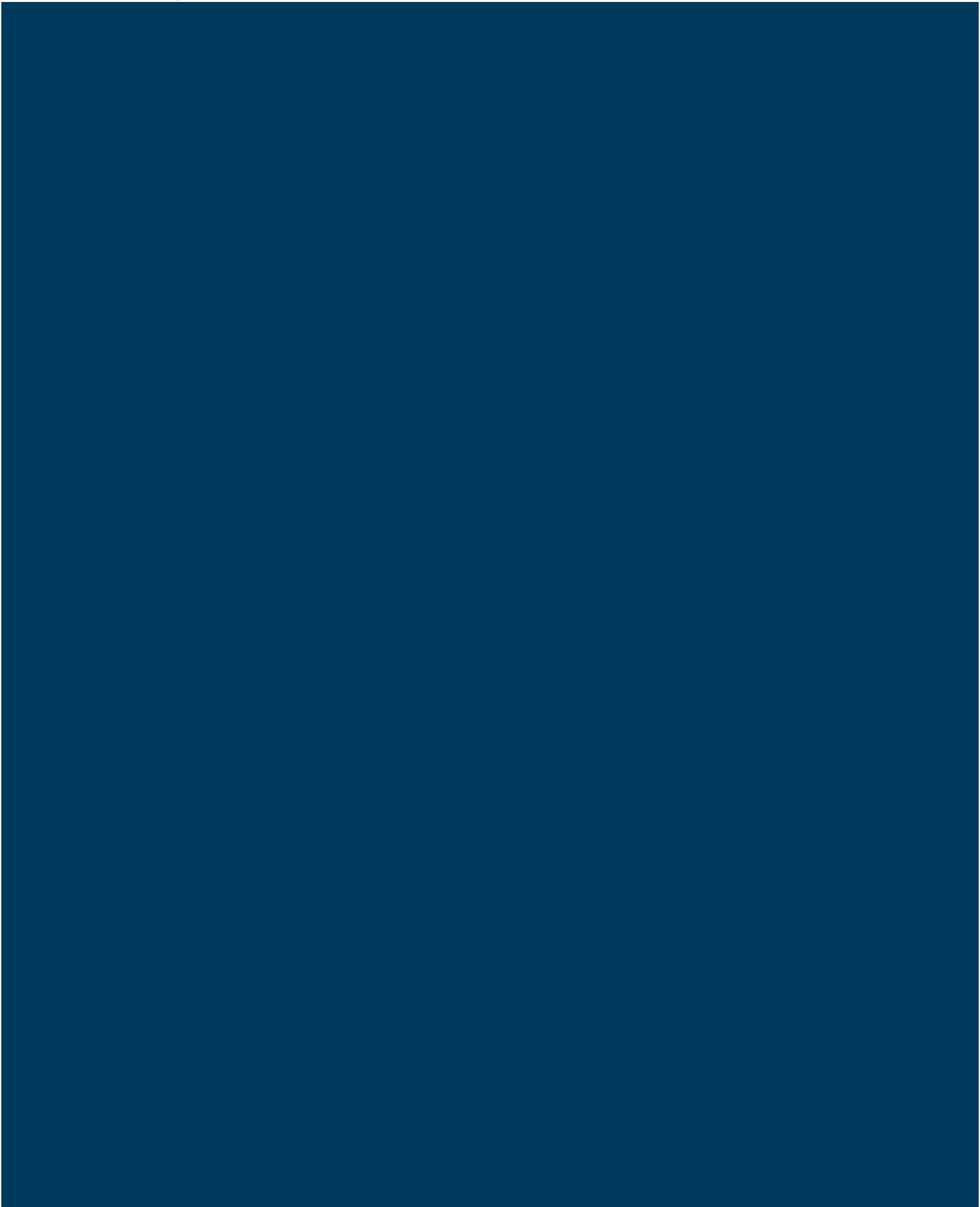
D.1.3   Subcontractor Staff

- *Identification of subcontractor staff, if applicable.*

BerryDunn is not proposing the use of any subcontractor staff.

D.2   Use of PRMP Staff

Describe the business and technical resources PRMP should provide to support the development, review, and approval of all deliverables as well as the staff necessary to help ensure successful completion of all required assignments. Specifically, the vendor should address the following:

- *The key PRMP roles necessary to support Service Areas deliverables and scope of work.*
- *The nature and extent of PRMP support required in terms of staff roles and percentage of time available.*
- *Assistance from PRMP staff and the experience and qualification levels of required staffing.*

PRMP may not be able or willing to provide the additional support the vendor lists in this part of its Proposal. The vendor therefore should indicate whether its request for additional support is a requirement for its performance. If any part of the list is a requirement, PRMP may reject the vendor's proposal if PRMP is unwilling or unable to meet the requirements.
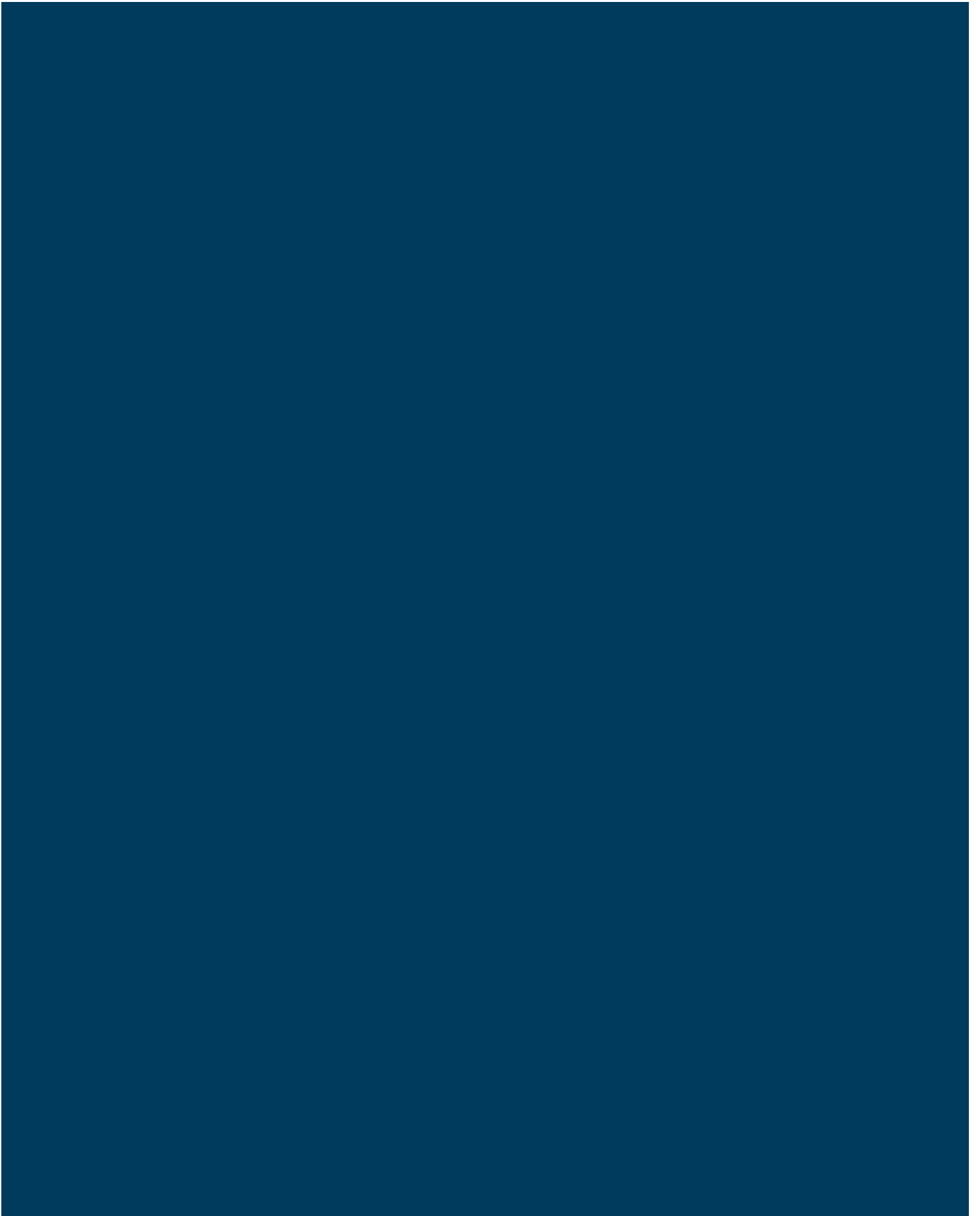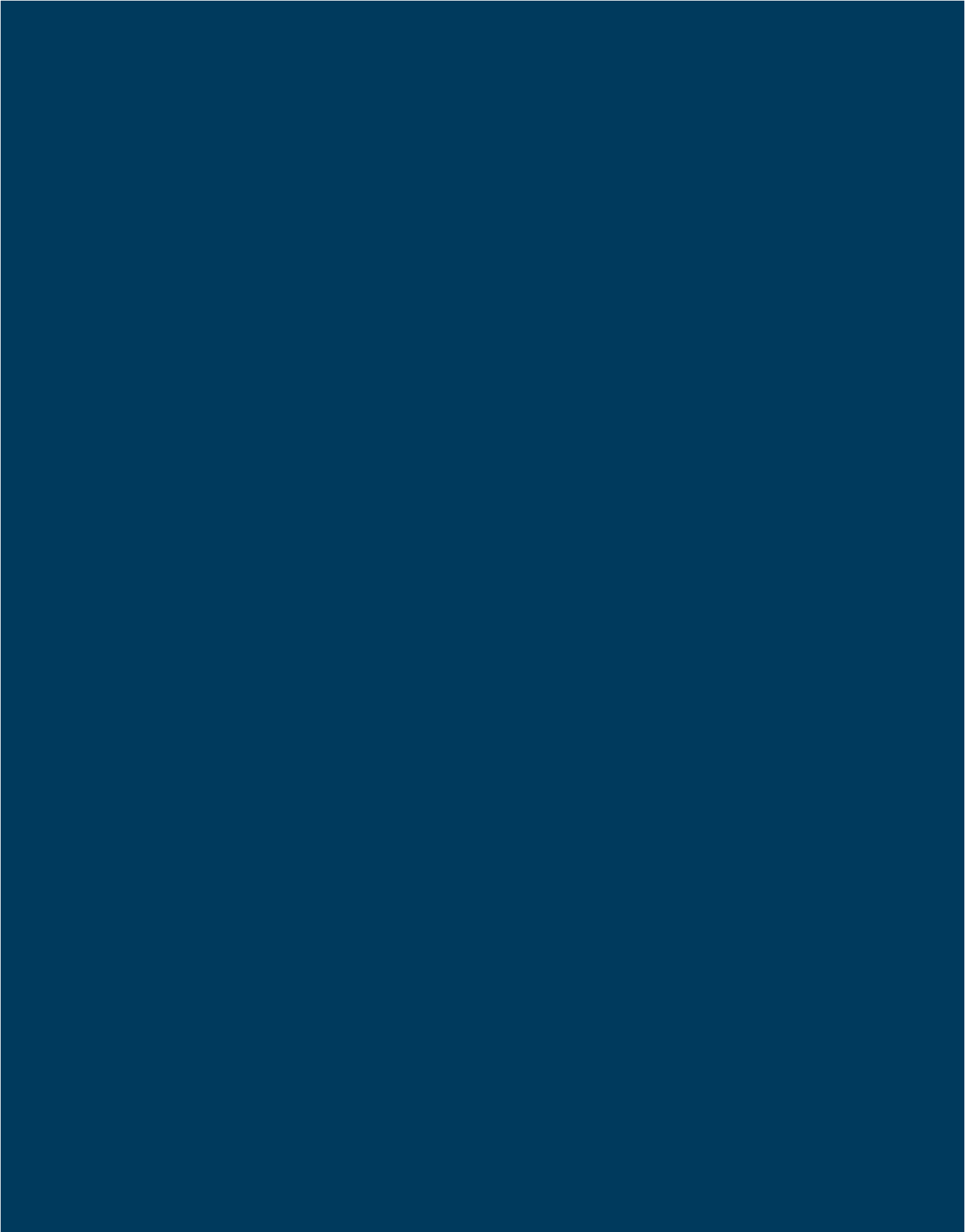
D.3   Key Staff, Resumes, and References

Key staff consist of the vendor's core team for the Service Areas. These resources are responsible for providing leadership and creating the standards and processes required for the various assignments the EOMC Vendor will help support. Resumes for key staff named in the vendor proposal should indicate the staff's role and demonstrate how each staff member's experience and qualifications will contribute to this contract's success.

Due to the nature of the work, PRMP is requesting a scaled staffing approach so that EOMC staffing levels can easily flex in accordance with short and long-term assignments needs. In compiling the initial staffing plan Respondents will need to plan for supporting PRMP's efforts; accordingly, PRMP has bifurcated the two staffing groups and has identified example roles which at a minimum will be required to ensure ongoing assignments success. See below:

Key EOMC Staff

- *Account Manager*
- *Lead Program Manager*
- *Business Lead/Subject Matter Experts (SMEs)*
- *Business Analyst(s)*

Variable EOMC Staff

- *Business Leads*
- *Program Manager*
- *Business Analyst(s)*

The EOMC Vendor must staff each assignment with at least one (1) resource who must be fluent in both Spanish and English. Additional qualifications, experience, and responsibilities for each key staff role are defined in Appendix 2: Staff Qualifications, Experience, and Responsibilities.

D.3.1   Resumes

PRMP considers the staff resumes (especially key staff) as a key indicator of the vendor's understanding of the skill sets required for each staffing area and their ability to perform them. The vendor should complete the table below and include resumes of all the individuals who are being initially proposed. Each resume must not exceed three (3) pages and must demonstrate experience relevant to the position proposed. If applicable, resumes should include work on assignments cited under the vendor's corporate experience, and the specific functions performed on such service areas. Copies of diplomas, licenses, and credentials are encouraged but are not required, and are not subject to the 3-page limit. Clearly identify which of the staff listed are designated as key staff.
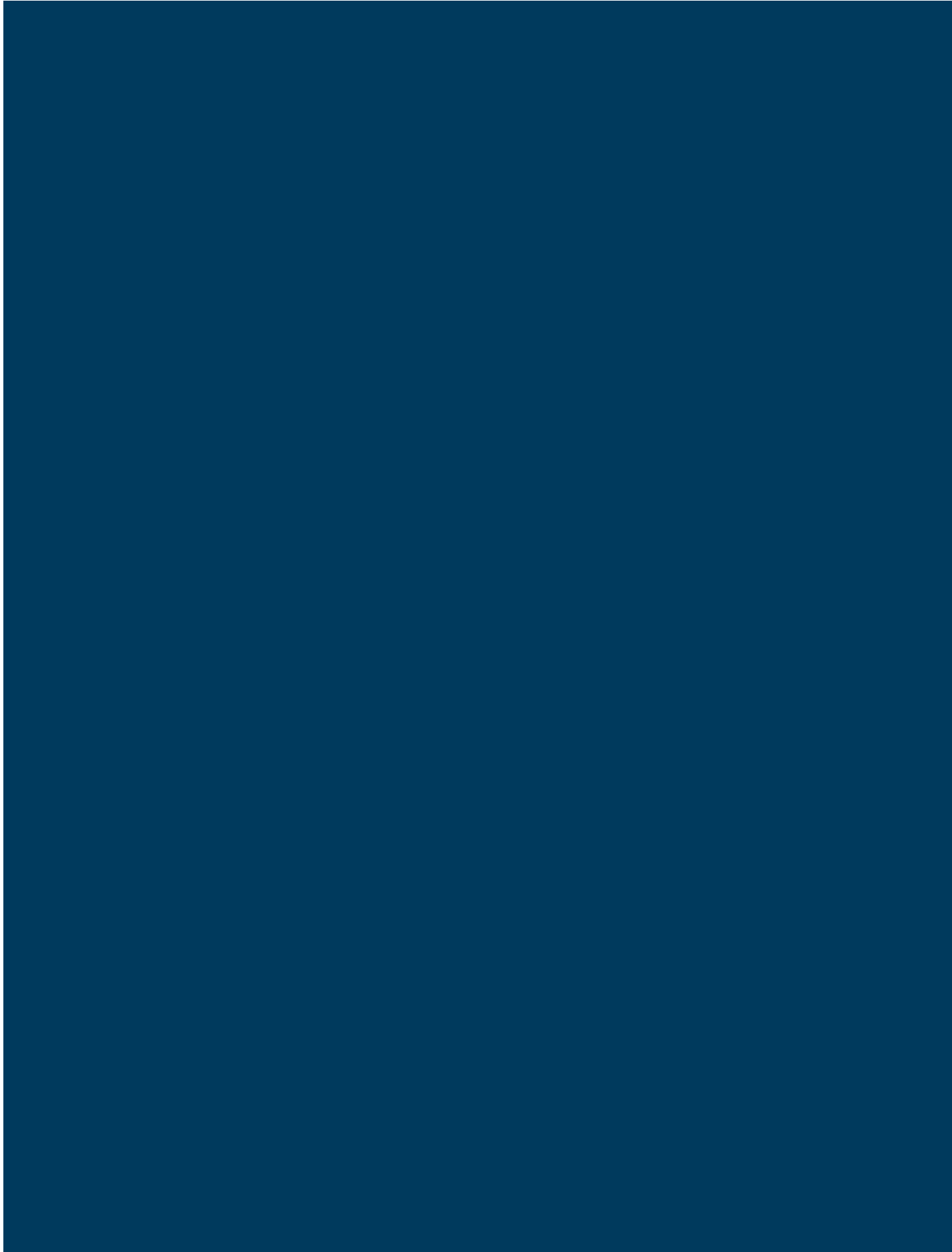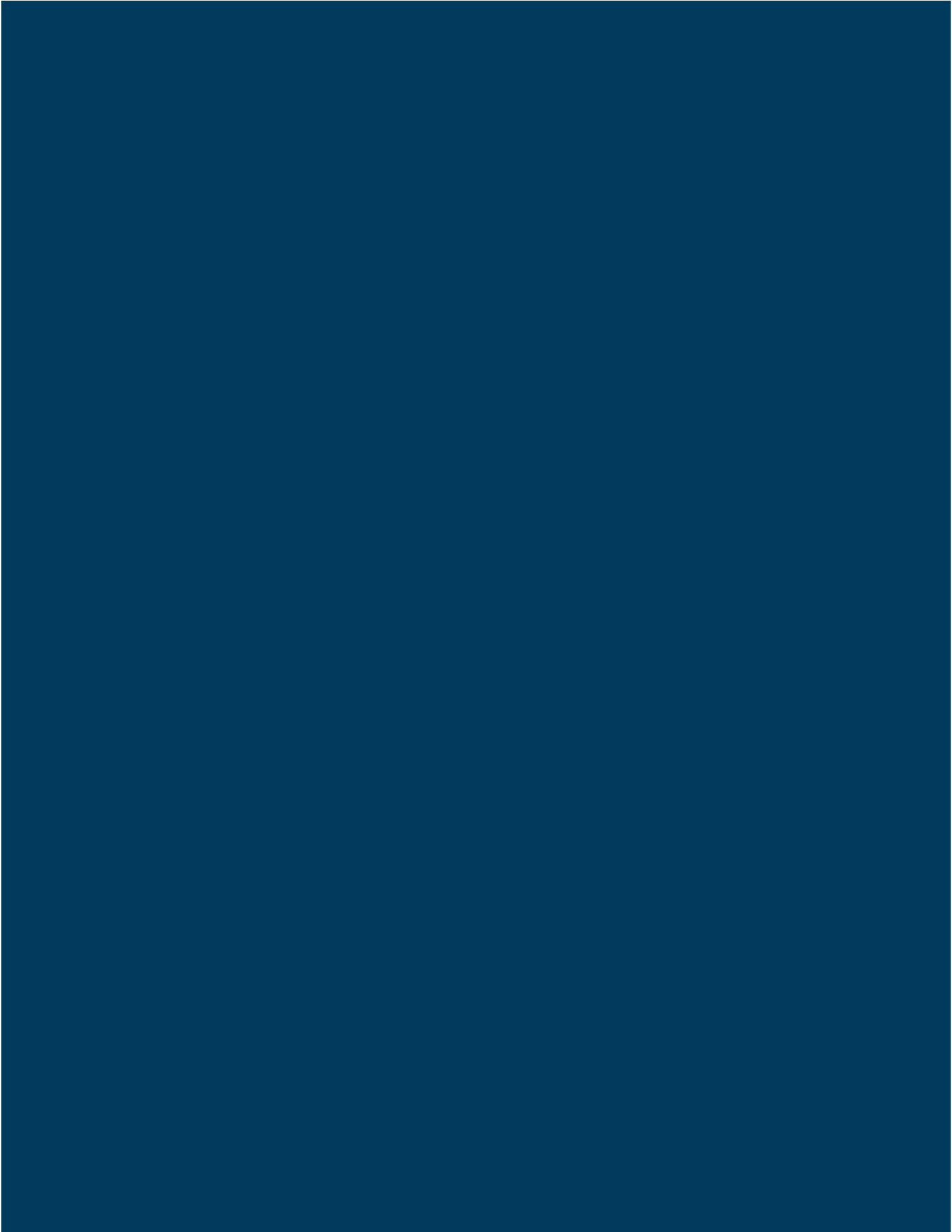
D.3.2   Key Staff References

The vendor should provide a minimum of one (1) reference for each proposed key staff. The reference should be able to confirm that the staff has successfully demonstrated performing tasks commensurate to the tasks they will perform for the assignments in each Service Areas.

The name of the person to be contacted, phone number, client name, address, a brief description of work, and date (month and year) of employment should be given for each reference. These references should be able to attest to the candidate's specific qualifications. The reference given should be a person within a client's organization and not a co-worker or a contact within the vendor's organization. PRMP may contact one or more of the references given and the reference should be aware that PRMP may contact them for this purpose.

Vendors should use the format provided in the table below. Please repeat the rows and tables as necessary.
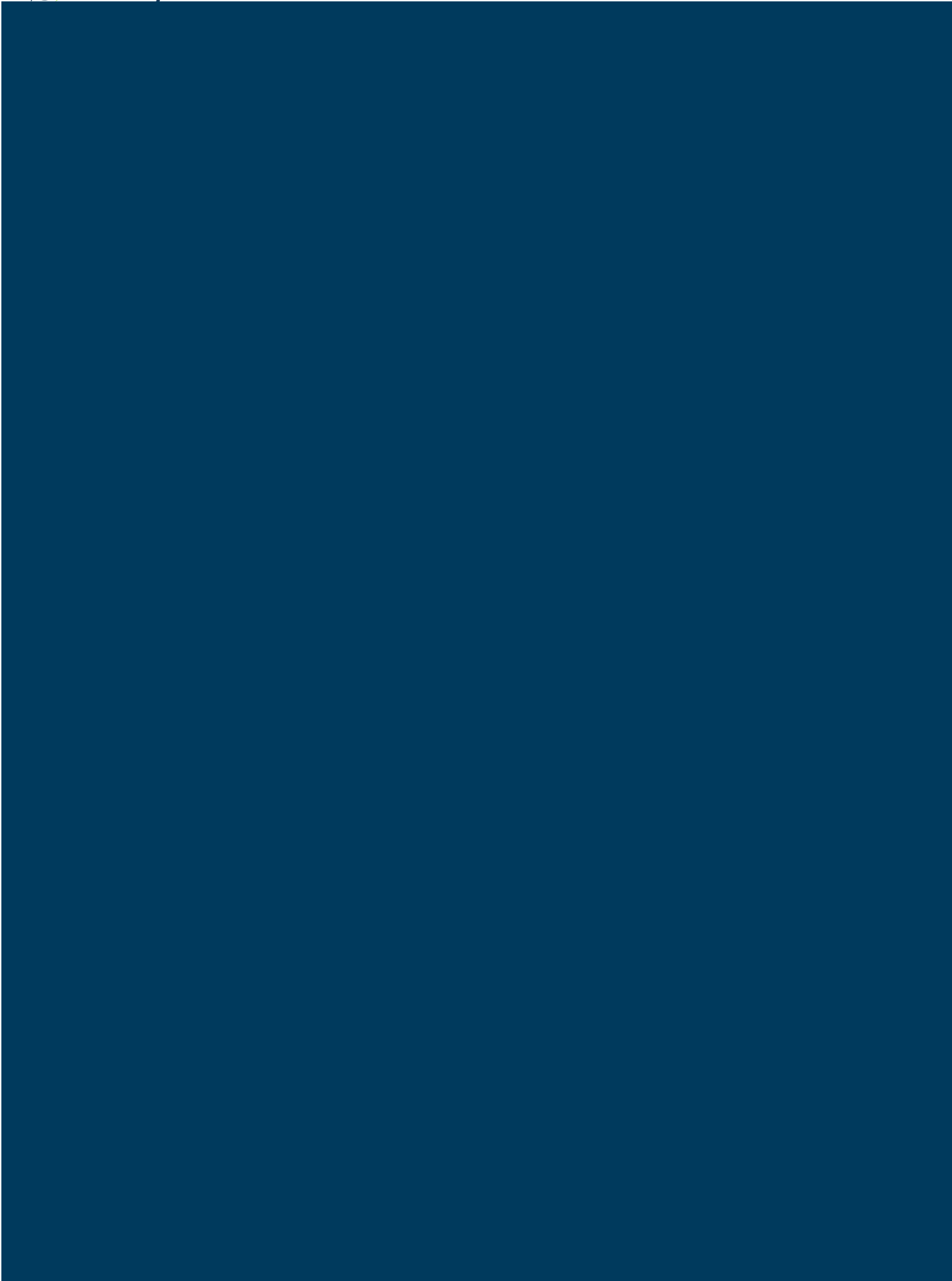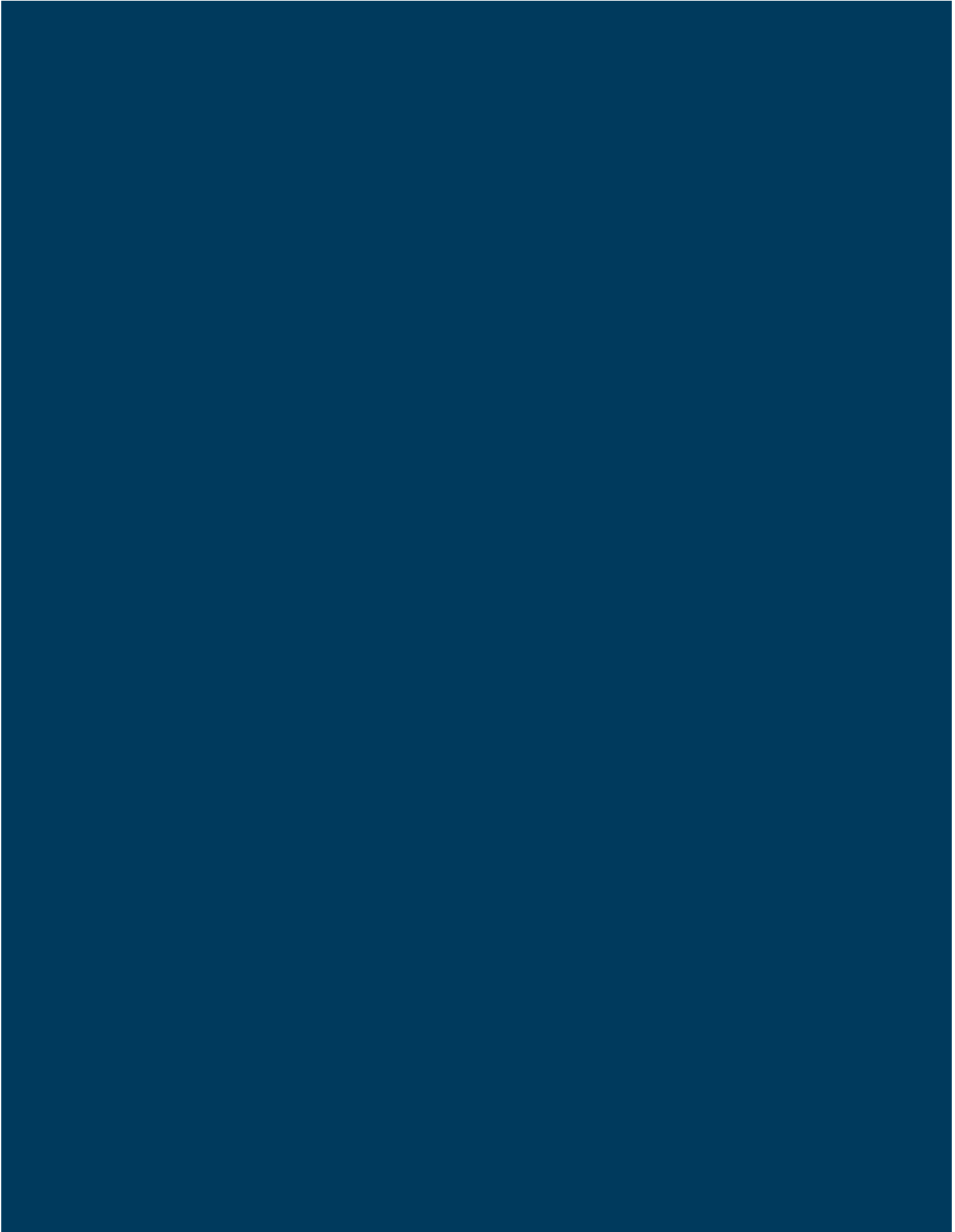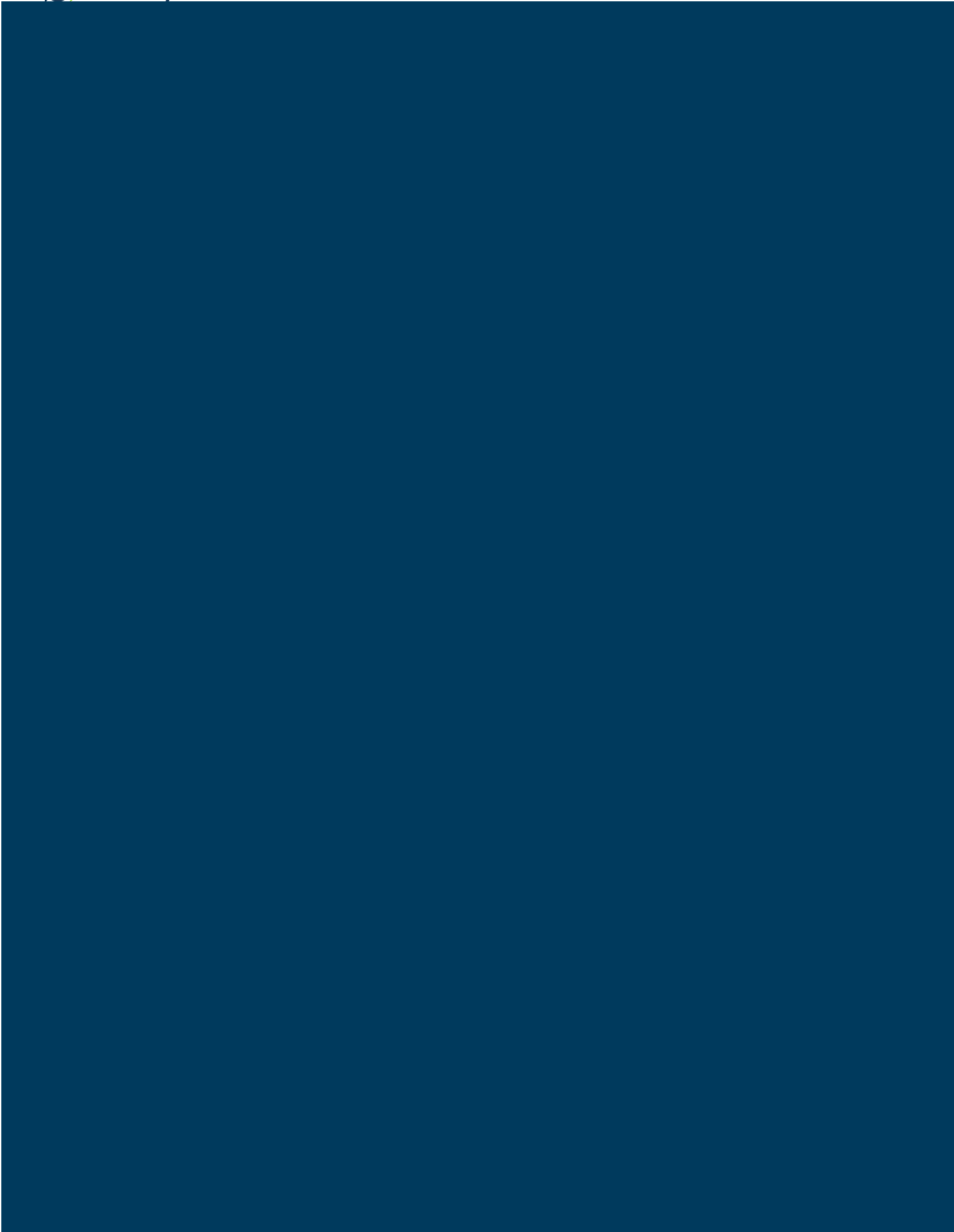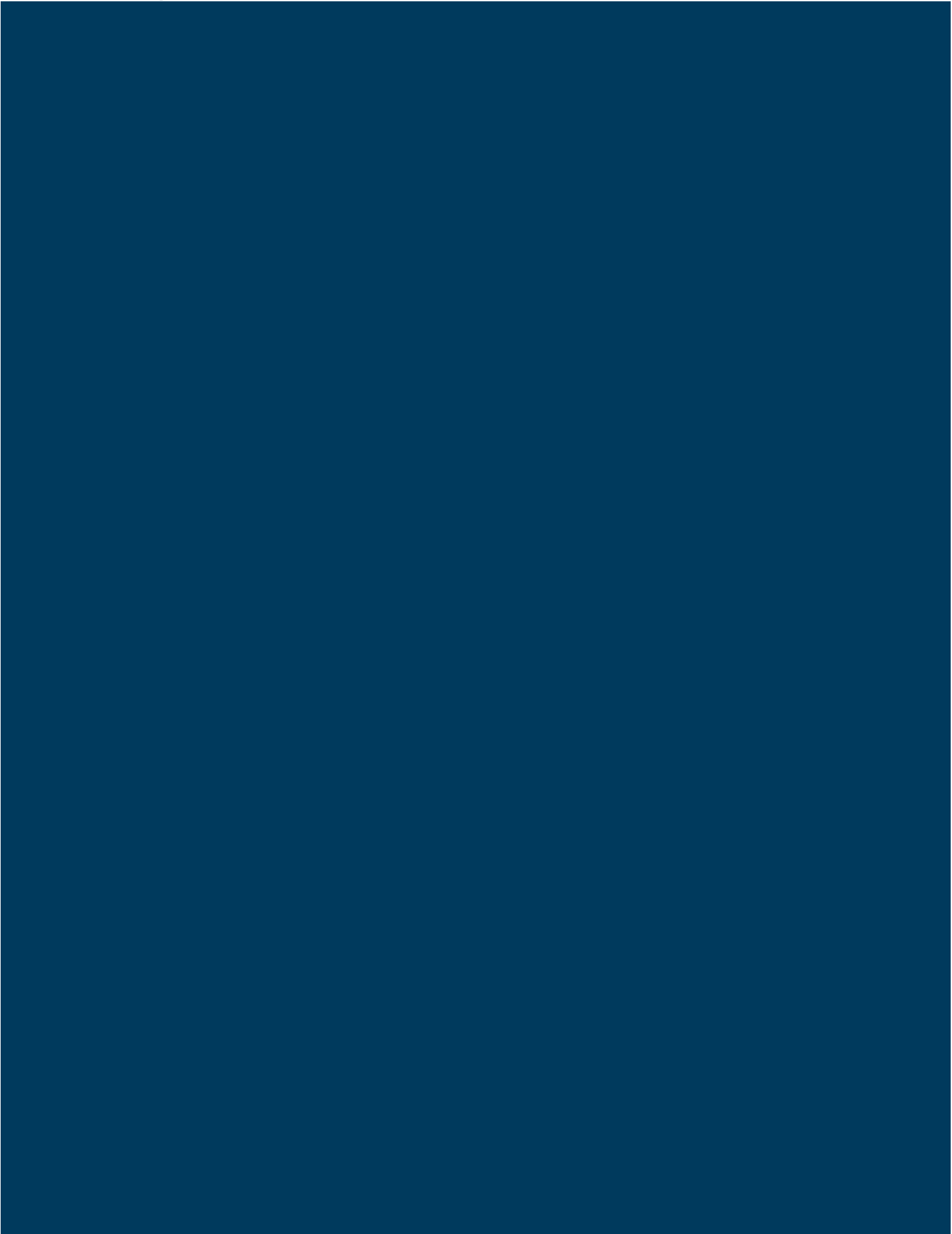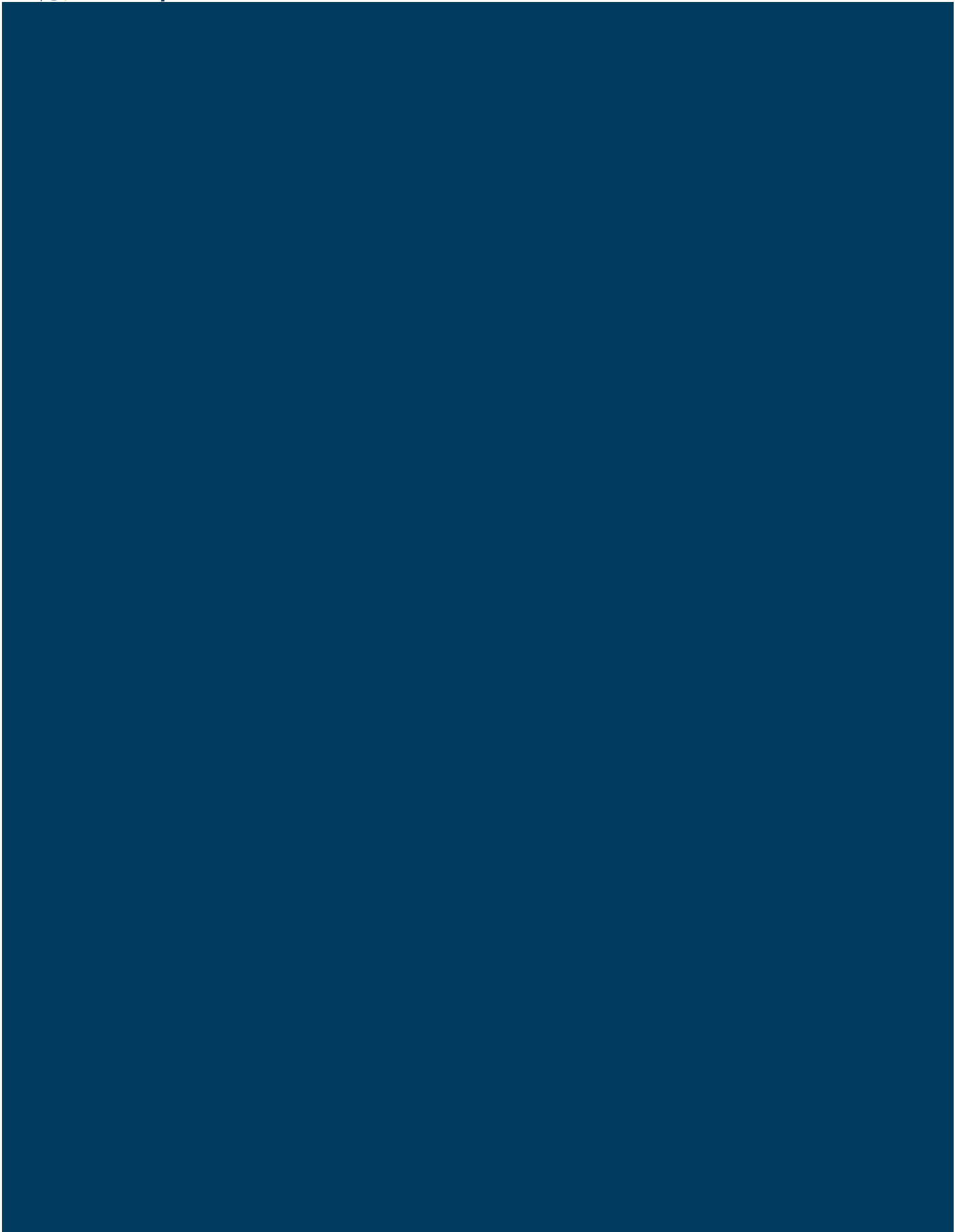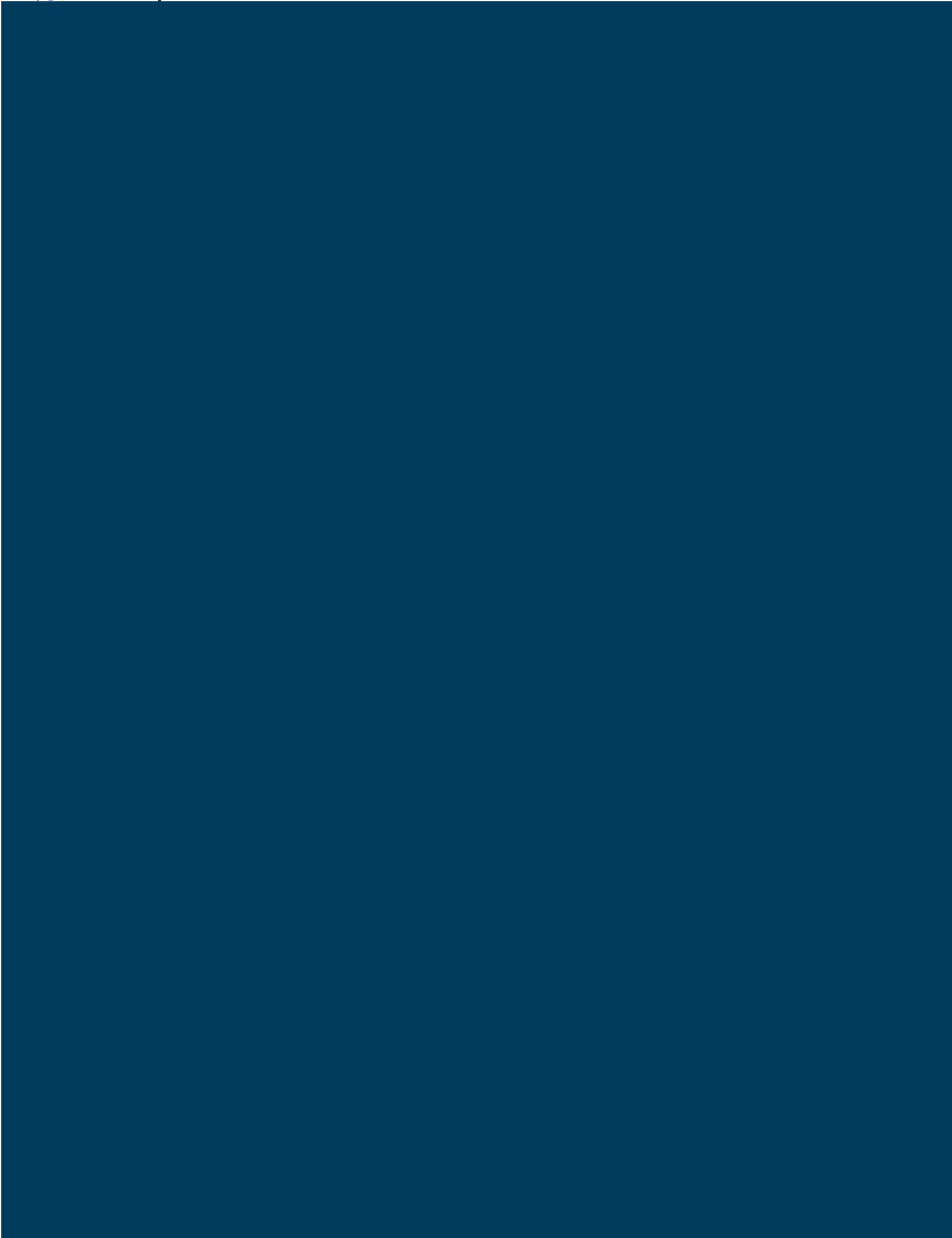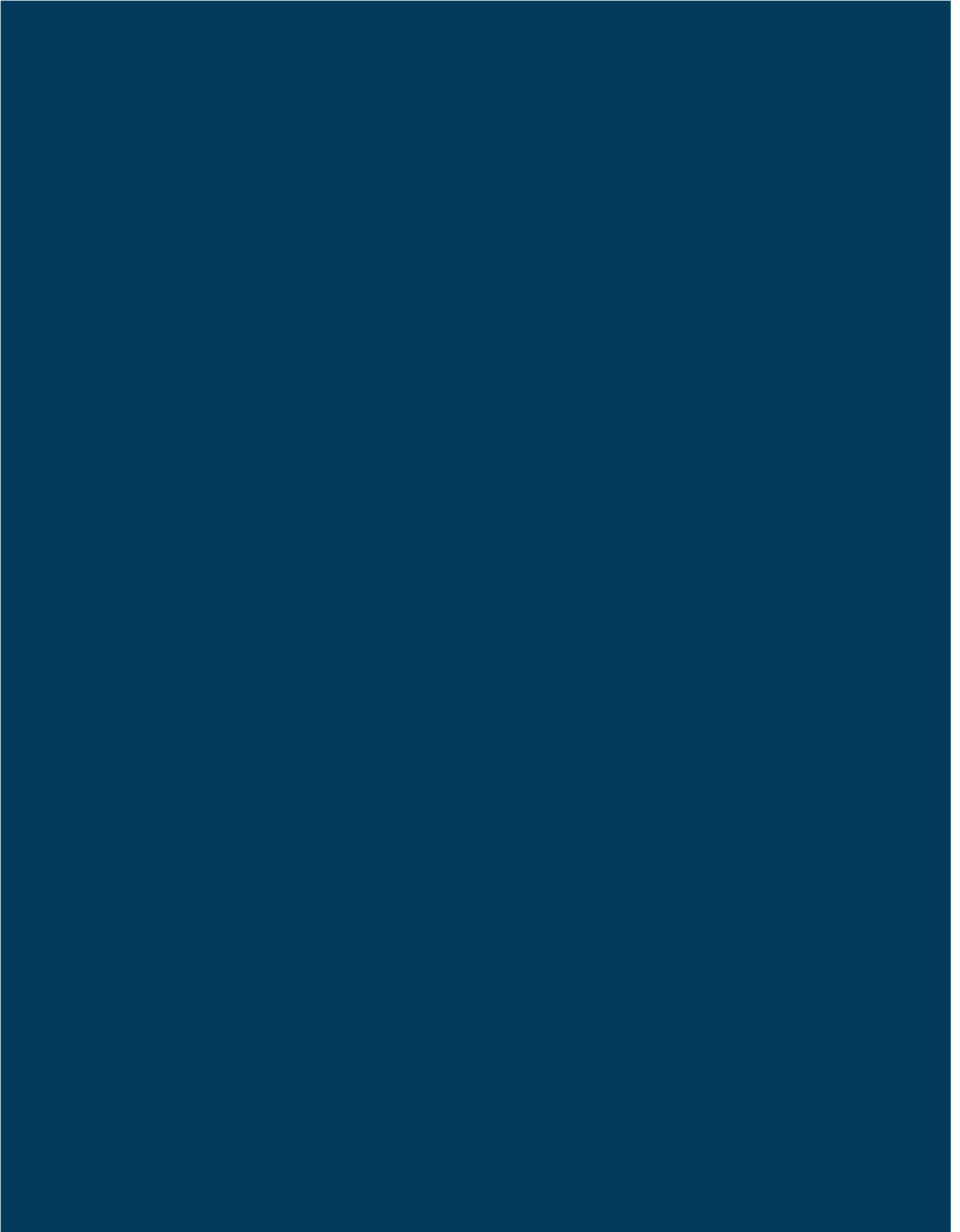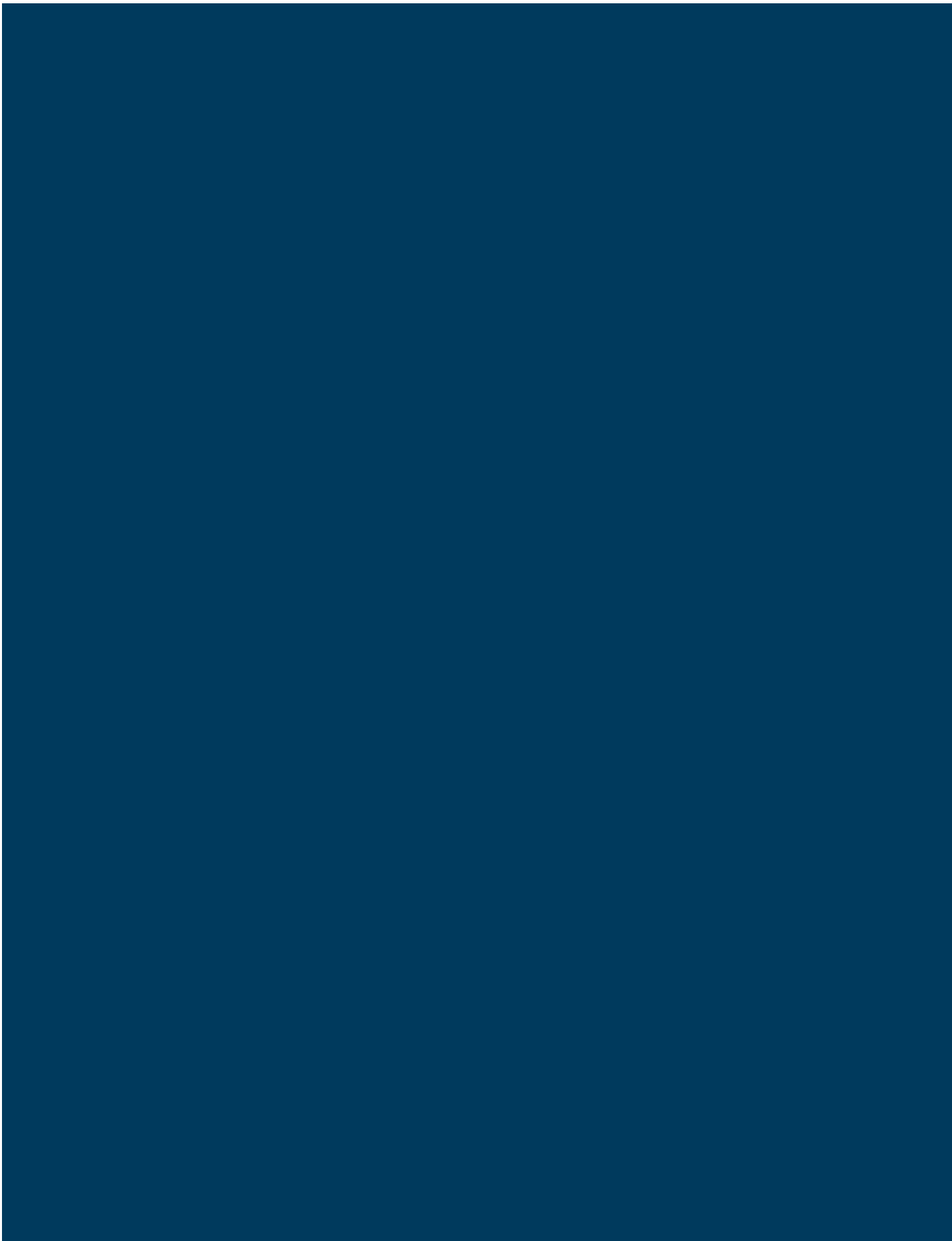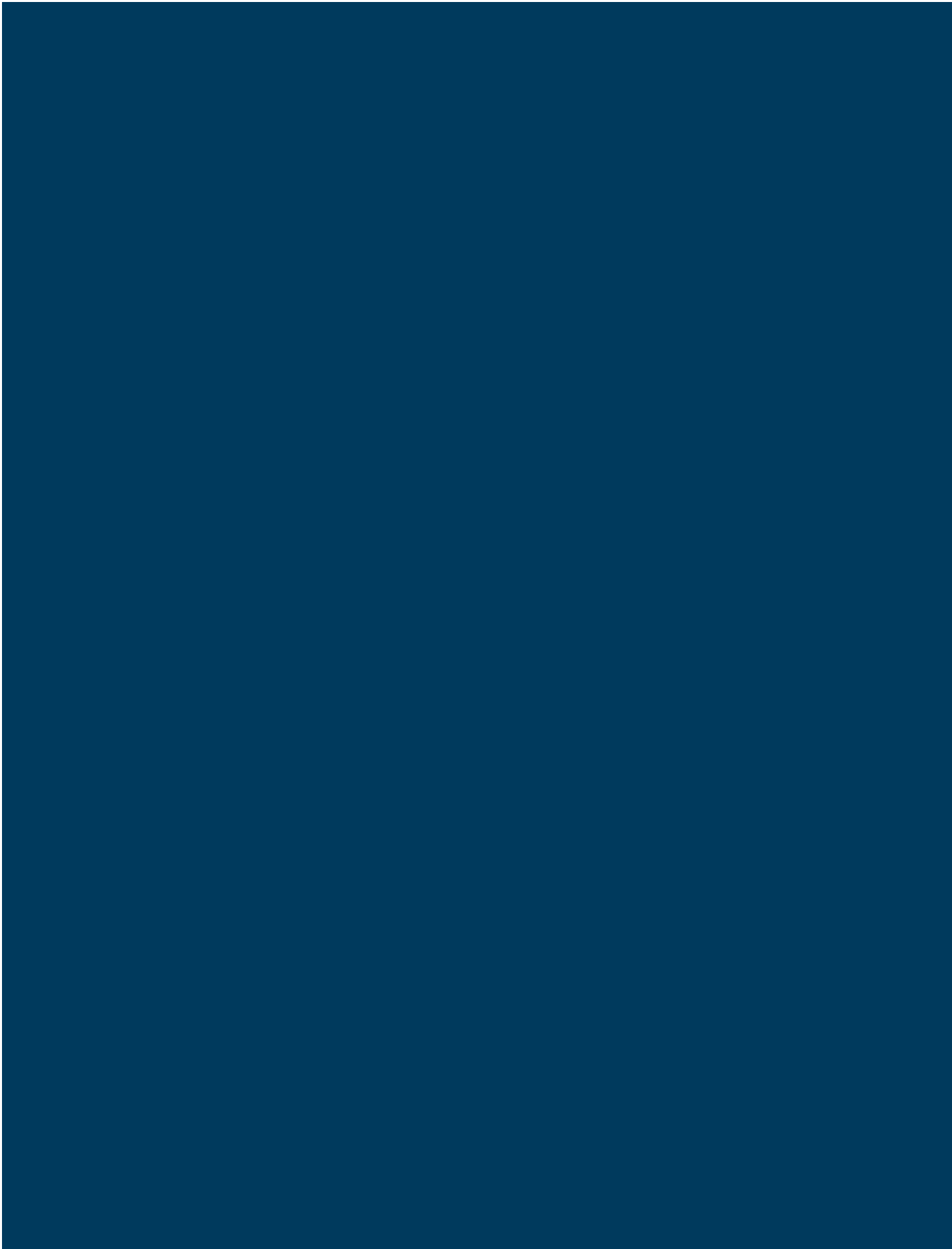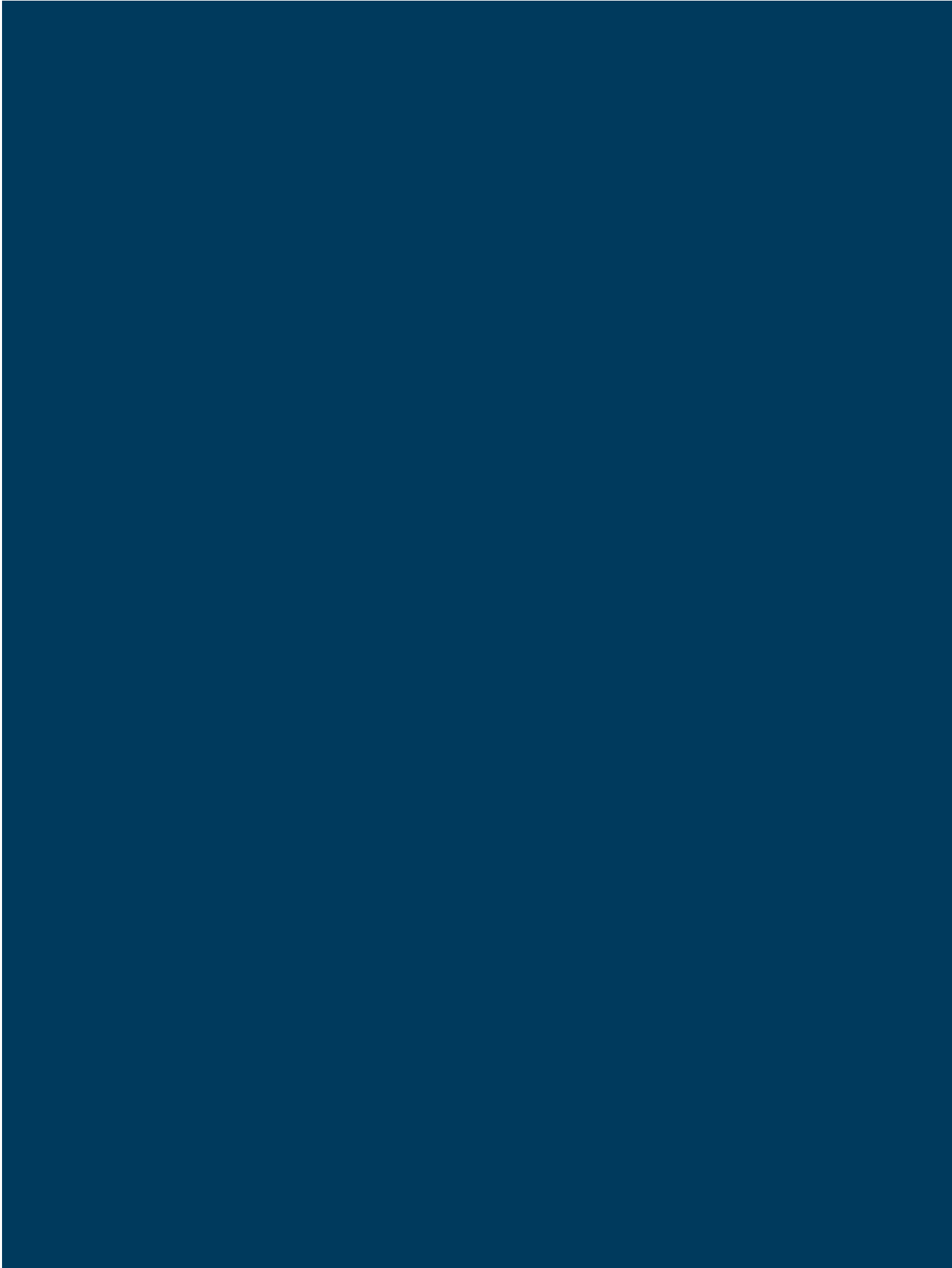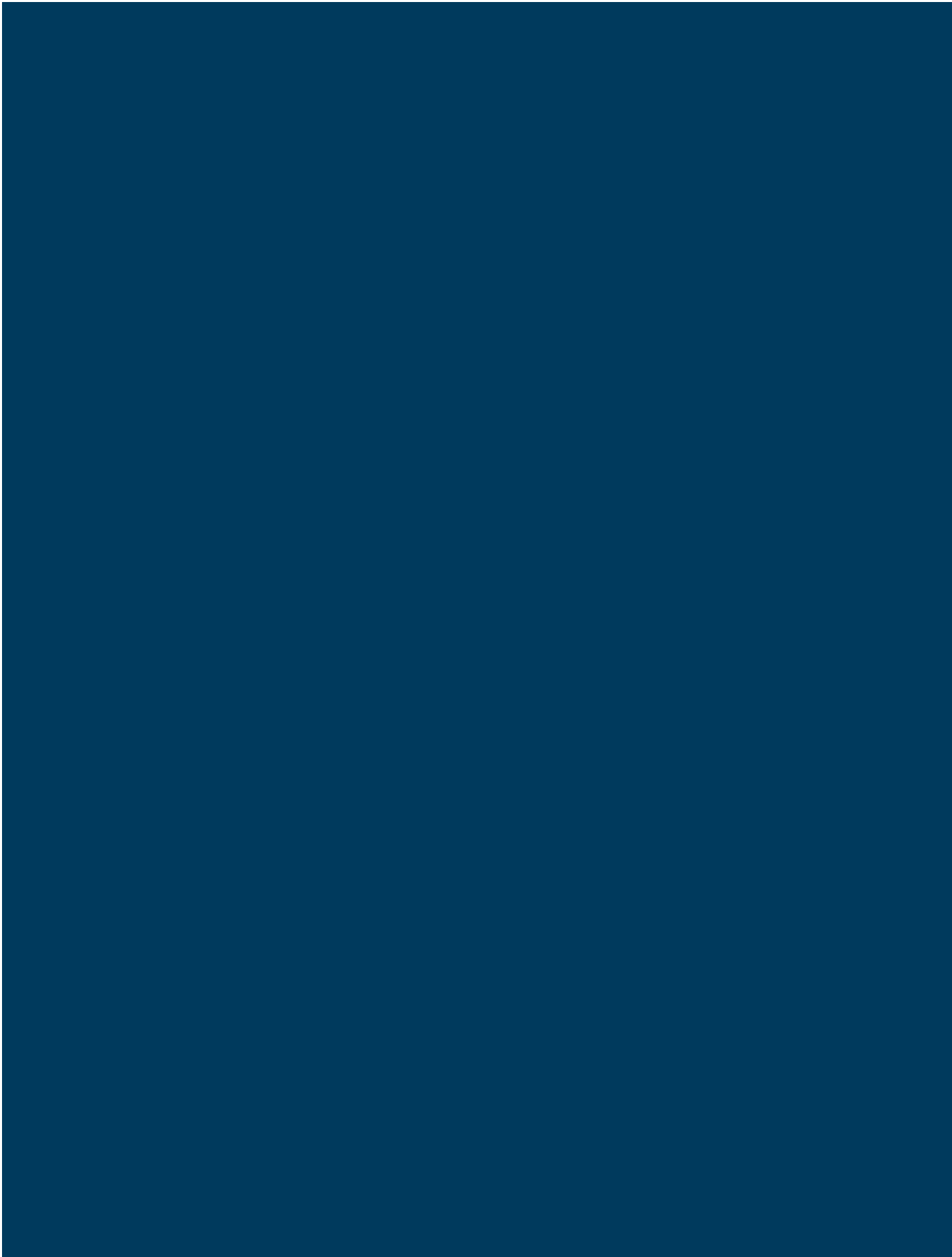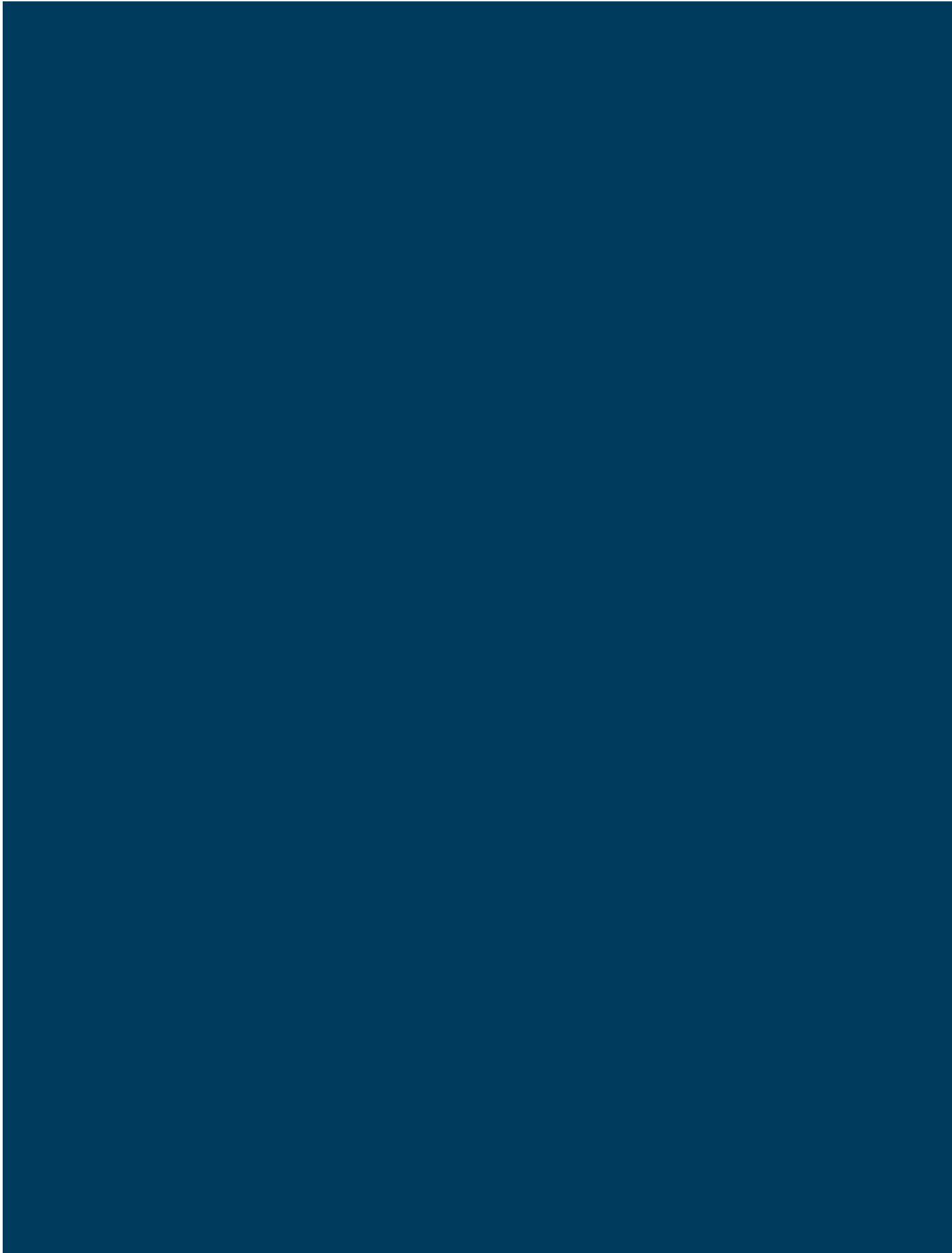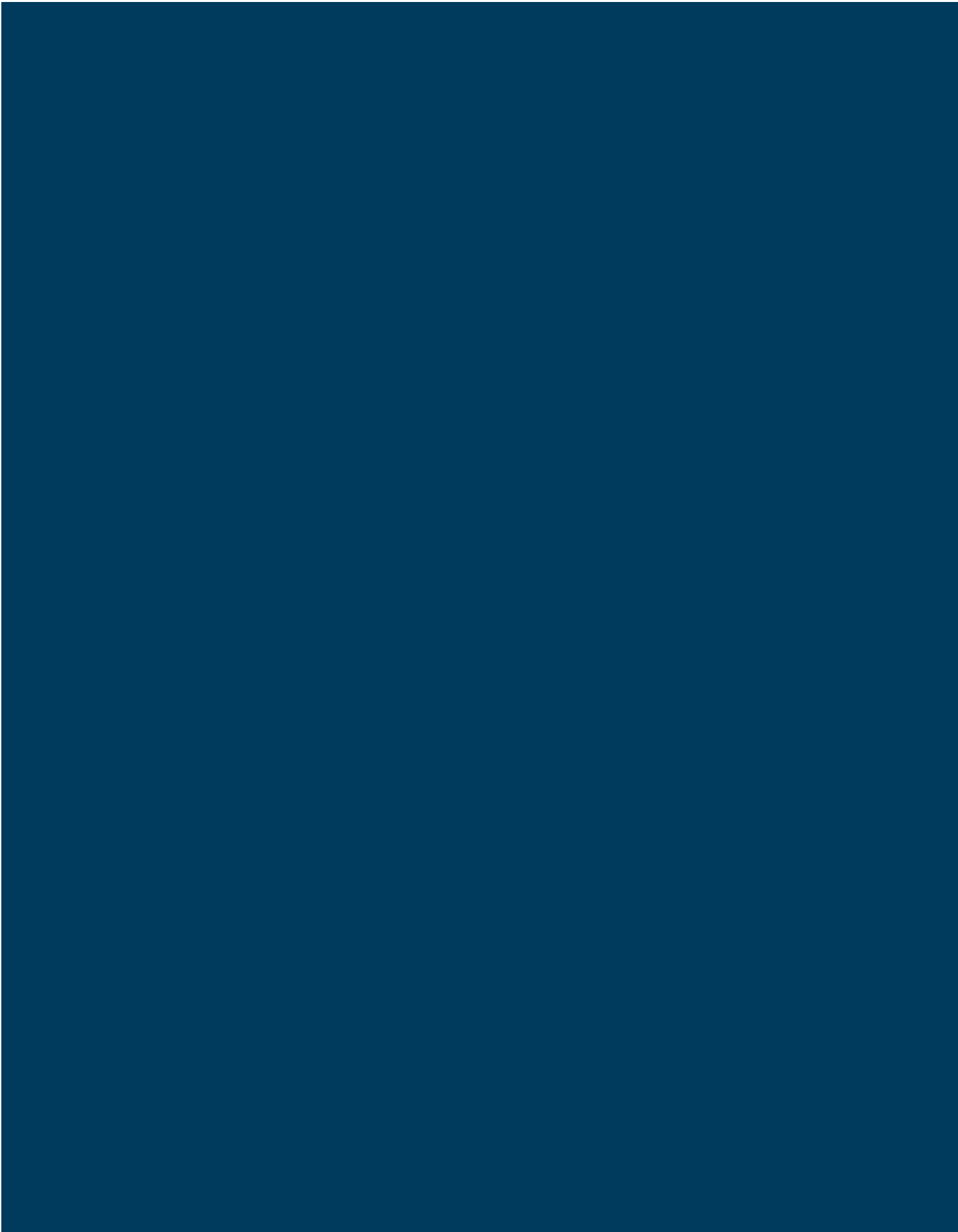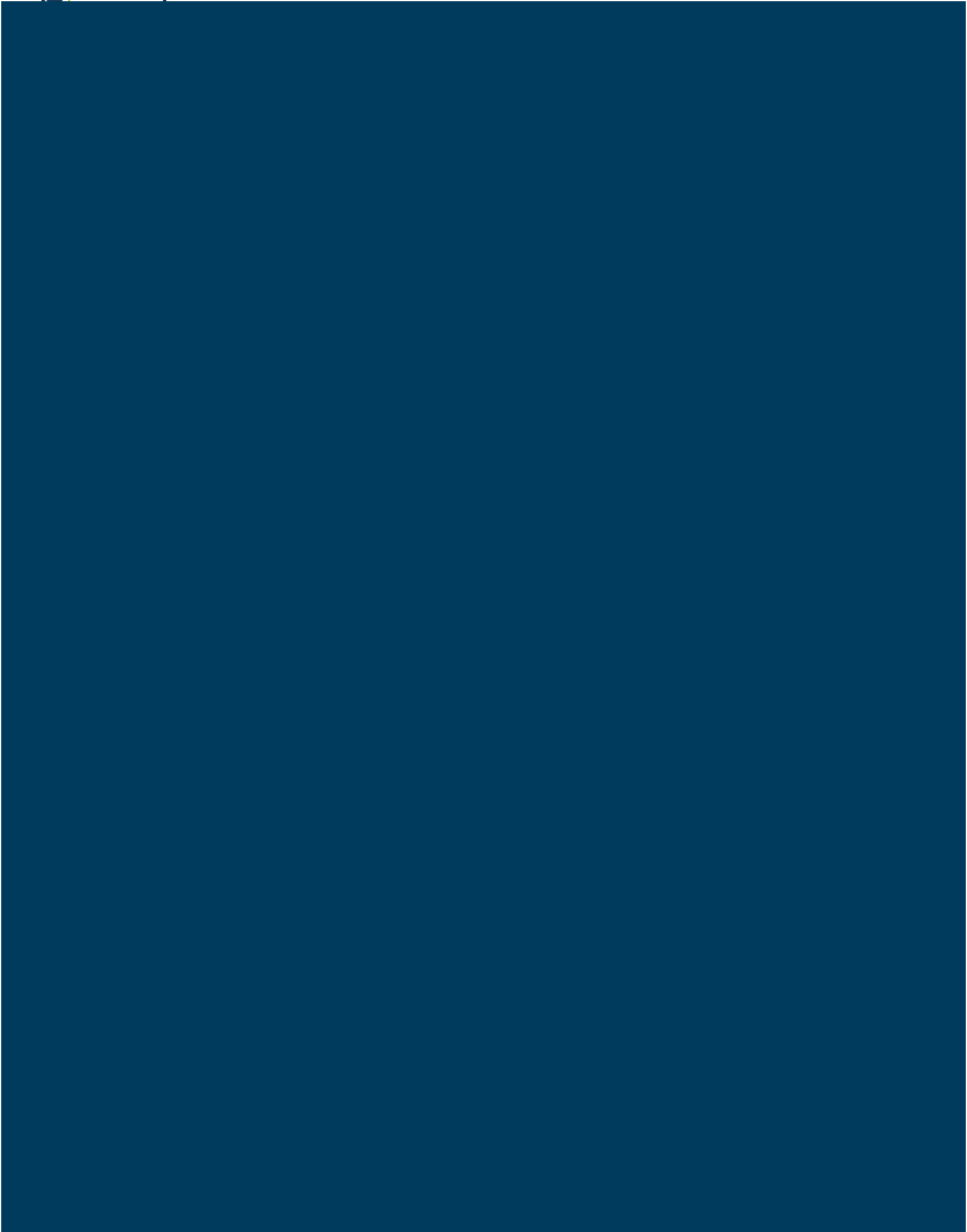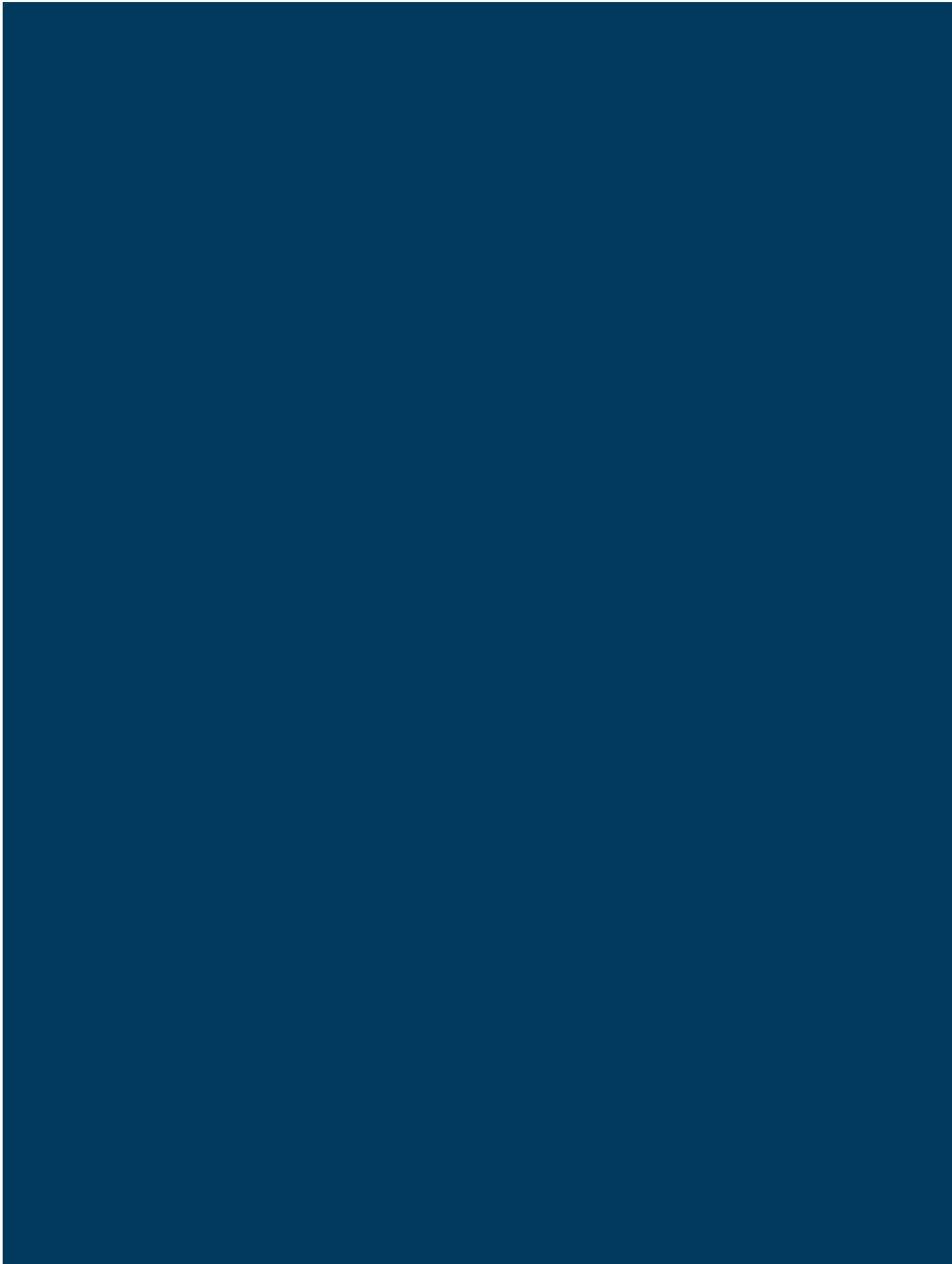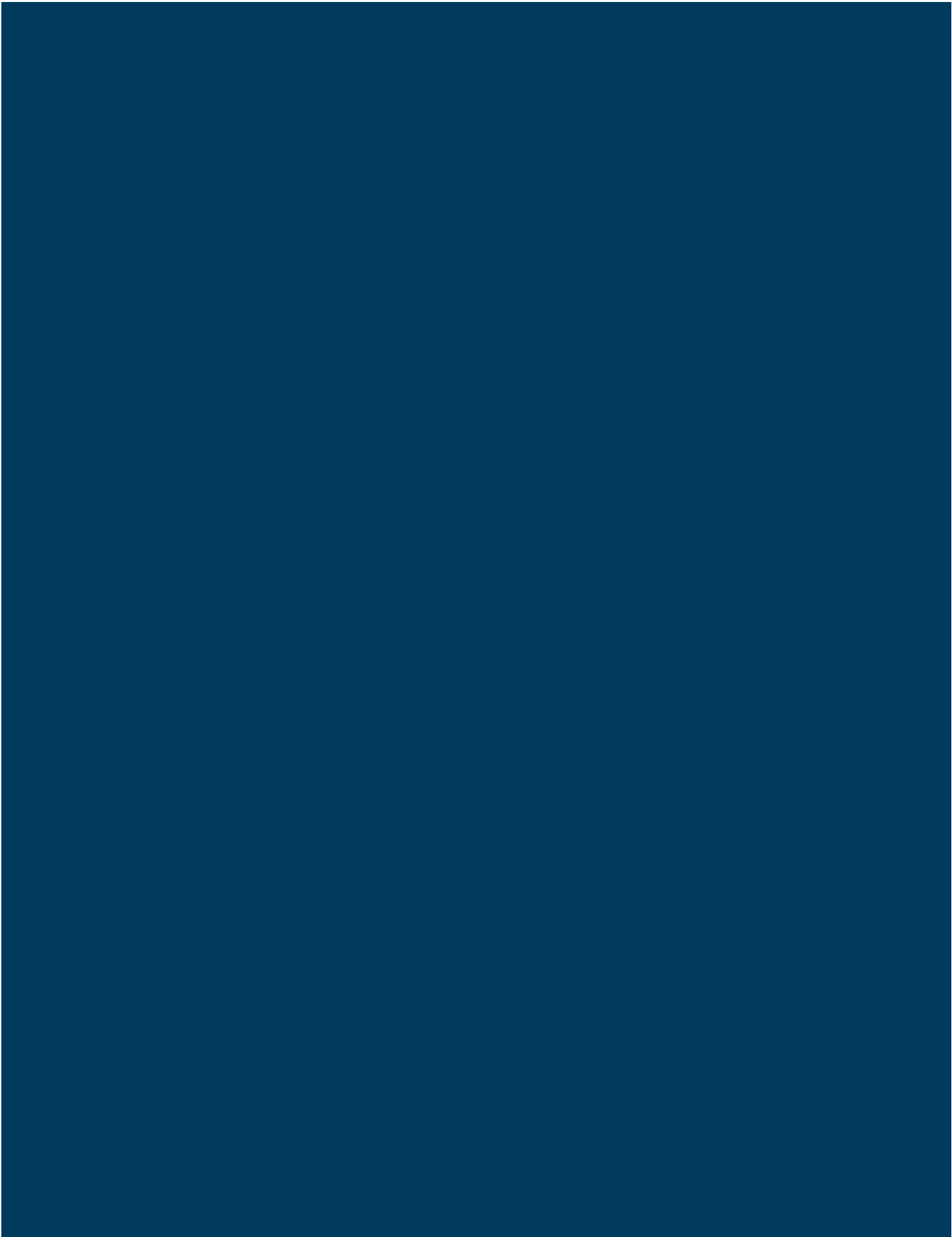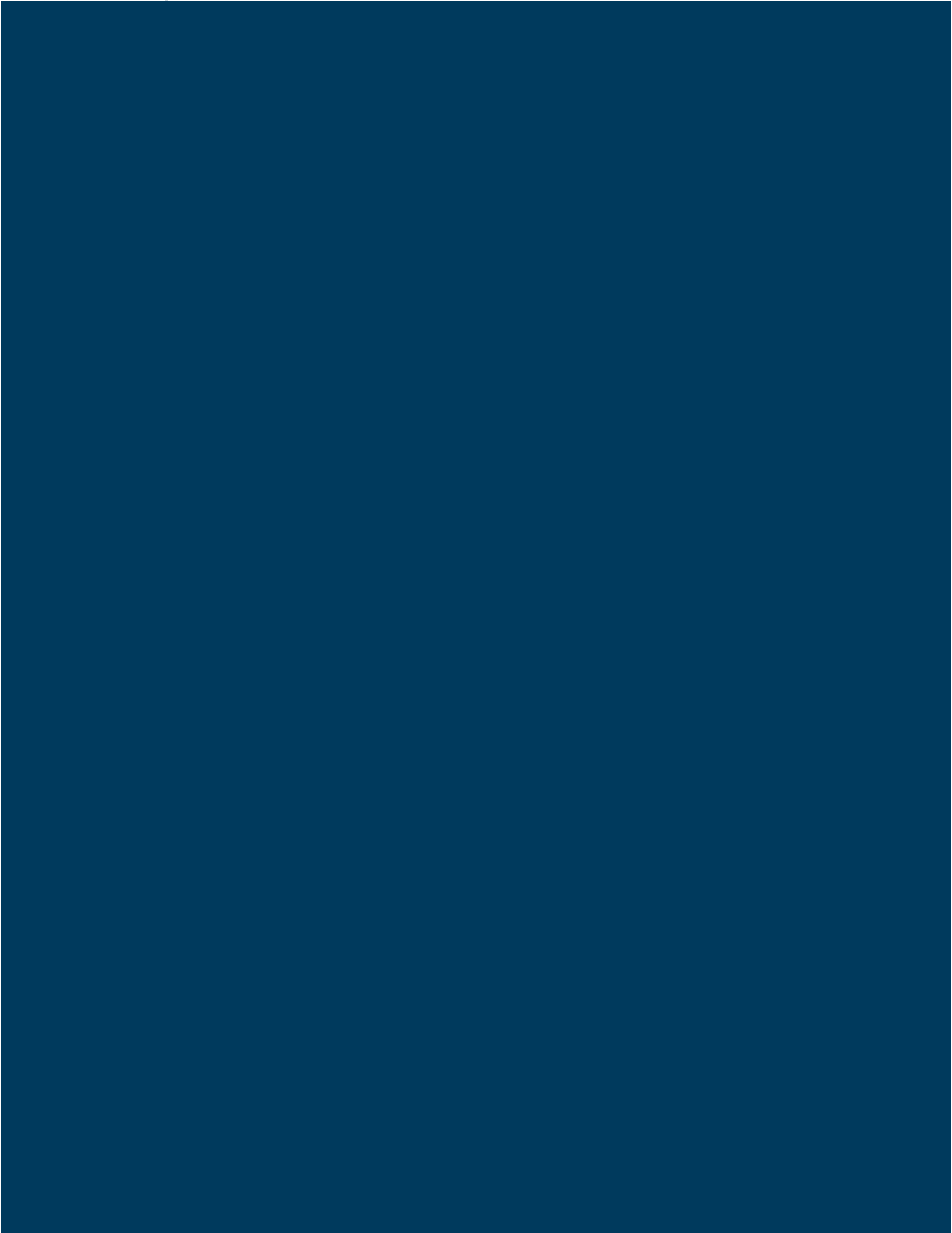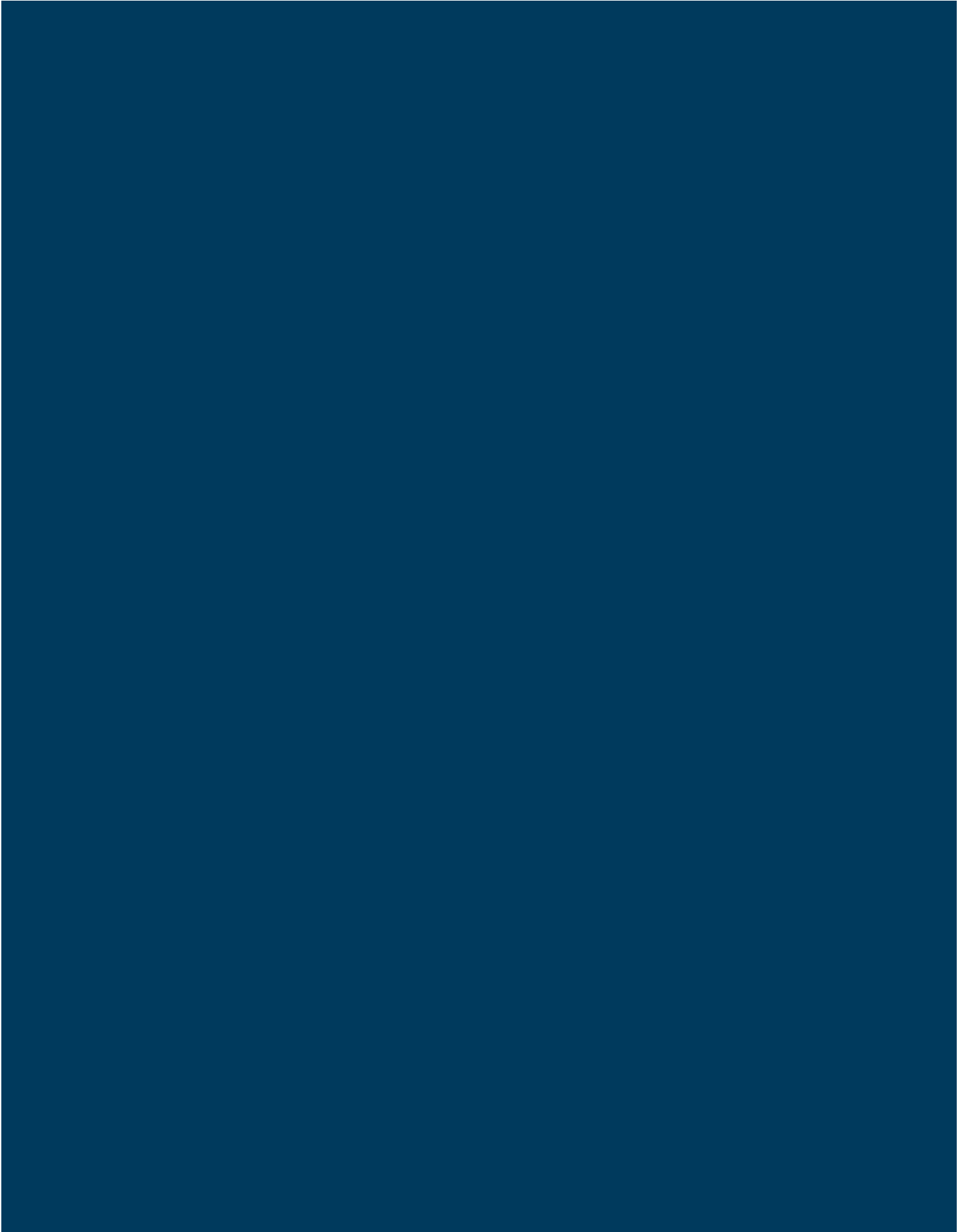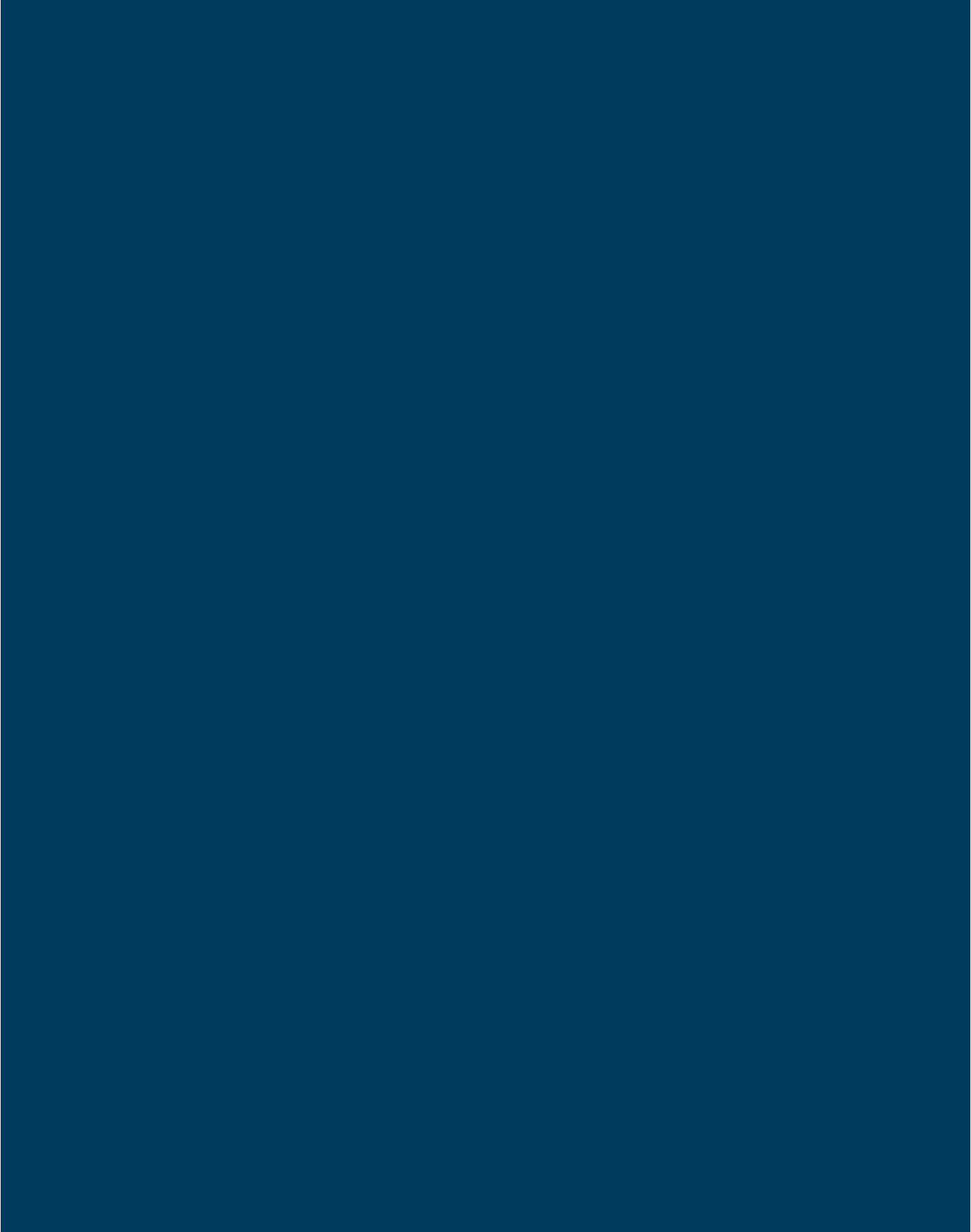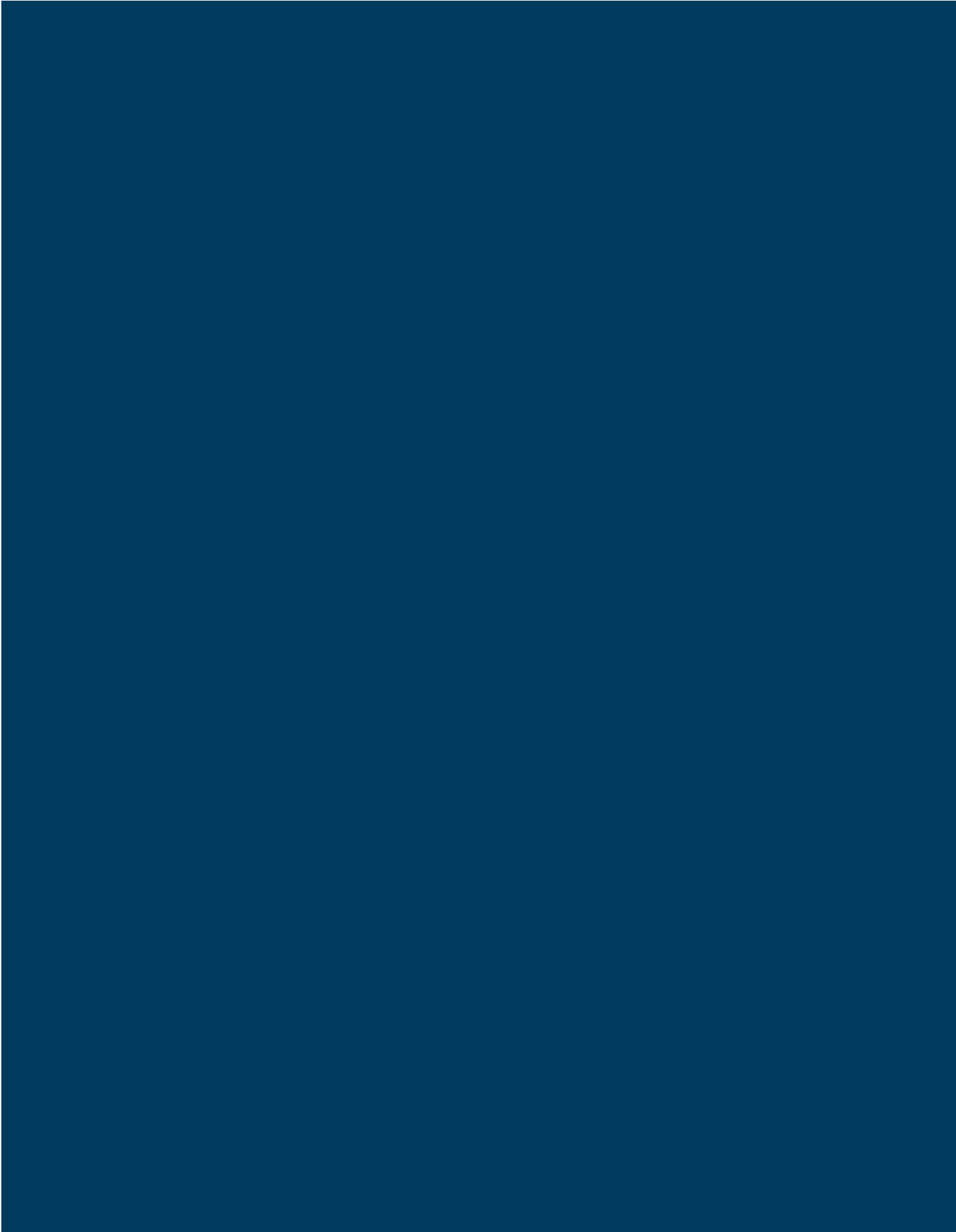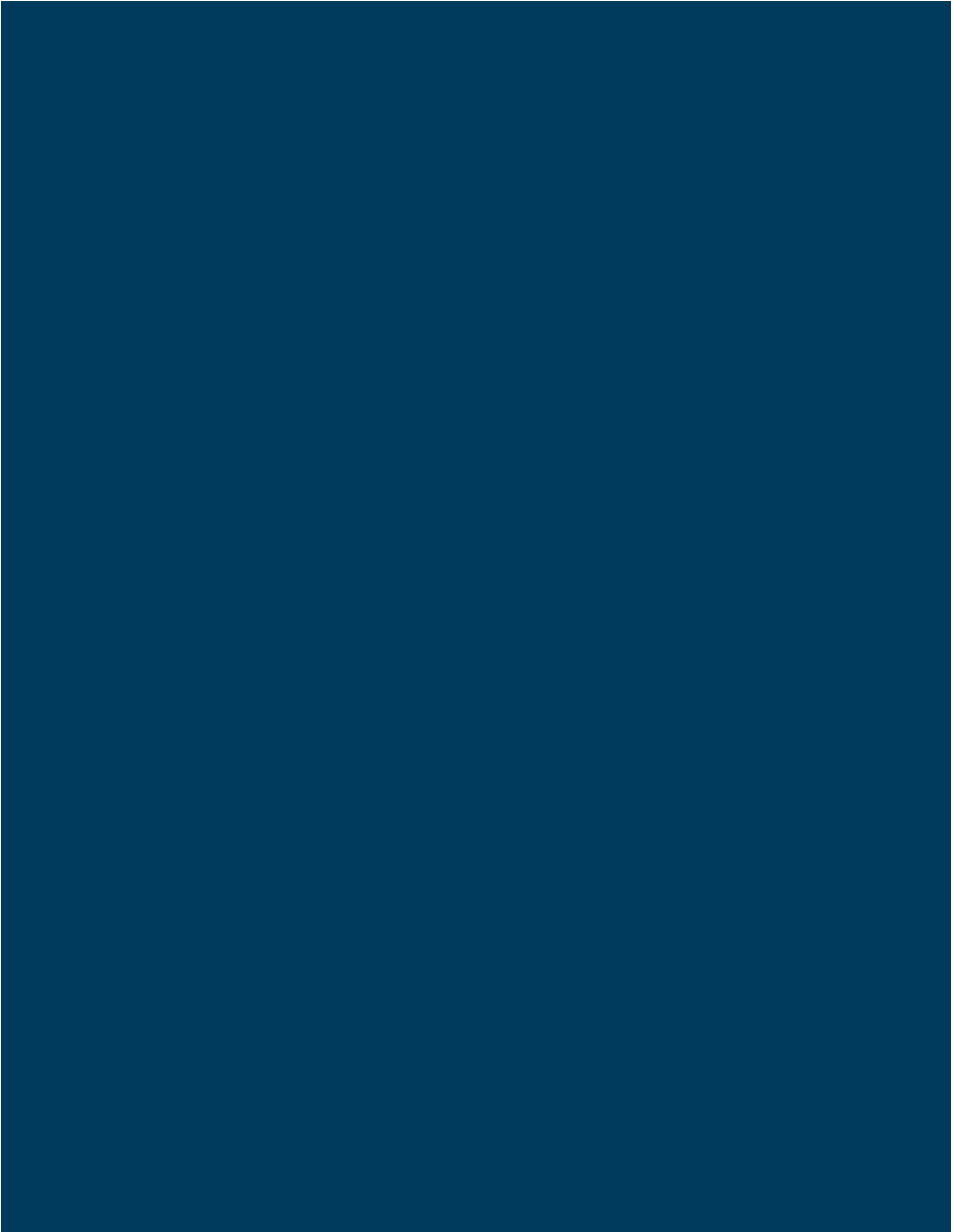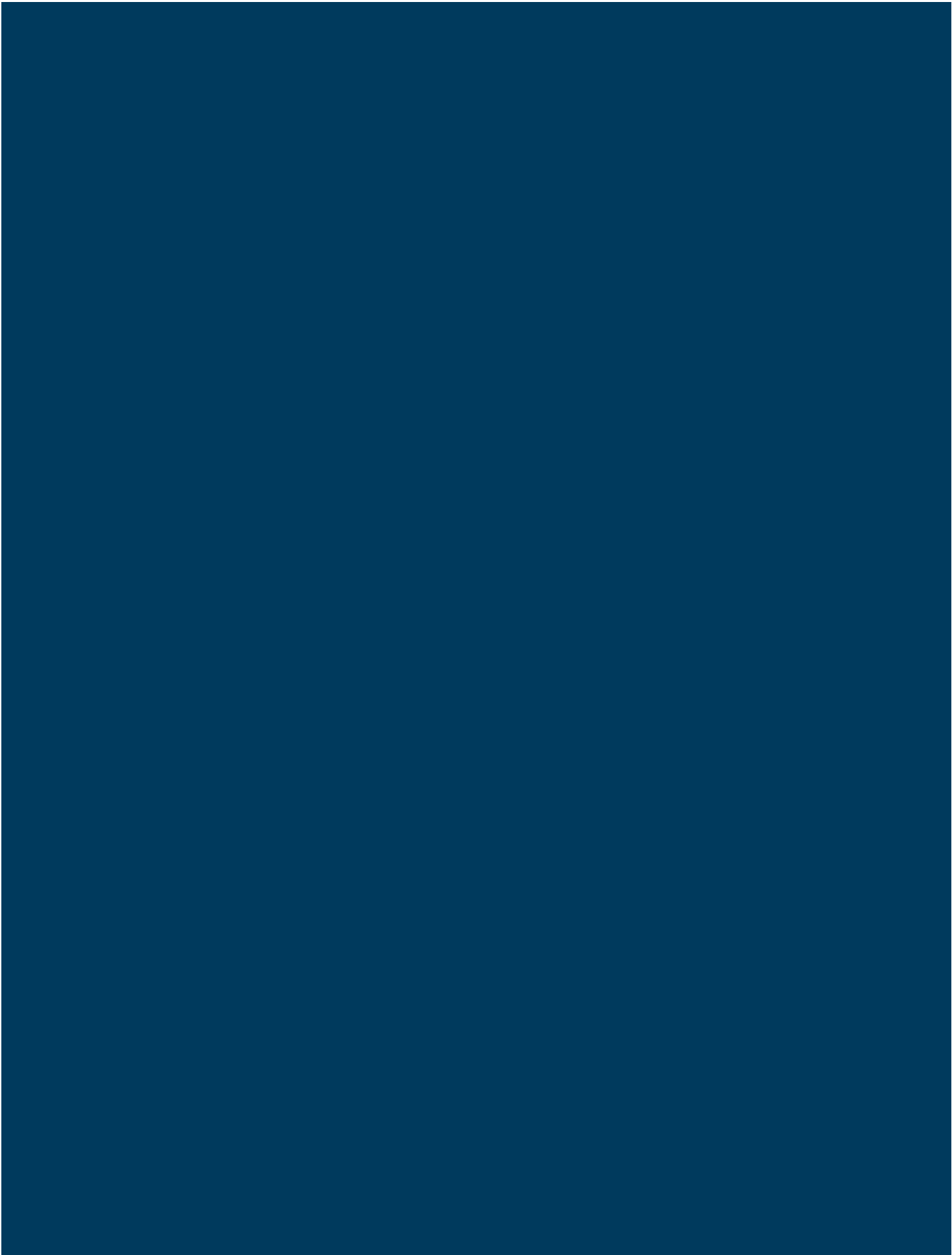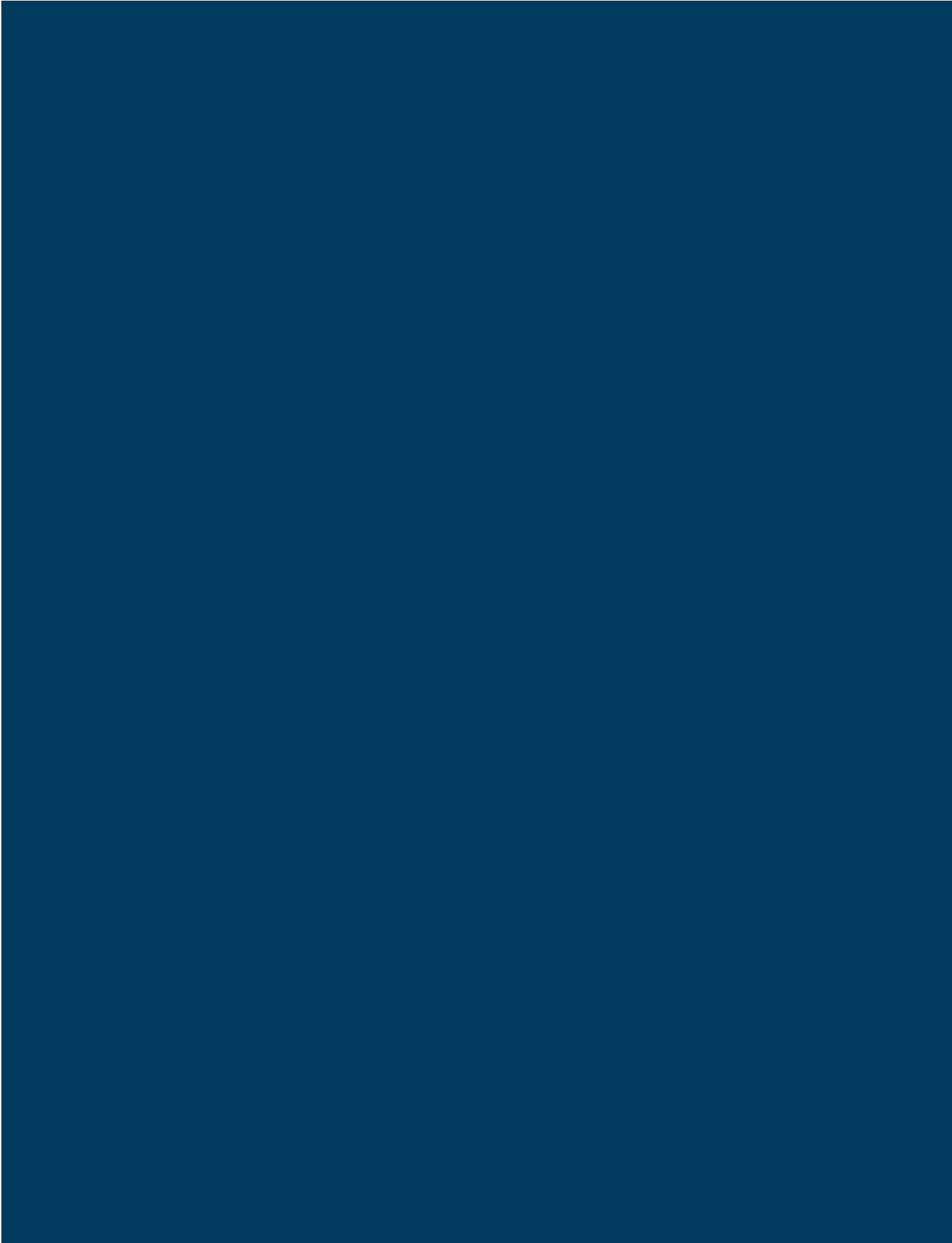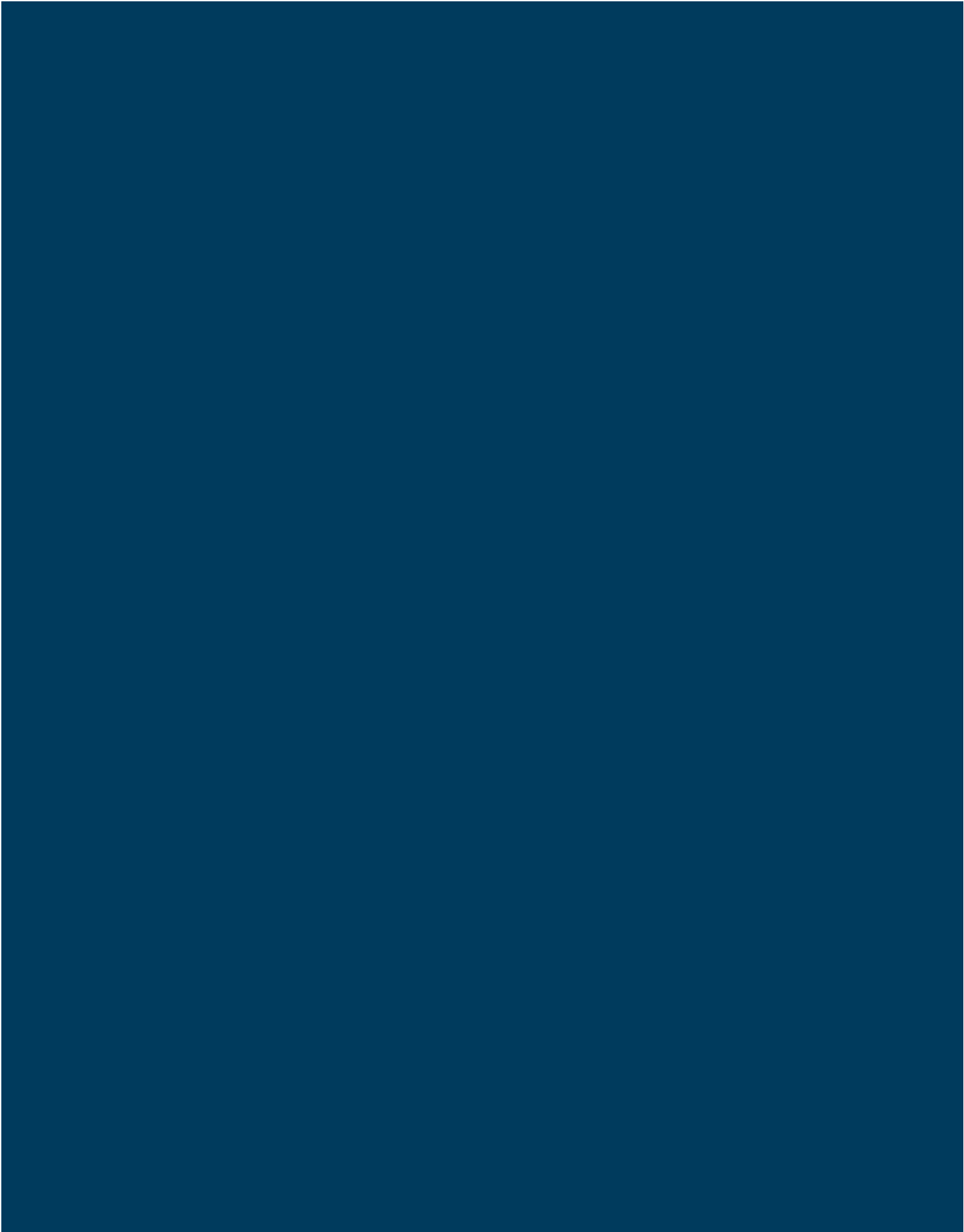
Attachment E: Mandatory Requirements

This section will provide instructions to vendors to respond to mandatory requirements as an attachment titled Attachment E: Mandatory Requirements.

Instructions: The mandatory requirements must be met by the vendor as a part of the submitted proposal. Failure on the part of the vendor to meet any of the mandatory requirements may result in their disqualification of the proposal at the sole discretion of PRMP. The term "must" stipulate and identifies a mandatory requirement. The vendor is to demonstrate compliance with mandatory requirements in their proposal. If the vendor's proposal meets the mandatory requirements, the vendor's proposal may be included in the cost evaluation of this RFP. For mandatory requirements that involve documentation, vendors should include that documentation with their technical proposal. Any documentation for mandatory requirements not supplied with their technical proposal must be submitted before contract execution. When appropriate, the vendor's proposal must provide narrative responses addressing the area listed below:

1. The vendor must provide the right of access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary.

   BerryDunn agrees to provide PRMP or its authorized designee right of access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary.

2. The vendor must support PRMP's requests for information in response to activities including, but not limited to:

   a. Compliance audits

   b. Investigations

   c. Legislative requests

   BerryDunn will support PRMP's requests for information in response to activities above that fall within the anticipated scope of services or otherwise agreed.

3. The vendor must provide authorization from a parent, affiliate, or subsidiary organization for the PRMP to have access to its records if such a relationship exists that impacts the vendor's performance under the proposed contract.

   There are no such relationships that exist that would impact the performance under the proposed contract.

4. The vendor must agree to comply with current and future PRMP and federal regulations as is necessary to support this RFP.

   BerryDunn will comply with any applicable current and future PRMP and federal regulations in our support the delivery of EOMC services.

   For additional detail on our approach to compliance with PRMP and federal regulations, refer to Section F.

5. The vendor must help ensure that all applications inclusive of internet, intranet, and extranet applications associated with this contract are compliant with Section 508 of the Rehabilitation Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 CFR 1194.21 and 36 CFR 1194.22.

   BerryDunn certifies that all applications inclusive of internet and intranet, and extranet applications associated with this contract are compliant with Section 508 of the Rehabilitation

Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 CFR 1194.21 and 36 CFR 1194.22.

6. The vendor must perform according to approved SLAs and identified Key Performance Indicators (KPIs) with associated metrics in the areas listed in **Appendix 1: Service-Level Agreements and Performance Standards.**

   BerryDunn plans to comply with SLAs and KPIs set forth herein this proposal response. For additional detail, please refer to Attachment H: Requirements Traceability Matrix and Section F.5.b.

7. The vendor must initially submit and then update deliverables as is detailed within the RFP, as is necessary for the assignment's success, and at the request of PRMP.

   BerryDunn will submit and then update deliverables as-is necessary to support the contents of this RFP and our proposal response. For additional detail, please refer to Section F.3 of this proposal.

8. The vendor must submit updated deliverables for PRMP's approval based on the Schedule and Work Plan.

   BerryDunn will submit updated deliverables for PRMP's approval based on the service area's schedule and work plan.

   For additional detail on our proposed approach, please refer to Section F.3 and Section F.5.

9. The vendor must provide a drug-free workplace, and individuals must not engage in the unlawful manufacture, distribution, dispensation, possession, abuse, or use of a controlled substance in the performance of the contract. (Drug-Free Workplace Act of 1988)

   In accordance with the Drug-Free Workplace Act of 1988, BerryDunn will comply with maintaining a drug-free workplace and our individuals will not engage in any unlawful activities.

10. The vendor must comply with federal Executive Order 11246 related to Equal Employment Opportunity Act, the Clean Air Act, and the Clean Water Act.

    BerryDunn will comply with the applicable federal laws and regulations outlined in the RFP in the performance of this contract, including the following:

    - Federal Executive Order 11246

    - Clean Air Act

    - Clean Water Act

11. The vendor must perform all work associated with this contract within the continental United States (U.S.) or U.S. Territories.

    BerryDunn will perform all work associated with this contract within the continental United States or U.S. Territories.

12. The vendor must serve as a trusted partner to PRMP and represent PRMP's interests in all activities performed under the resulting contract.

> BerryDunn will serve as a trusted partner to PRMP and will represent PRMP's interests in all activities performed under the resulting contract.
>
> For additional detail on our proposed approach, please refer to Section F.3.

13. The vendor must serve as a trusted partner to MES Vendors in alignment with the requirements set forth in this RFP.

> BerryDunn will serve as a trusted partner to MES Vendors in alignment with the requirements set forth in this RFP.
>
> For additional detail on our proposed approach, please refer to Section F.3.

14. The vendor must, at a minimum, include the standard invoice package contents for PRMP, including, but not limited to:

    a. An authorized representative of the contracted party must sign an itemized description of services rendered for the invoice period. Additionally, the vendor must include a written certification stating that no officer or employee of PRMP, its subsidiaries, or affiliates, will derive or obtain any benefit or profit of any kind from this vendor's contract. Invoices that do not include this certification will not be paid.

    b. Provide PRMP with a summary, for time and materials related costs, of hours for services rendered inside and outside Puerto Rico as well as outside Puerto Rico for each vendor resource.

    c. Provide PRMP with a list of all deliverables and services completed within an invoice period, as well as evidence that the PRMP has accepted and approved the work.

    d. Provide PRMP with three (3) physical and one (1) electronic invoice packages in support of the PRMP's review and approval of each invoice.

        i. Invoice Package #1 – Original Signature

        ii. Invoice Packages #2 - #3 – Hard Copy

        iii. Invoice Package #4 – Electronic

> BerryDunn will, at a minimum, include the standard invoice package contents for PRMP in accordance with the RFP.
>
> For additional detail on our proposed approach, please refer to Section F.5.a.

15. The vendor must use industry-standard Program Management standards, methodologies, and processes to help ensure the assignments are delivered on time, within scope, within budget, and in accordance with PRMP's quality expectations. PRMP utilizes the PMBOK® methodology.

> BerryDunn will use industry-standard Program Management standards, methodologies, and processes to help ensure the assignments are delivered on time, within scope, within budget, and in accordance with PRMP's quality expectations in accordance with the RFP and this proposal response.

For additional detail on our proposed approach, please refer to Section F.3.

16. The vendor must provide increased staffing levels if requirements, timelines, quality, or other standards are not being met, based solely on the discretion of and without additional cost to PRMP. In making this determination, PRMP will evaluate whether the vendor is meeting deliverable dates, producing quality materials, consistently maintaining high quality and production rates, and meeting RFP standards without significant rework or revision.

BerryDunn will provide increased staffing levels if requirements, timelines, quality, or other standards are not being met in accordance with the RFP and proposal response.

For additional detail please refer to Section D, F.3, and F.4.

17. The vendor must agree that PRMP retains ownership of all data, procedures, applications, licenses, and materials procured or developed during the contract period.

In alignment with the terms of the resulting contract, BerryDunn agrees that PRMP will retain ownership of the above mentioned work products procured and/or developed during the contract period.

18. The vendor must provide evidence that staff have completed all necessary forms prior to executing work for the contract.

BerryDunn will provide evidence that staff have completed all necessary forms prior to executing work for the contract.

19. The vendor staff must not have the capability to access, edit, and share personal information data, with unauthorized solution users, including but not limited to:

    a. Protected Health Information (PHI)

    b. Personally Identifiable Information (PII)

    c. Financial Transaction Information (FTI)

    d. Social Security Administration (SSA) data including, but not limited to: family, friends, and acquaintance information

To the extent that PRMP's technologies and processes allow, BerryDunn staff will not have the capability to access, edit, and share personal information data with unauthorized solution users in accordance with the RFP and this proposal response.

For additional detail on our approach to security requirements please refer to Section F.6.

BerryDunn

By signing below, I certify that I have reviewed these Mandatory Requirements in their entirety and agree that the vendor meets, and will continue to meet, each of these Mandatory Requirements in full.

Berry, Dunn, McNeil & Parker, LLC
_____
(Company)

William A. Richardson, Principal
_____
(Representative Name, Title)

207-842-8023/207-774-2375
_____
(Contact Phone/Fax Number)

October 23, 2023
_____
(Date)

_____
(Signature)

Attachment F: Response to Statement of Work

This section will provide instructions to vendors to respond to the requested services detailed in this RFP.

Instructions: The responses to each part of the statement of work are required as part of the submitted proposal. Responses will be scored as part of the Technical Proposal Evaluation. The vendor may also add images or diagrams for each response.

F.1   Approach to Scope and Requirements Management and Expertise

Please describe in narrative form how your organization will meet the following requirements (a-g):

F.1.a   Capabilities Knowledge, and Experience Performing Statement of Work

a. *Describe the vendor's capabilities, knowledge and experience performing the services described in __Statement of Work__ of this RFP.*
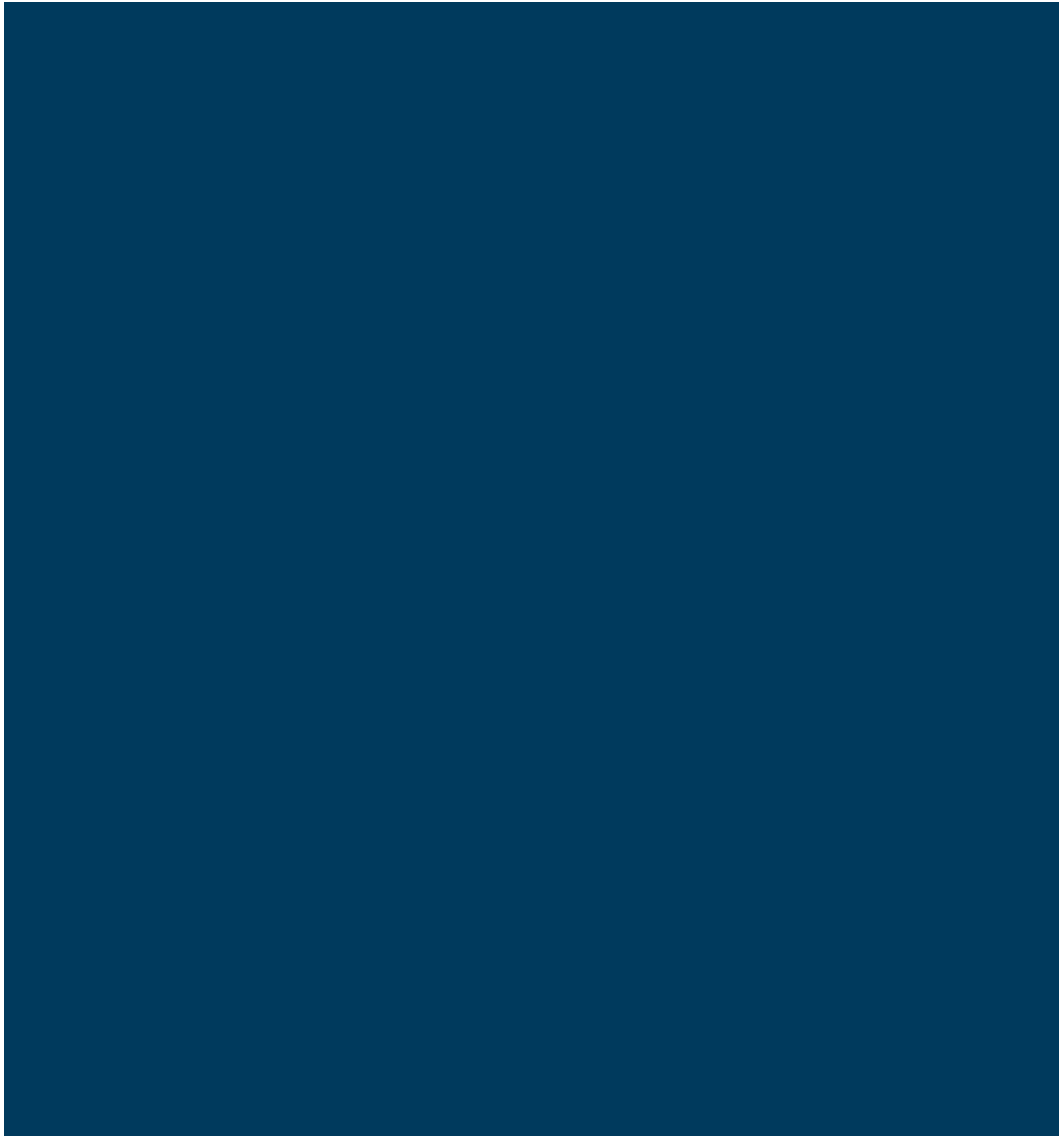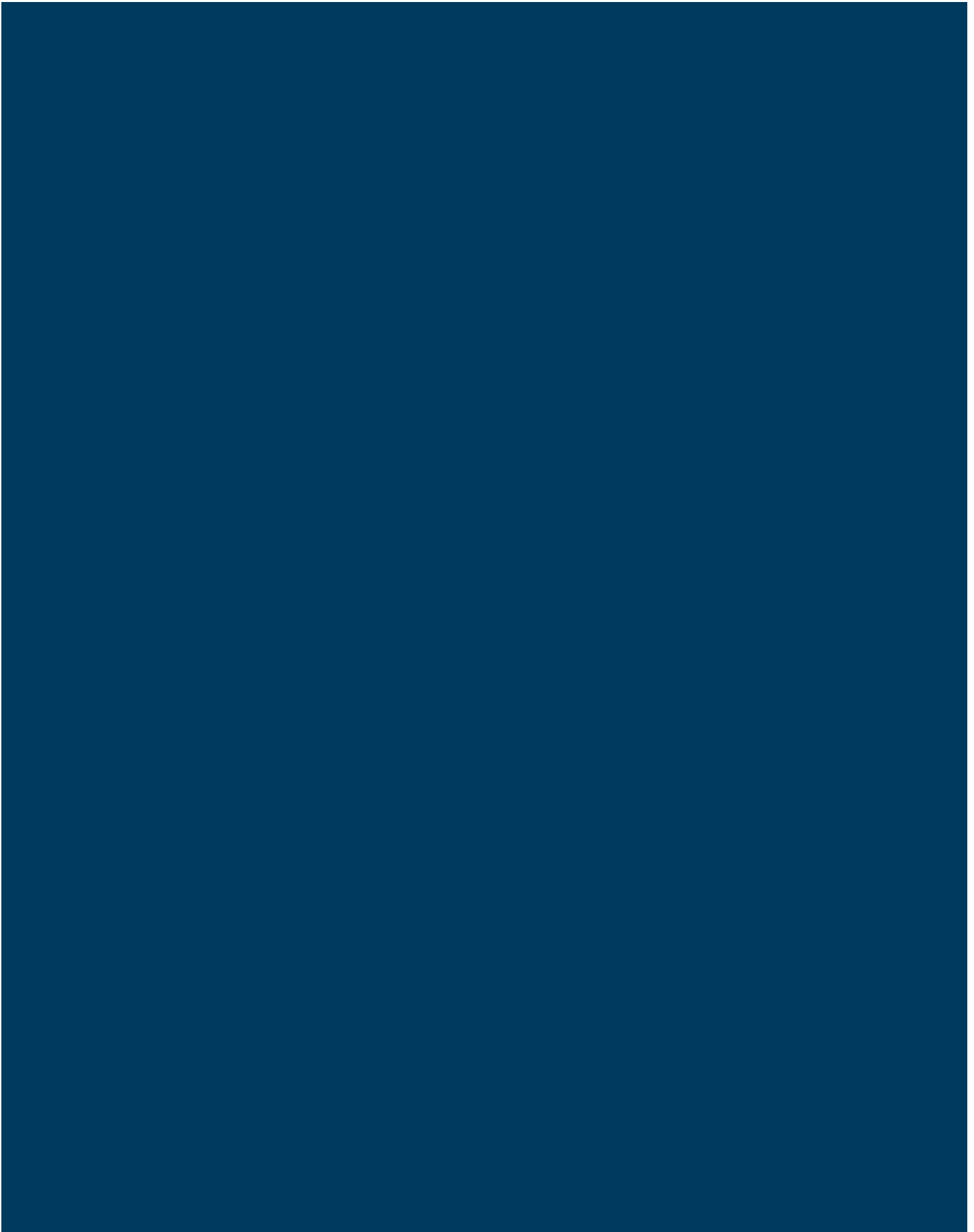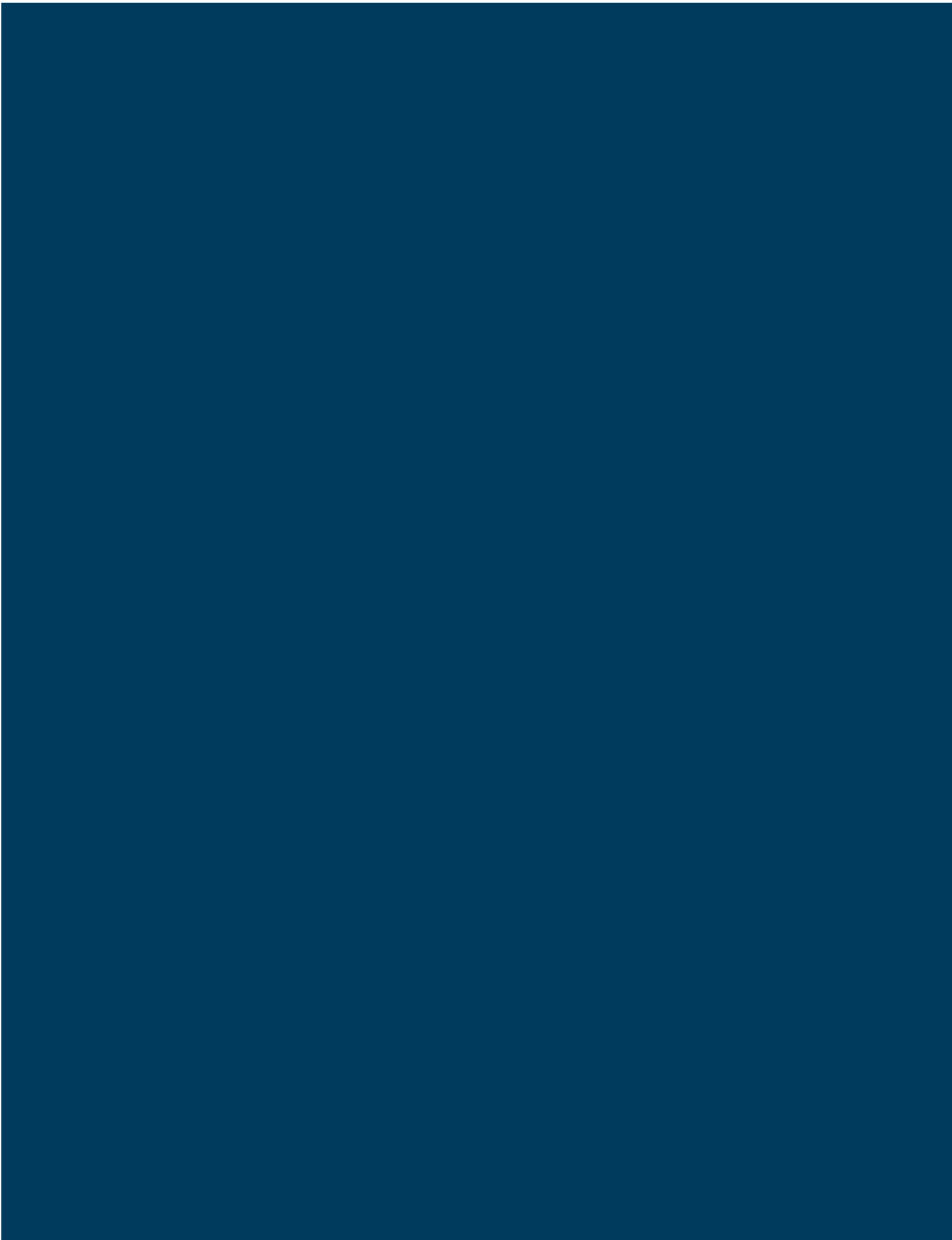
F.1.b Identifying Short-Term and Long-Term Work Activities

b. Describe the vendor's approach to identifying short-term and long-term work activities.
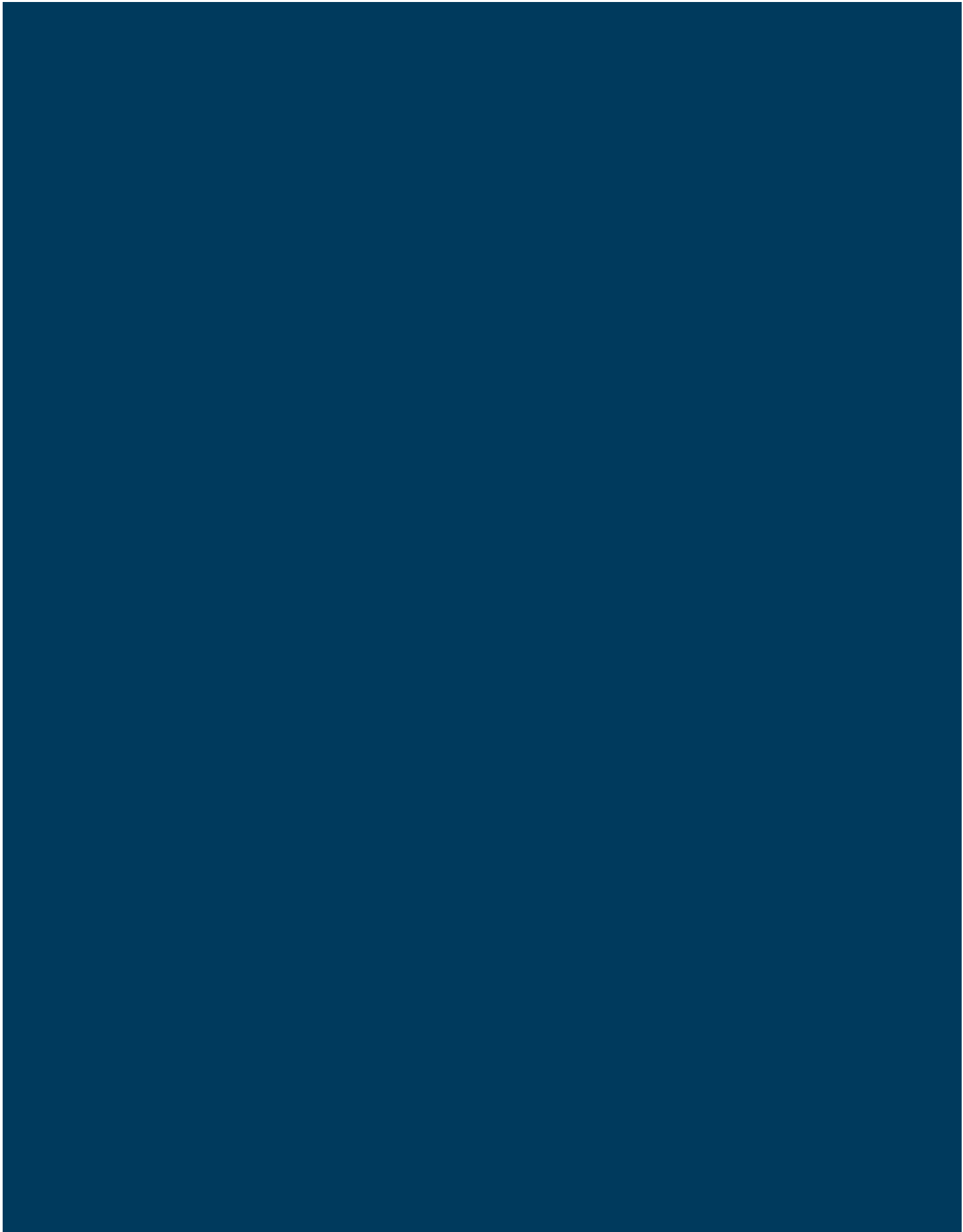
F.1.c   Executing the Possible Assignments

c. Describe your knowledge and experience with executing the possible assignments for the Services Areas included in the Statement of Work.
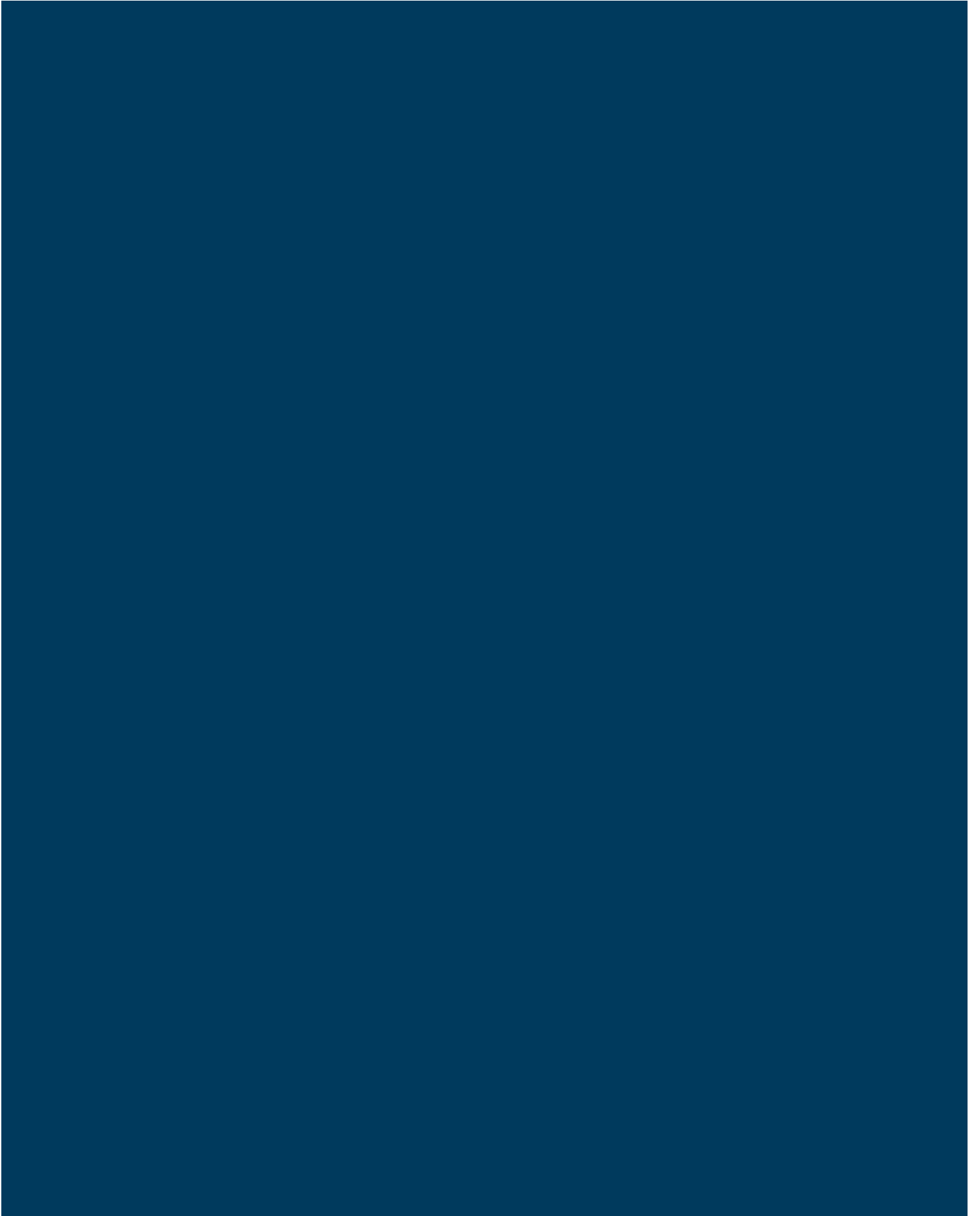
F.1.d   Approach Toward Building Relationships and Collaborating with PRMP and PRMP Staff

d.   Describe the vendor's approach toward building relationships and collaborating with PRMP and PRMP staff.
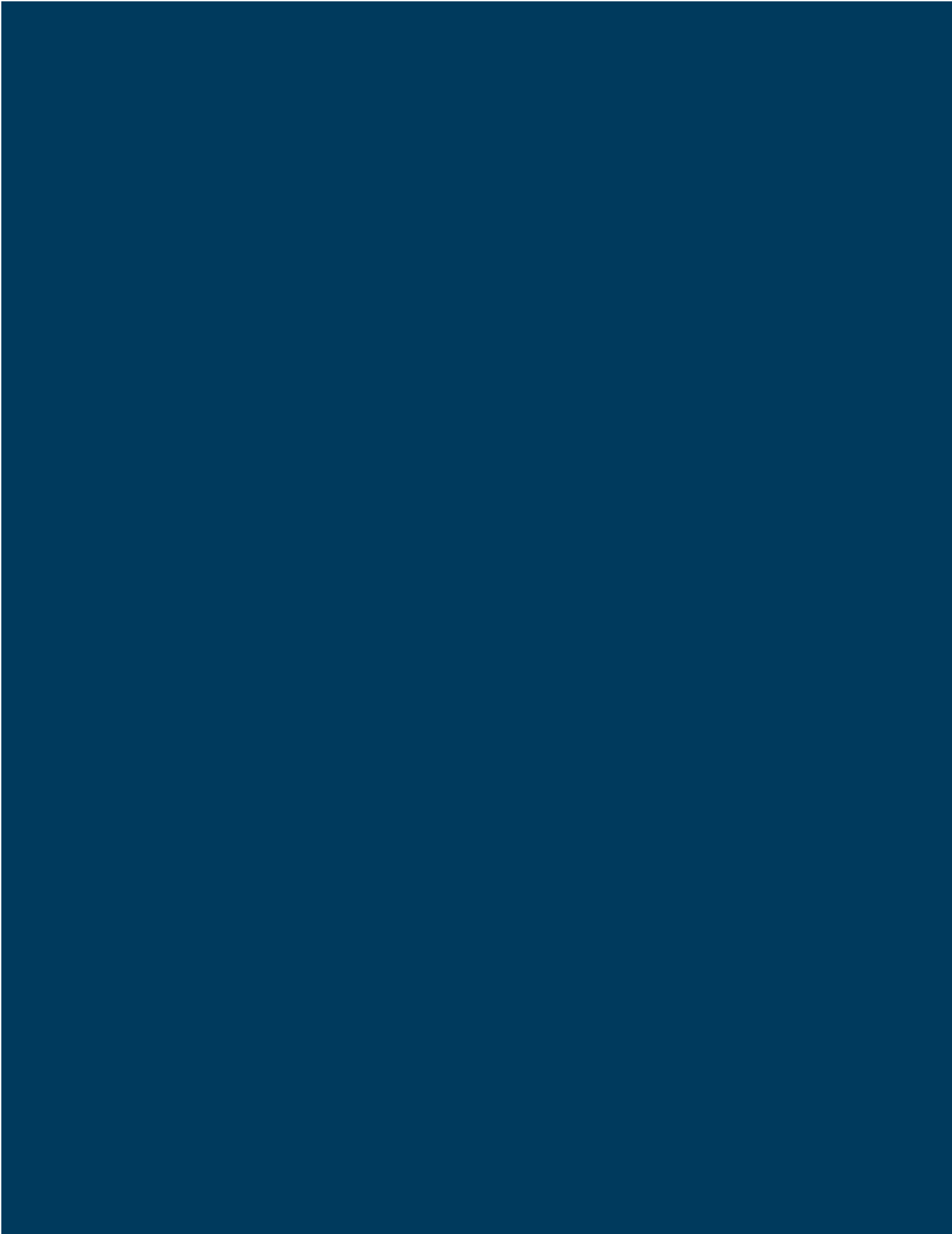
F.1.e   Capabilities, Knowledge and Experience with Assisting Agencies/Organizations

e.   Describe your capabilities, knowledge and experience with assisting agencies/organizations with the services requested in this RFP.
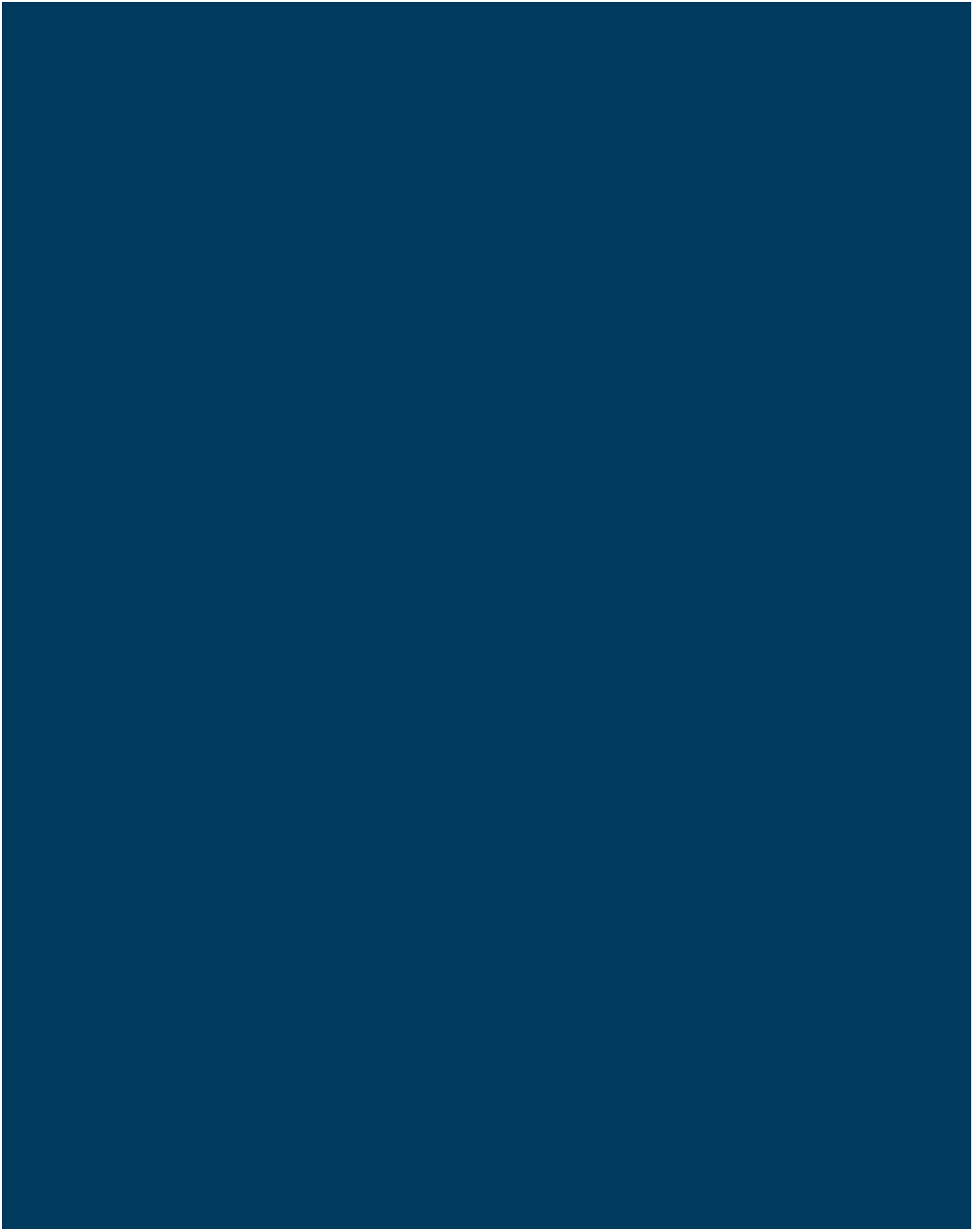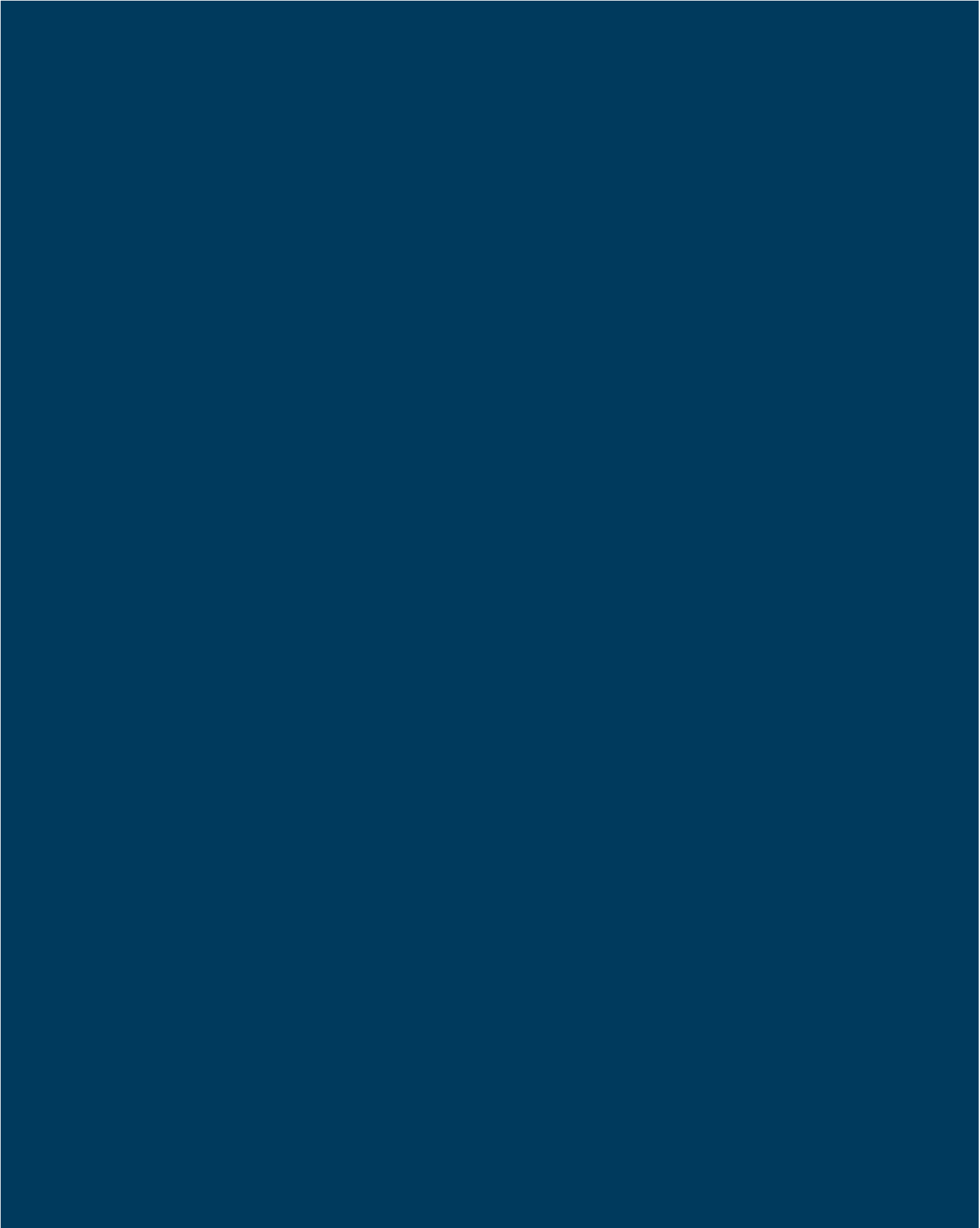
F.1.f   Overall Approach and Plan for Assessing PRMP, Programs and Processes

> *f.   Describe the overall approach and plan for assessing PRMP, programs and processes, including an illustration of the timeline with key activities, deliverables and milestones that includes the anticipated resource allocations by labor category that will support the proposed plan.*

F.1.g   Program Management Tools and Processes

g. *Describe in detail your Program Management experience with program management tools and processes. Provide recommendations for Program Management tools and how they could be used in PRMP.*
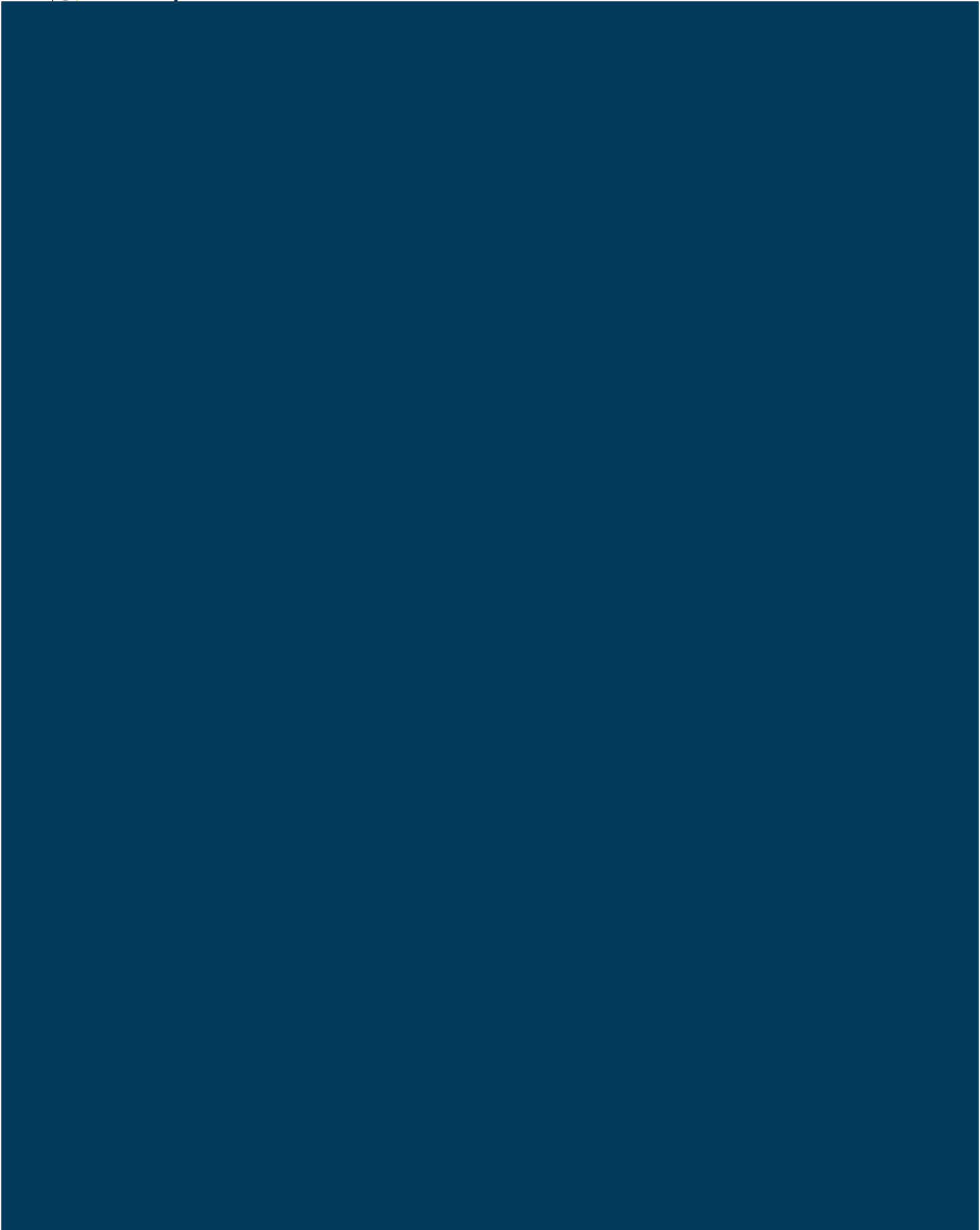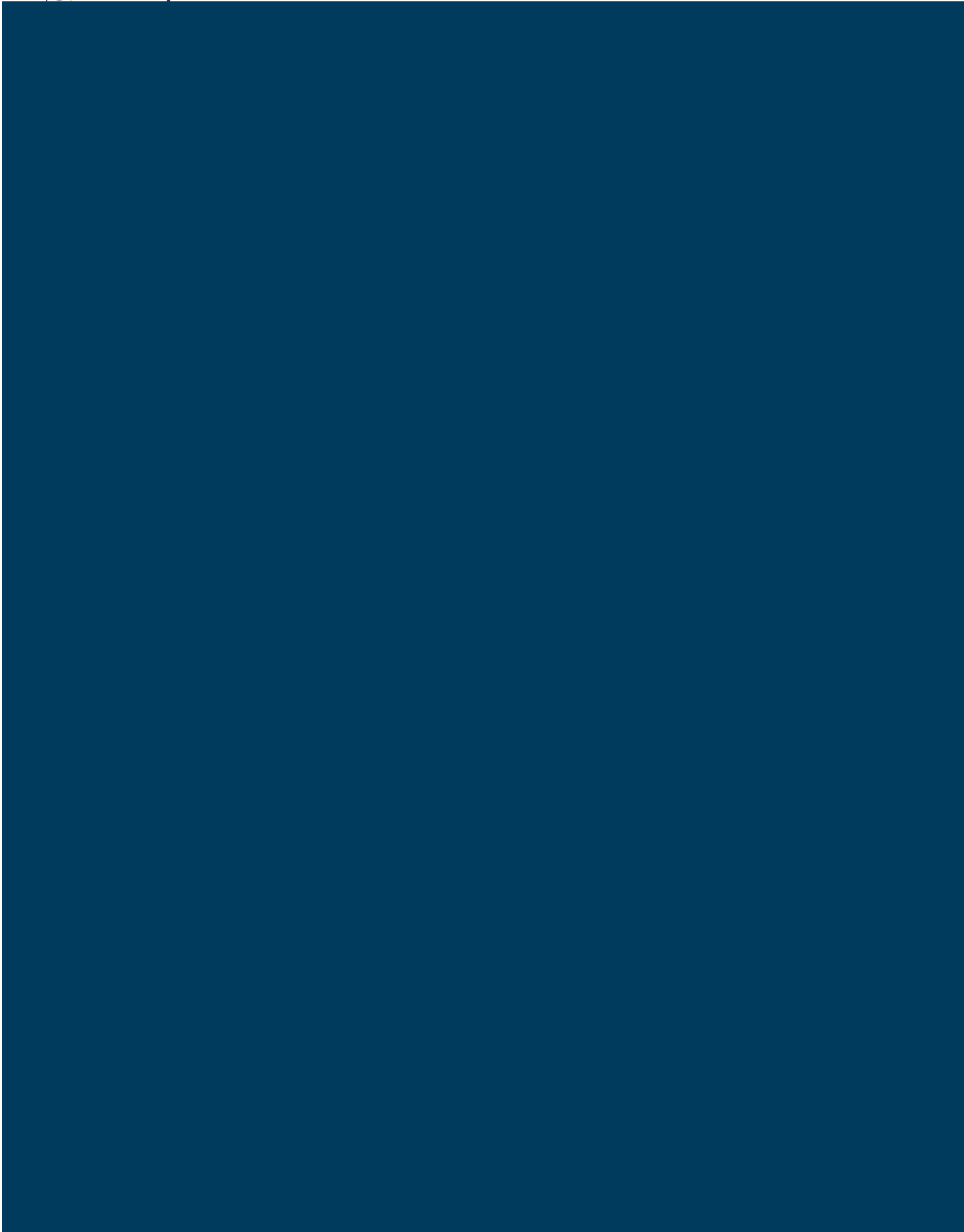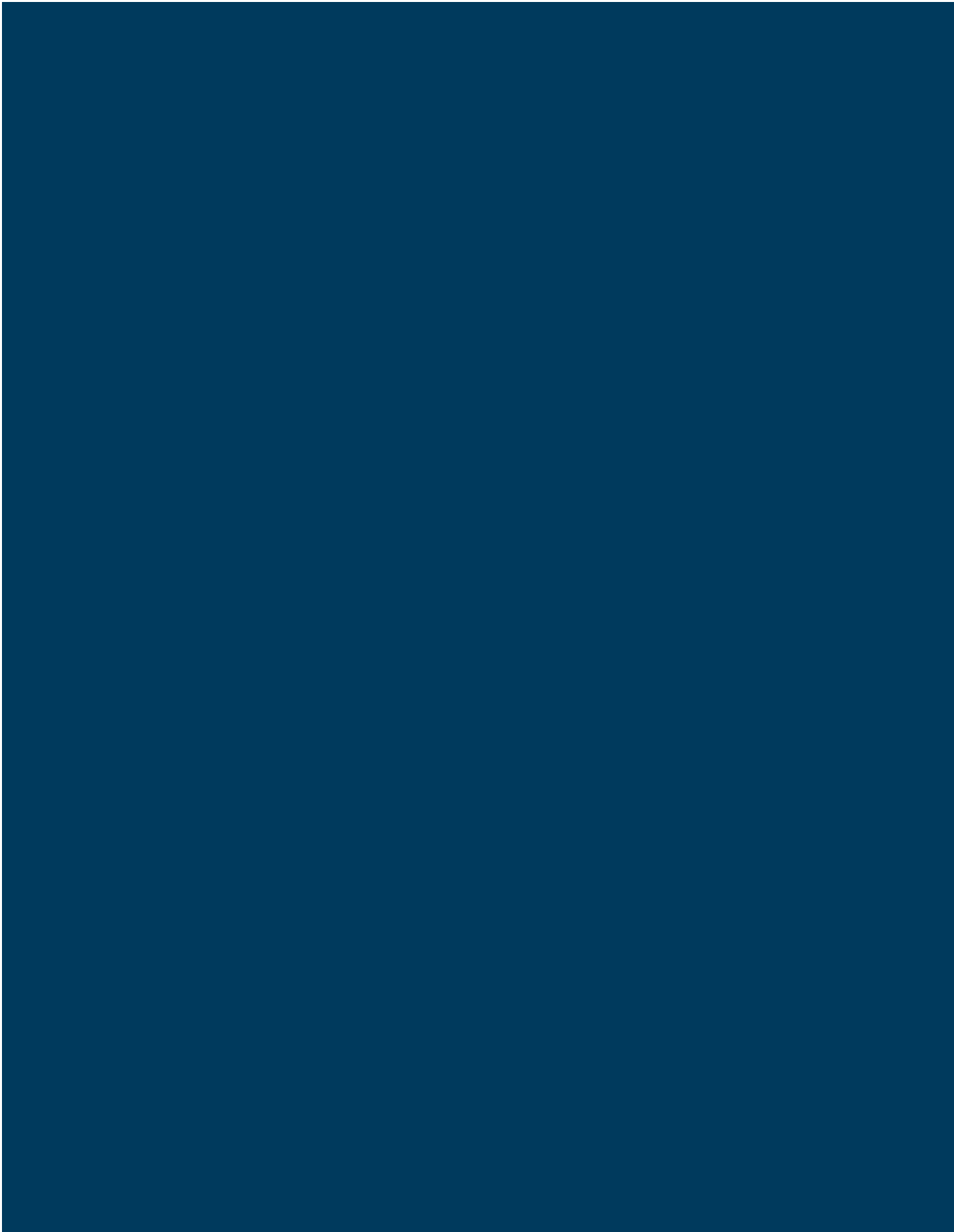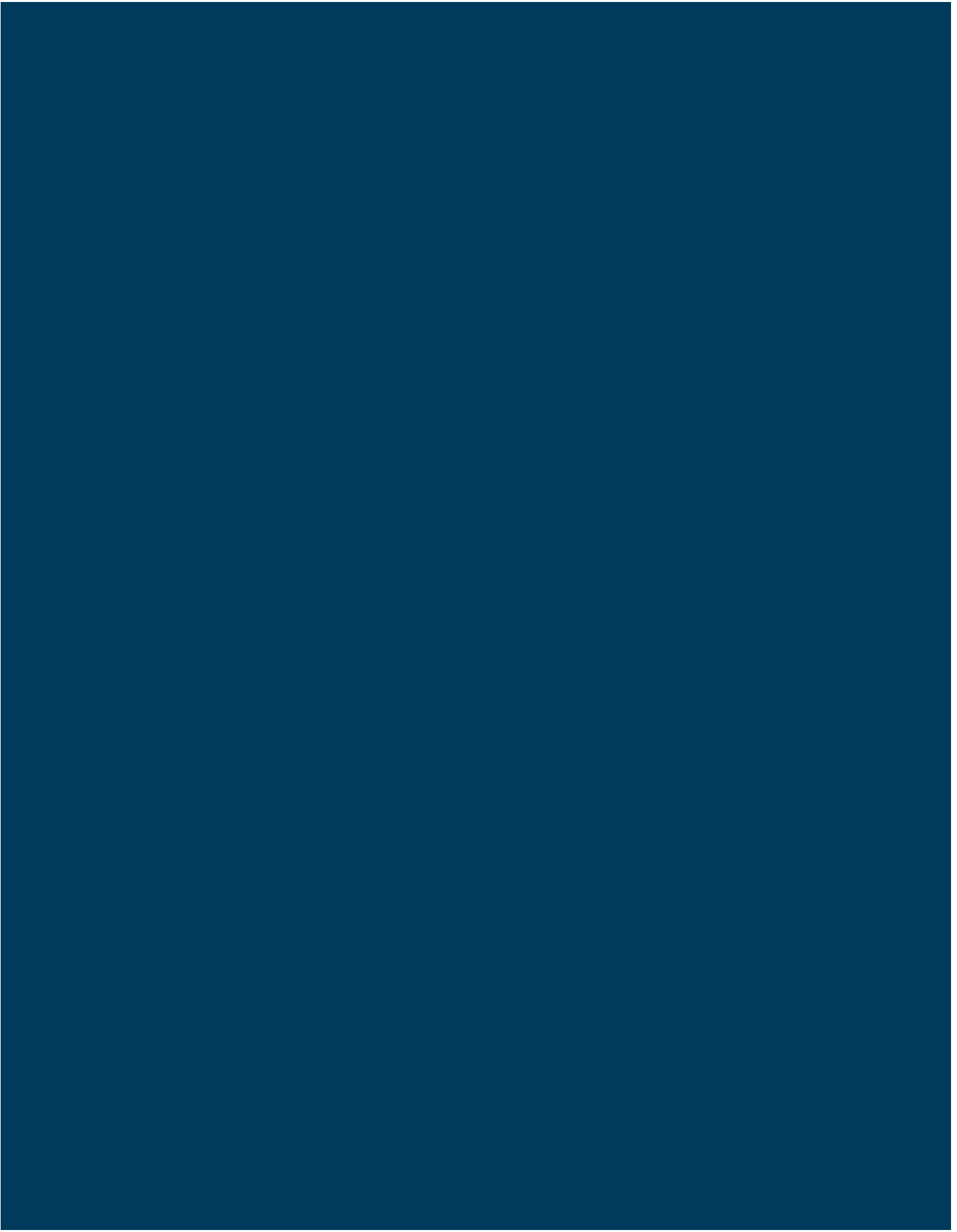
F.2 Knowledge and Experience for Each Business Area

Please describe the vendor's knowledge and experience for each item (a-k):

F.2.a Medicaid Enterprise System and/or Puerto Rico Medicaid Enterprise System (PRMES)

   a. *Medicaid Enterprise System and/or Puerto Rico Medicaid Enterprise System (PRMES)*
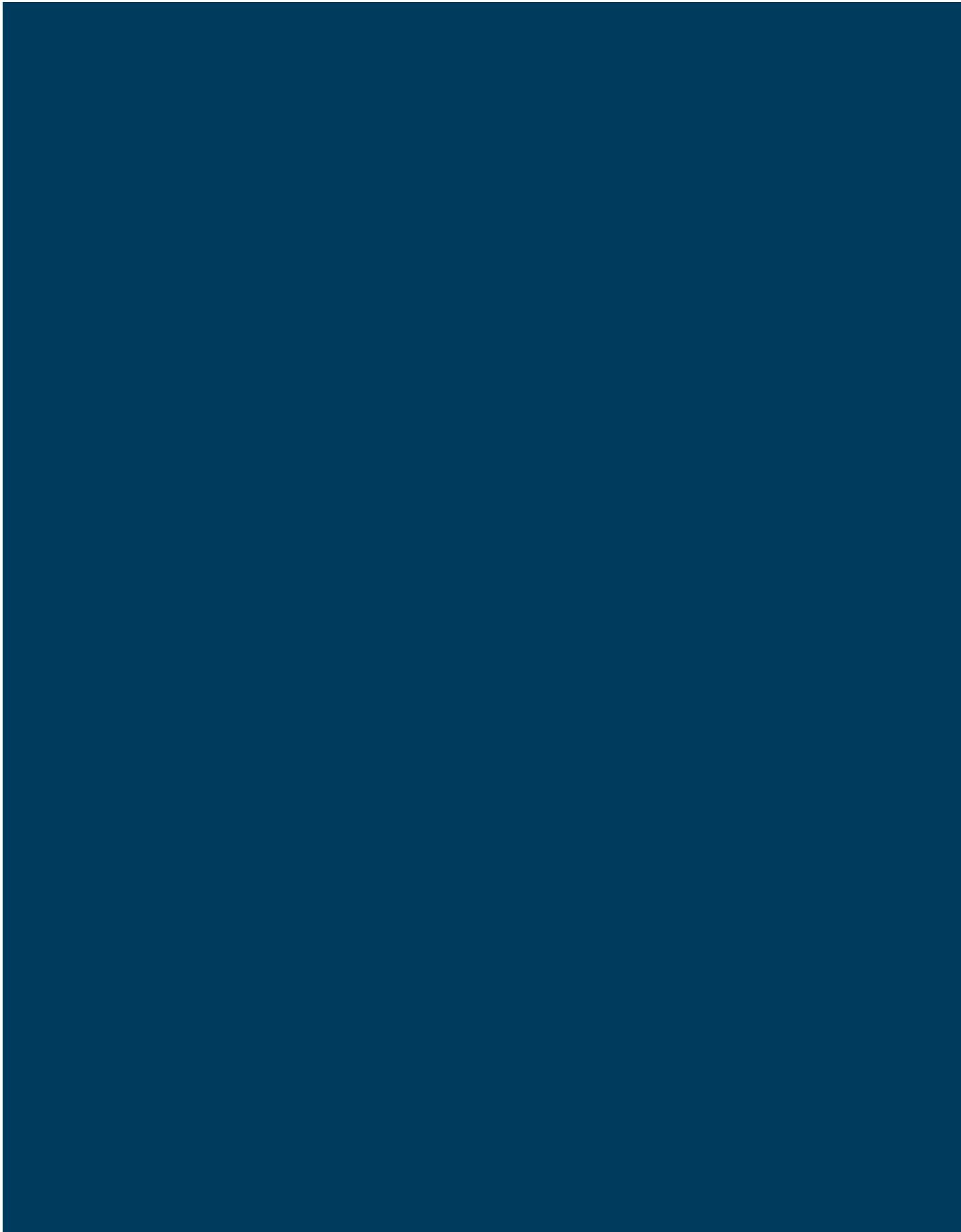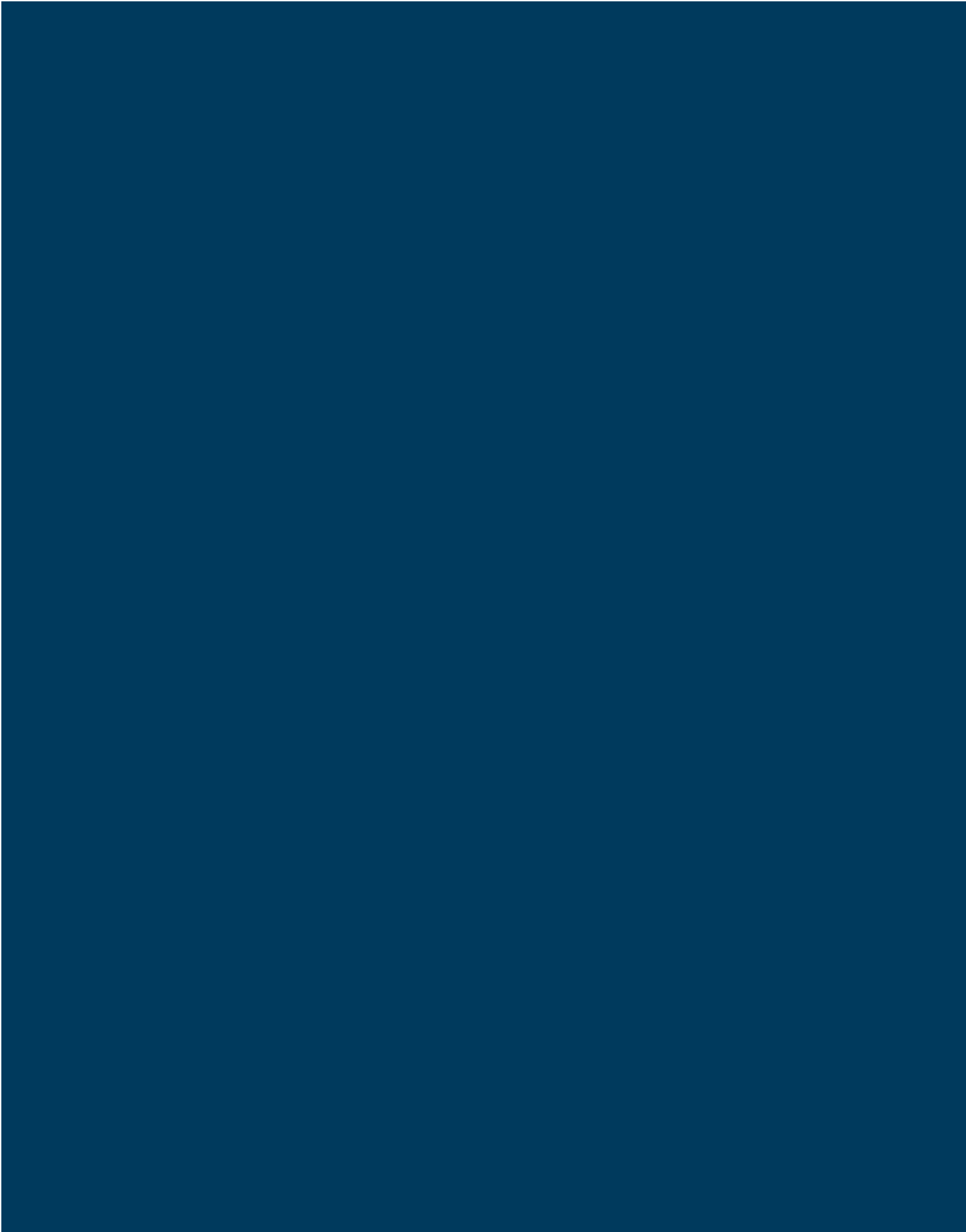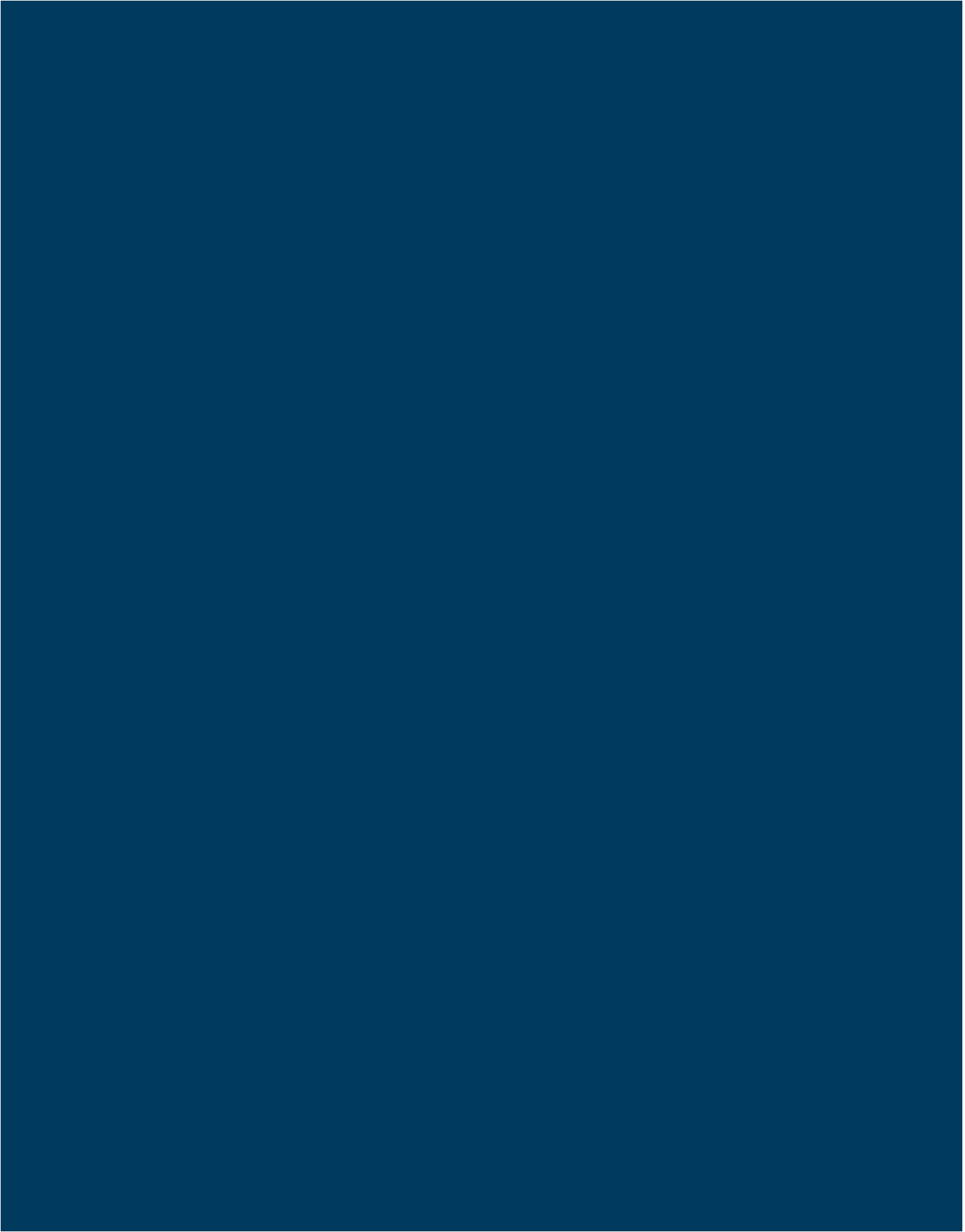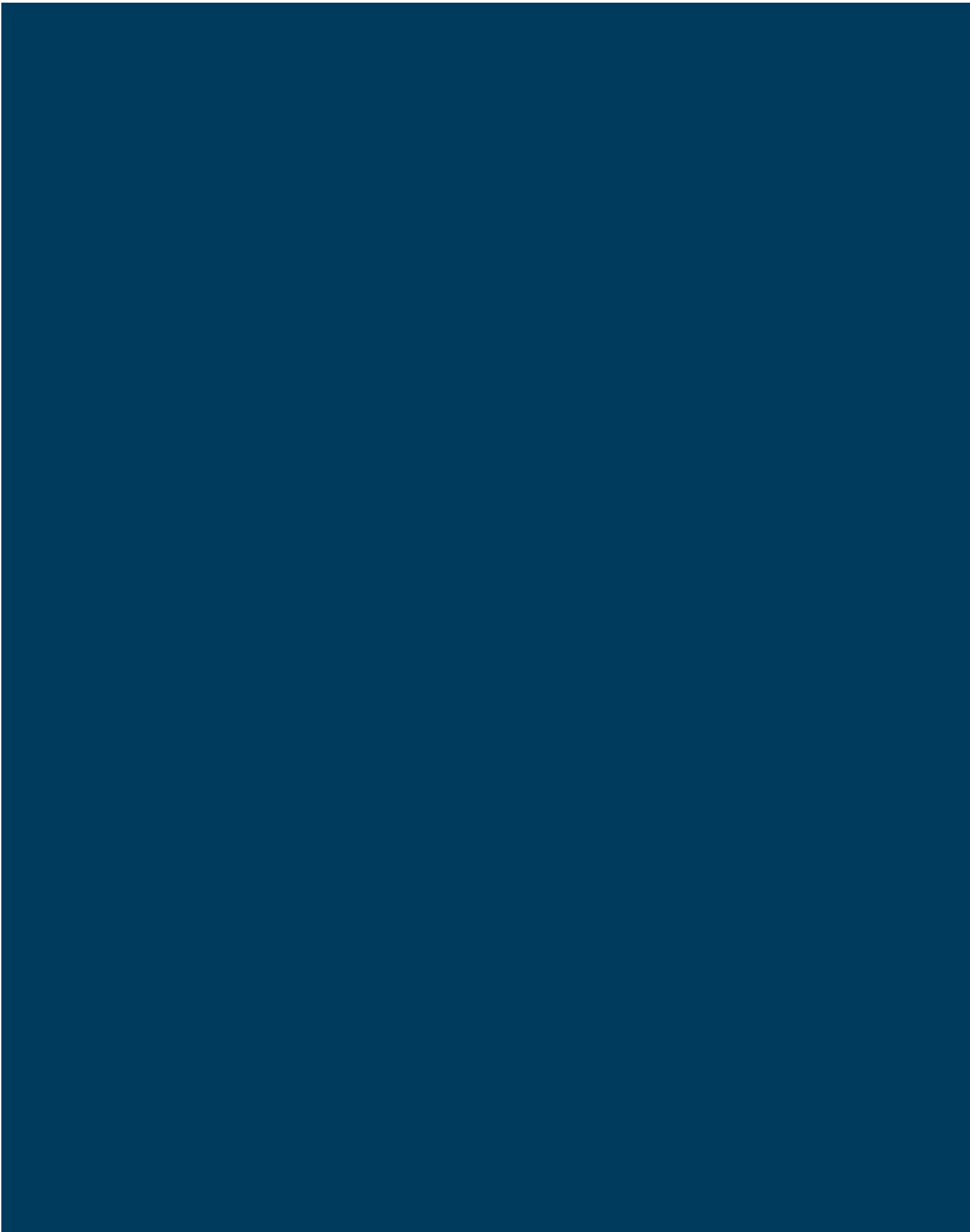
F.2.b   Puerto Rico Medicaid Management Information System (PRMMIS)
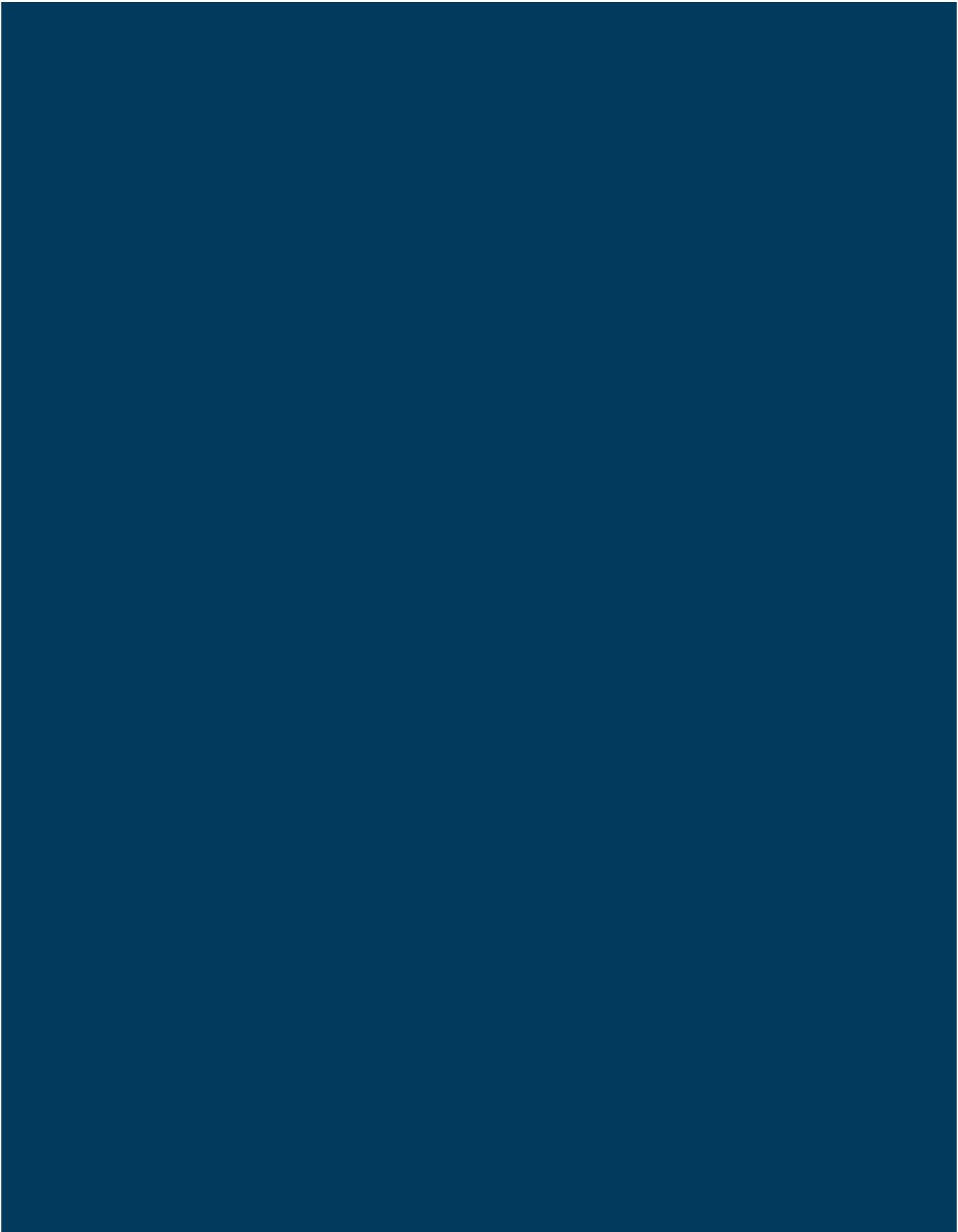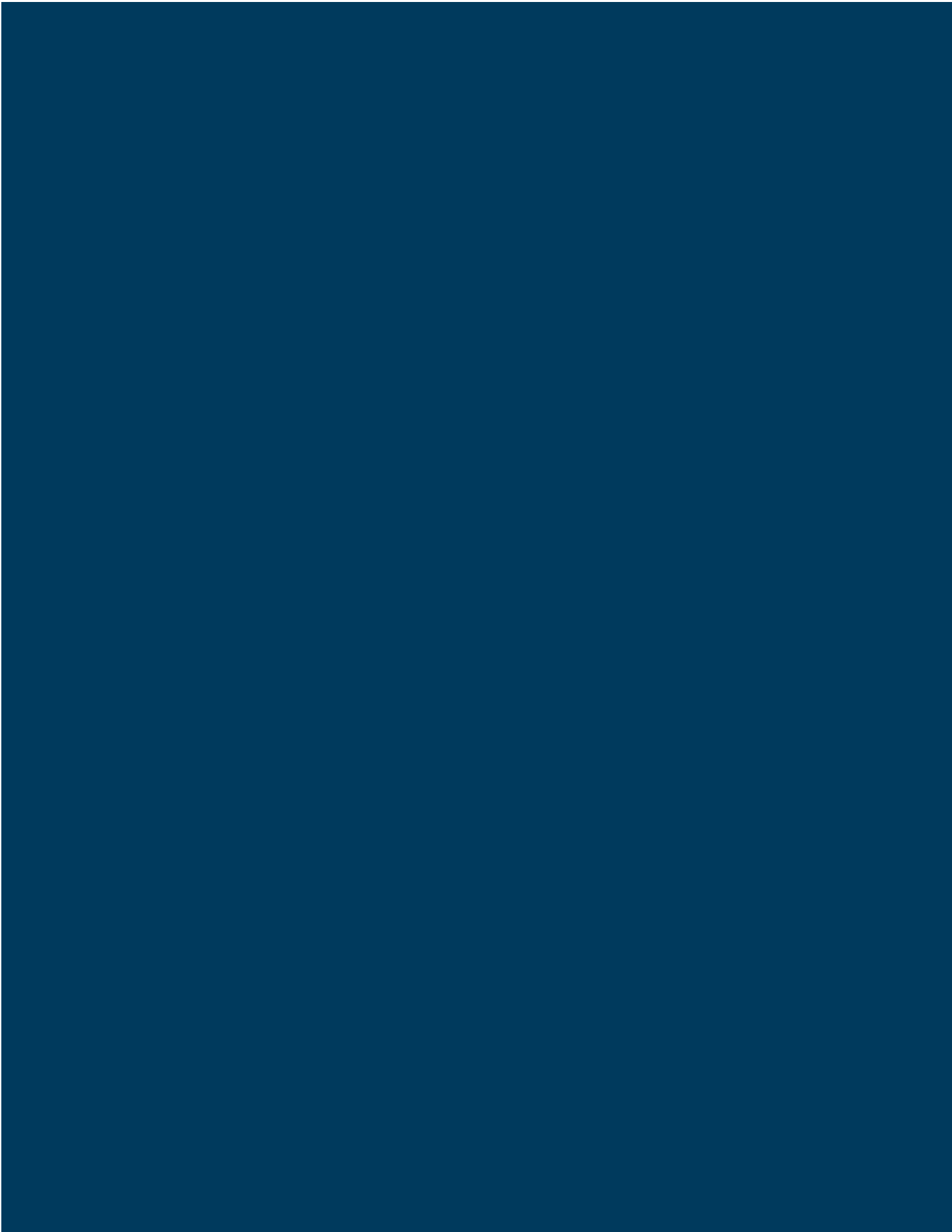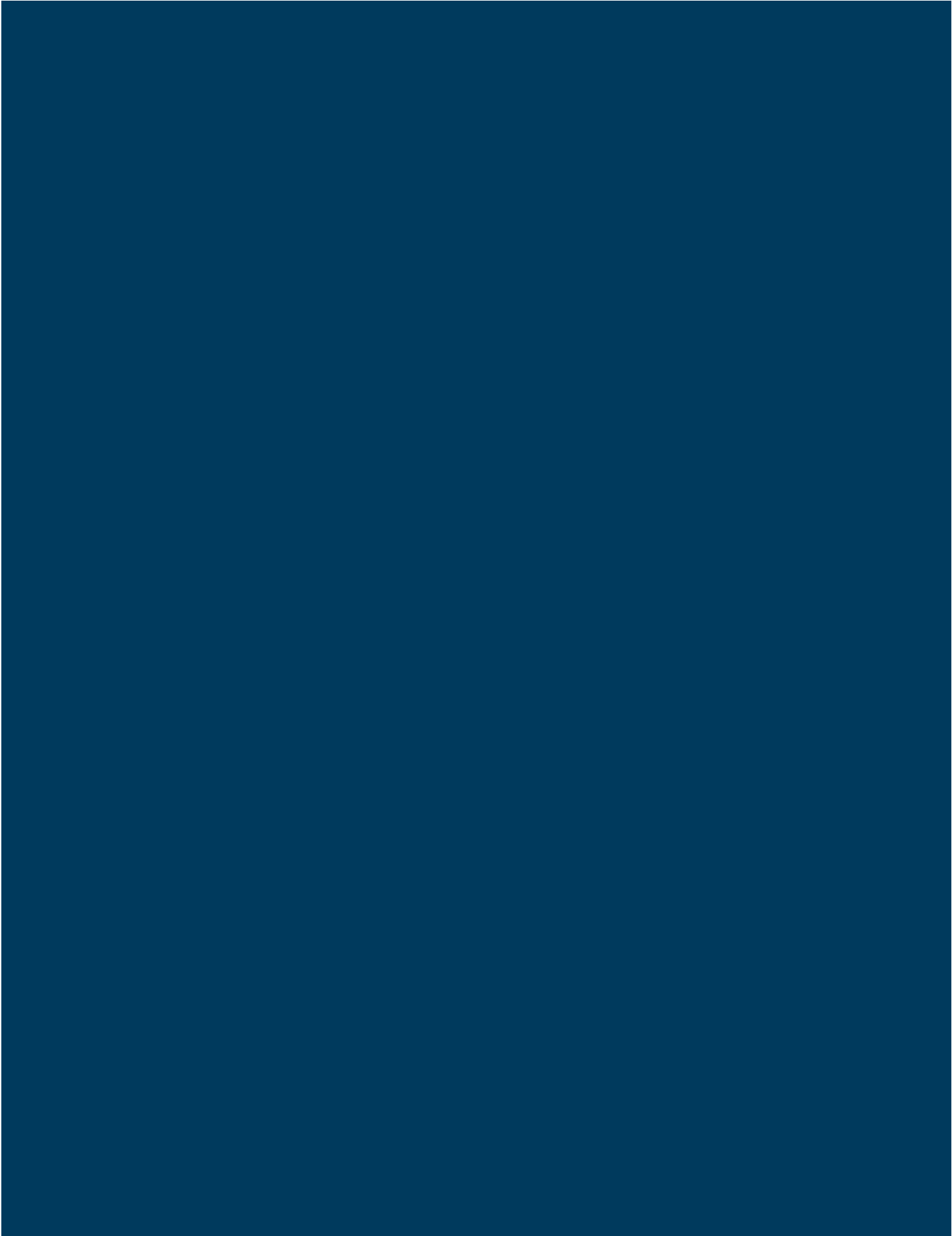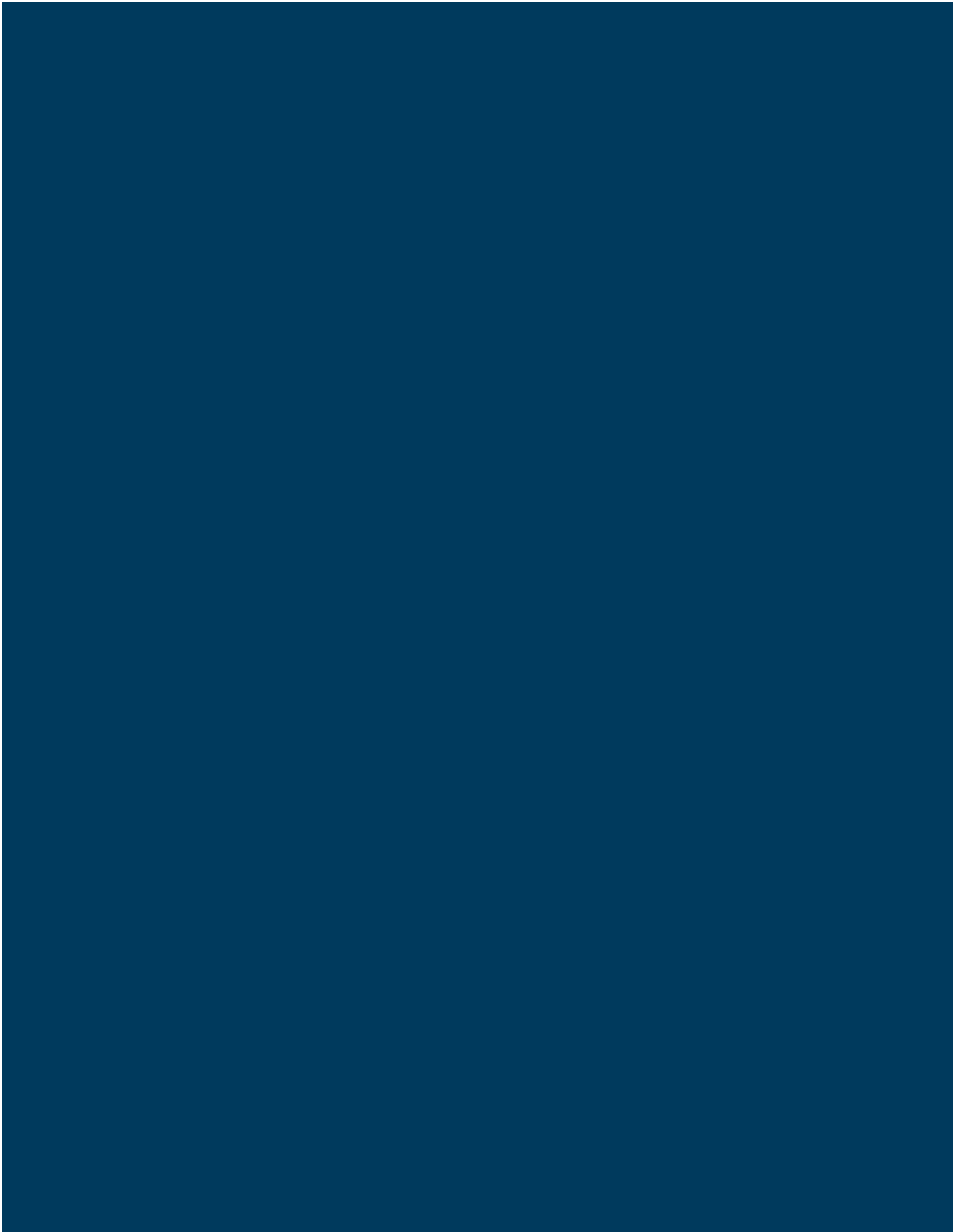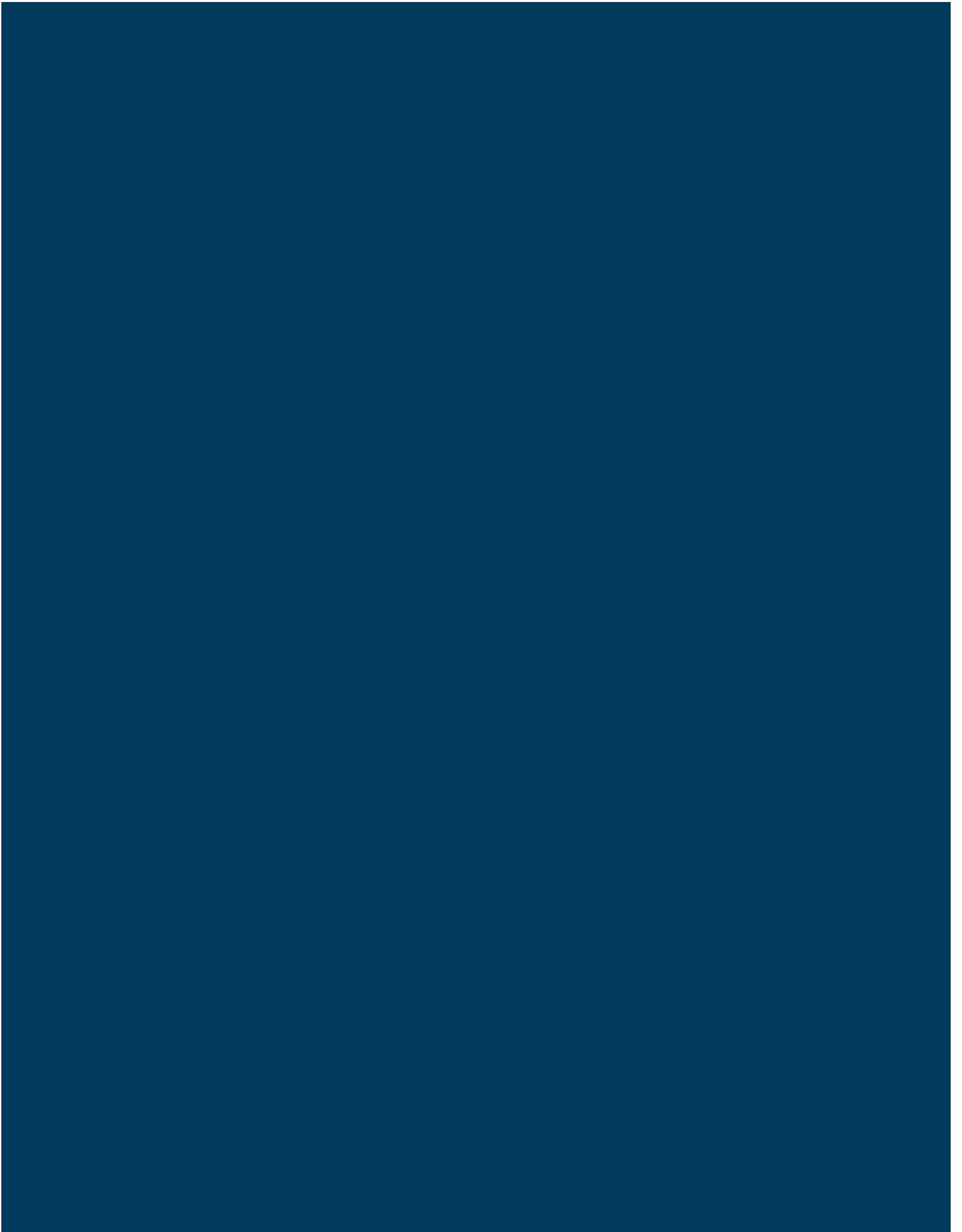
F.2.c   Provider Enrollment Portal (PEP)

F.2.d   Eligibility and Enrollment (E&E)

d.   Eligibility and Enrollment (E&E)
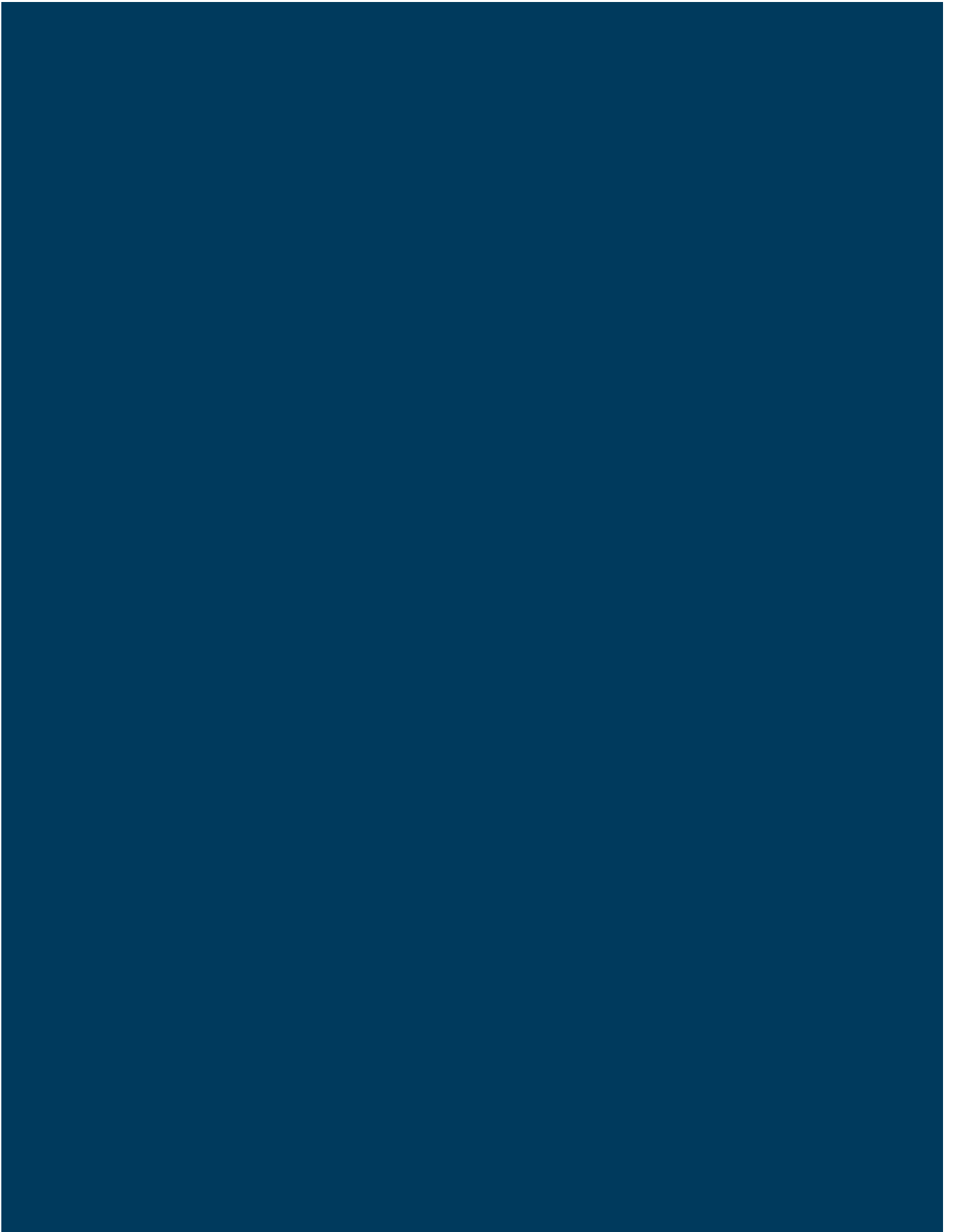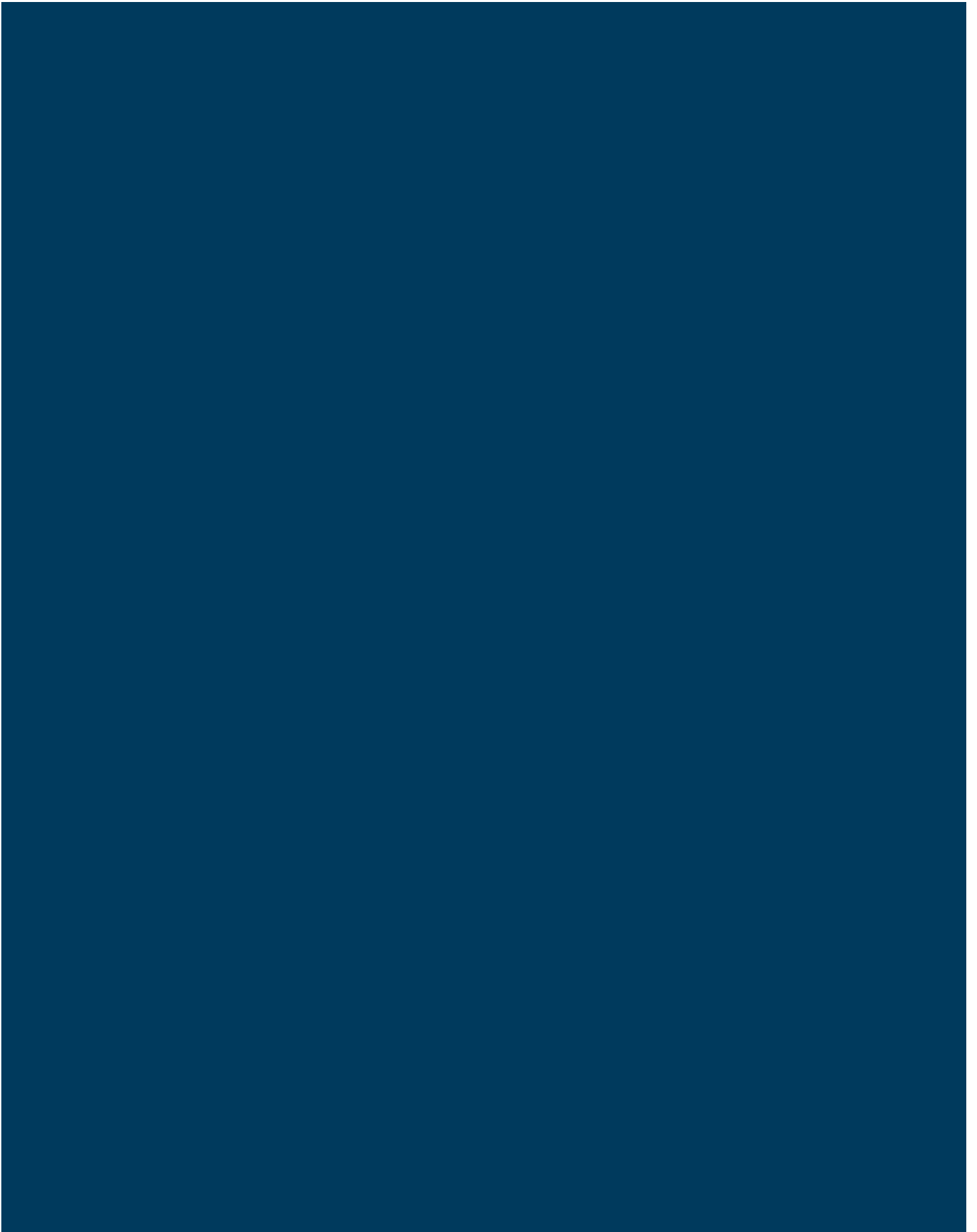
F.2.d.i   System known as Medicaid Information Technology Initiative, 3ʳᵈ Generation (MEDITI3G)

i. System known as Medicaid Information Technology Initiative, (MEDITI3G)
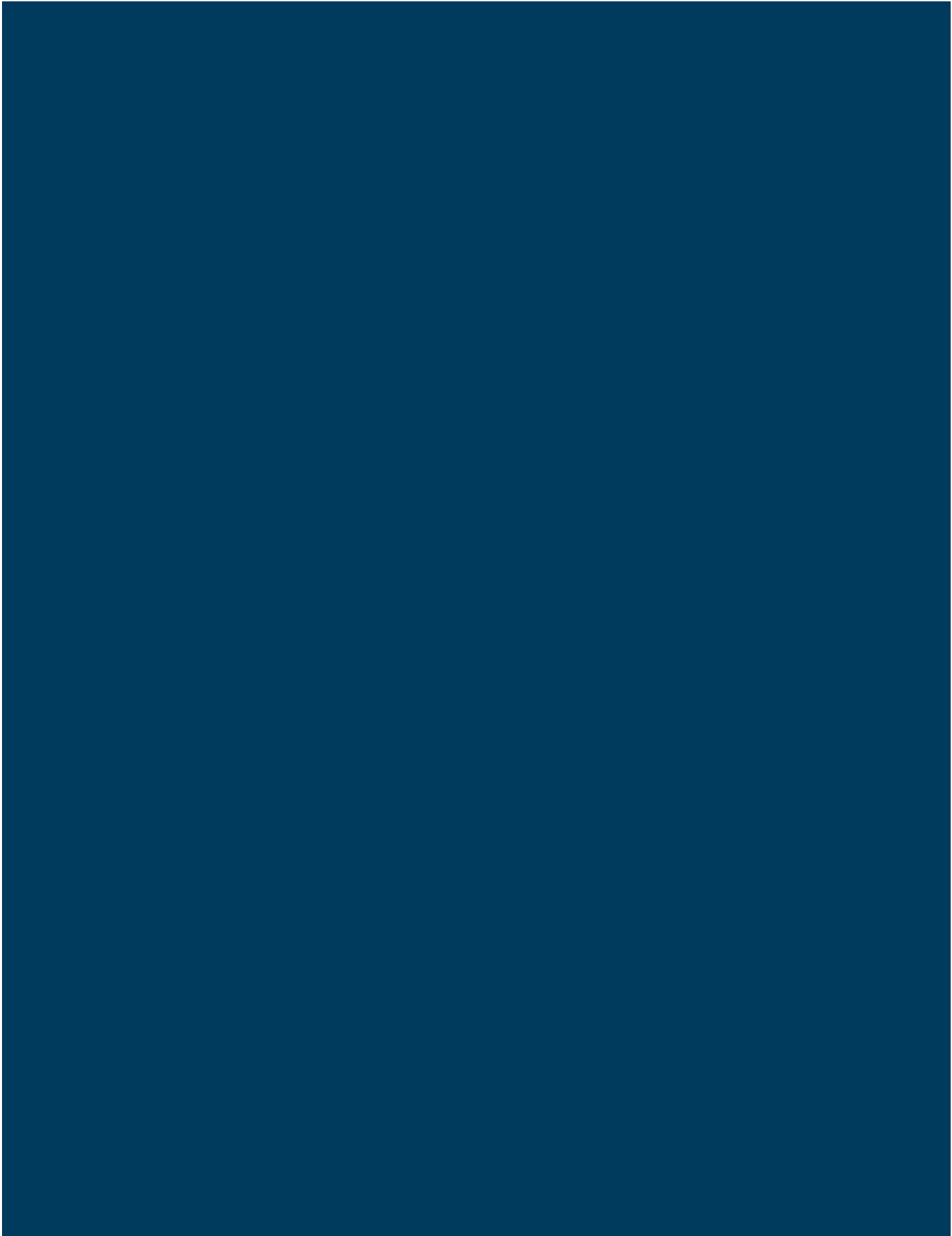
F.2.e   The Commonwealth's Health Information Exchange (HIE)

e.   *The Commonwealth's Health Information Exchange (HIE)*
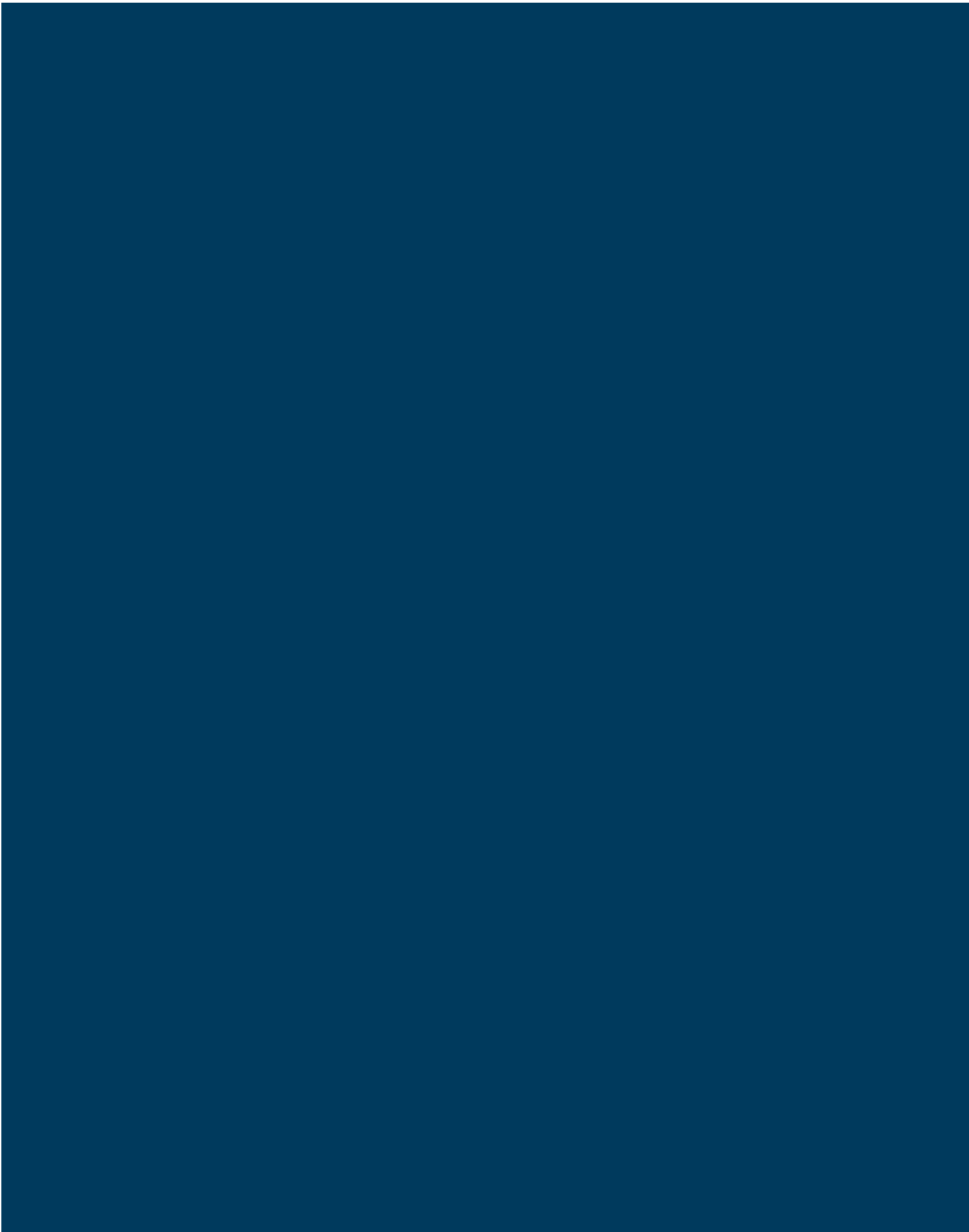
F.2.f   Procurement Office

f.   Procurement Office
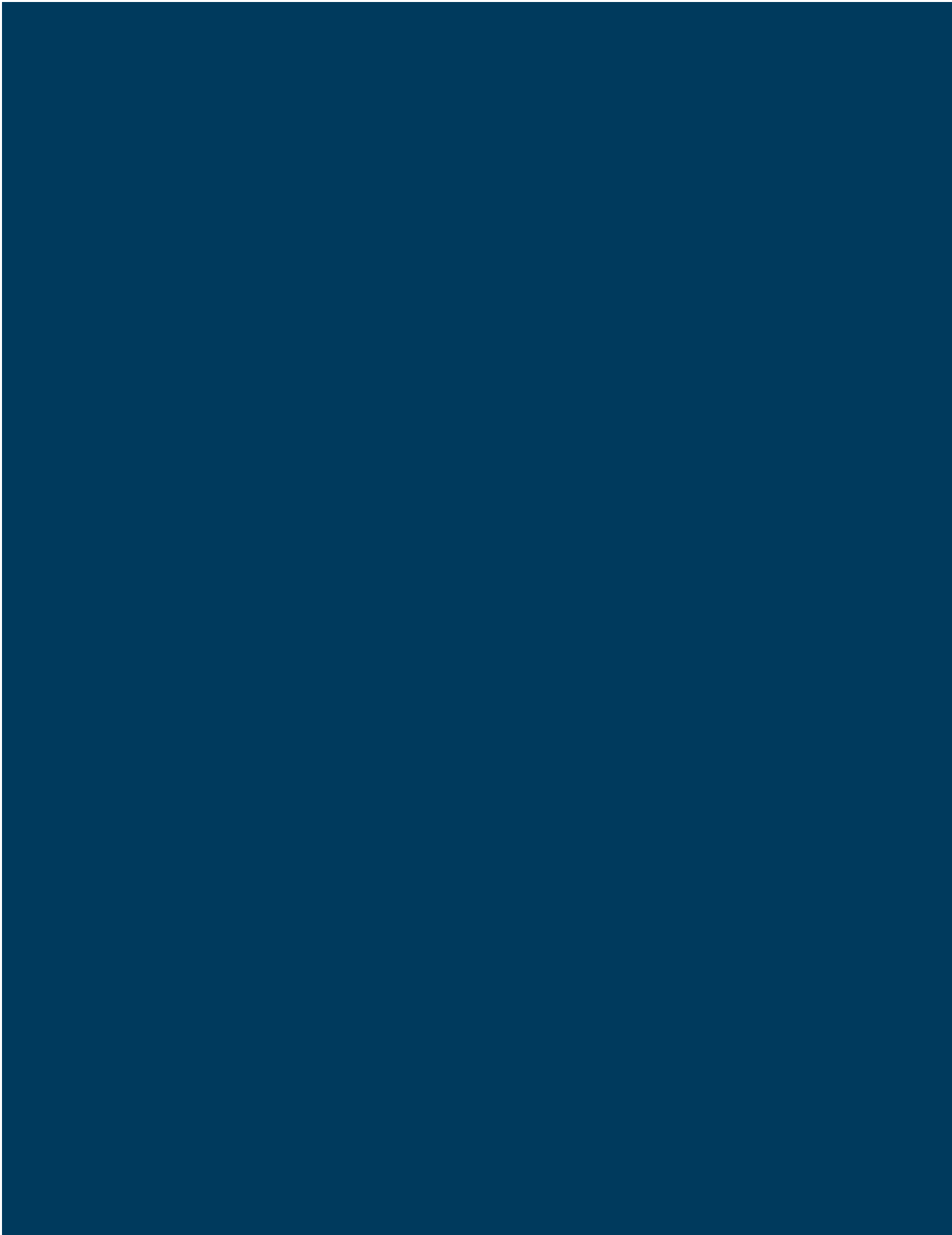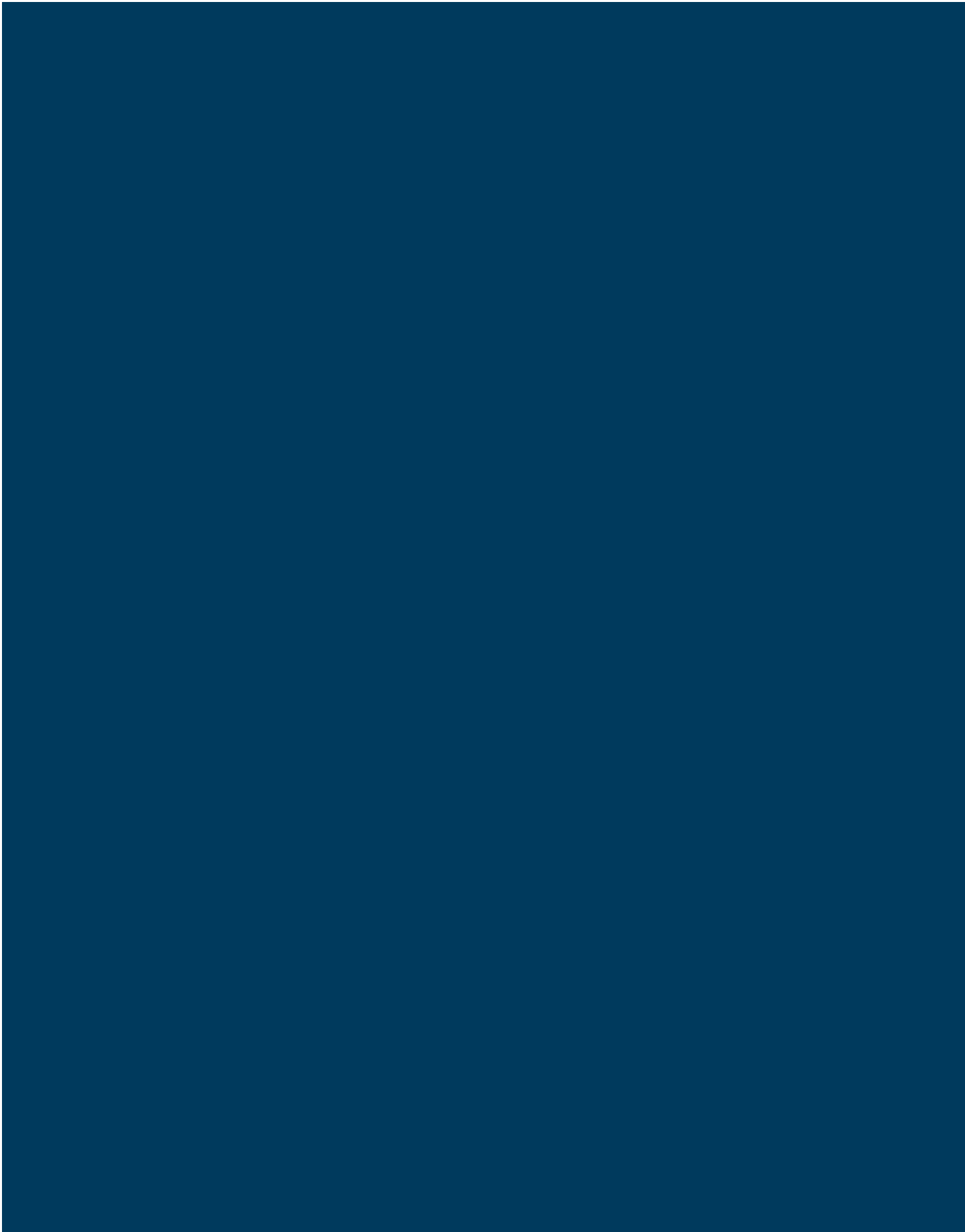
F.2.g   Program Integrity Unit (PIU)

g.   *Program Integrity Unit (PIU)*

F.2.h   Money Follow the Person Grant (MFP)

h.   Money Follow the Person Grant (MFP

F.2.i   Centralized Provider Enrollment and Credentialing (CPEC)

i.   Centralized Provider Enrollment and Credentialing (CPEC)

F.2.j   Organizational Change Management (OCM)

j.   Organizational Change Management (OCM)
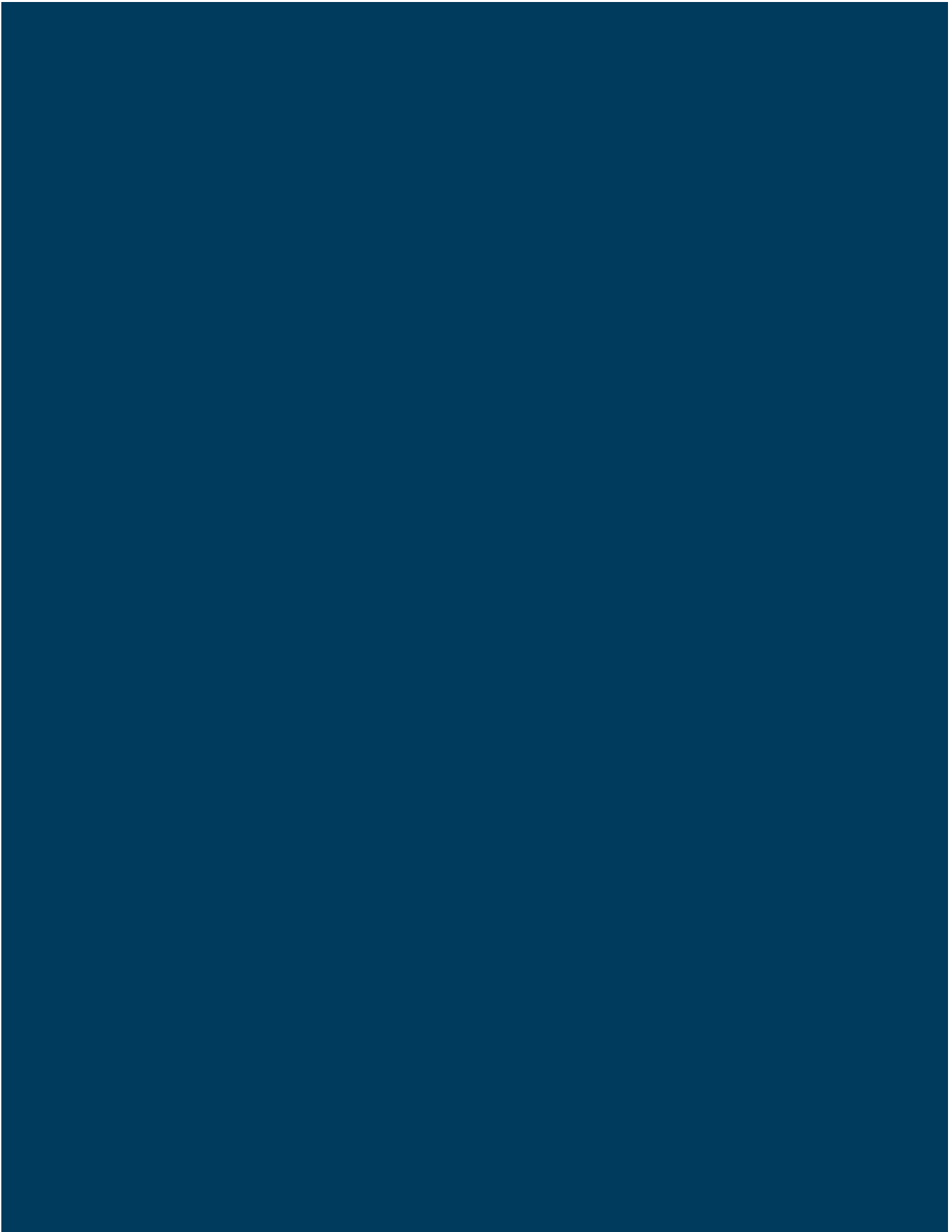
F.2.k   Enterprise Data Warehouse (EDW)

k.   *Enterprise Data Warehouse (EDW)*
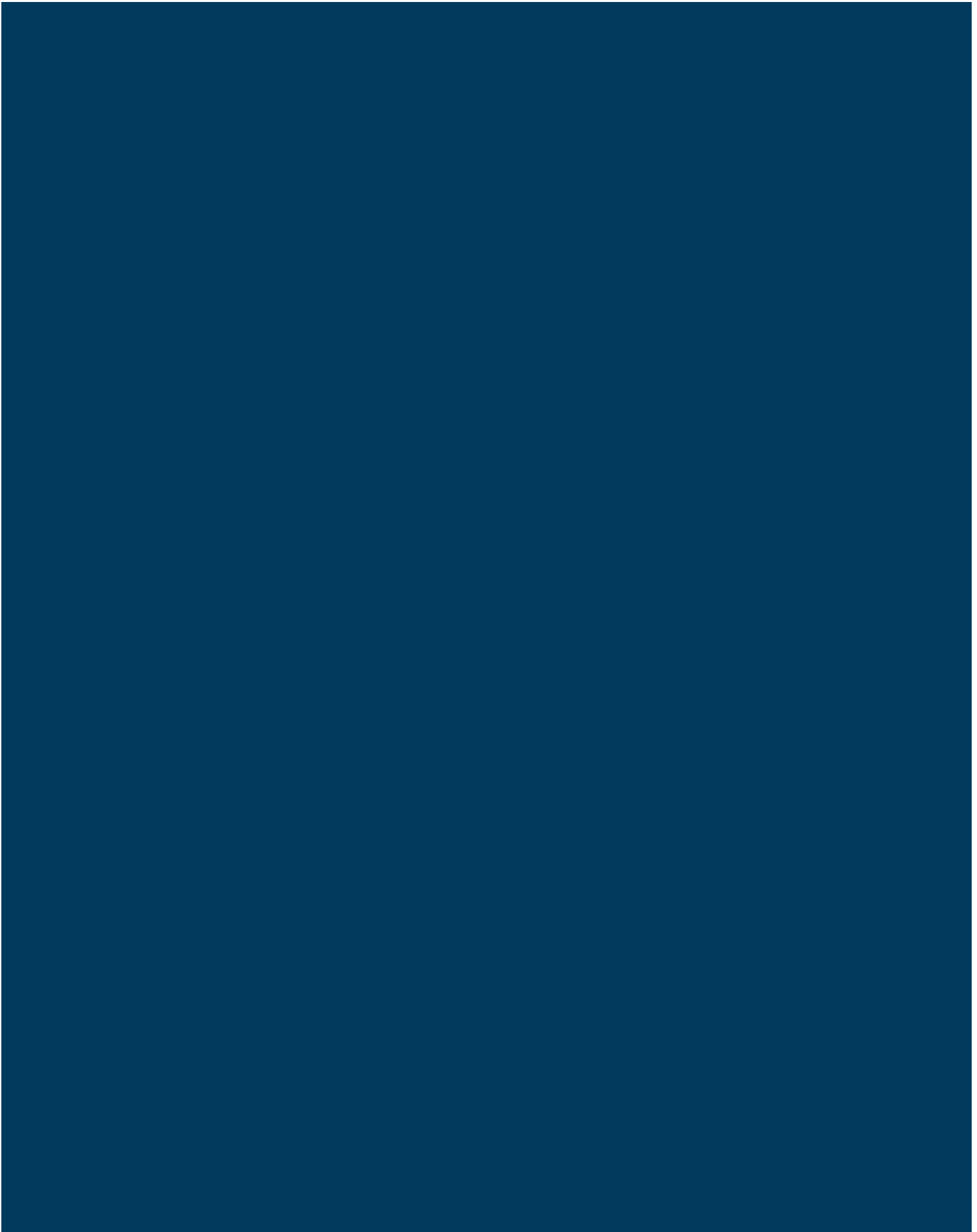
F.3 Knowledge and Experience for Each Support Service Area, Including Anticipated Deliverables

Please describe your knowledge and experience for each item (a-o). Describe the <u>anticipated deliverables for each section</u> and how your team will perform the work involved toward meeting the requirements in the following Support Service Areas:
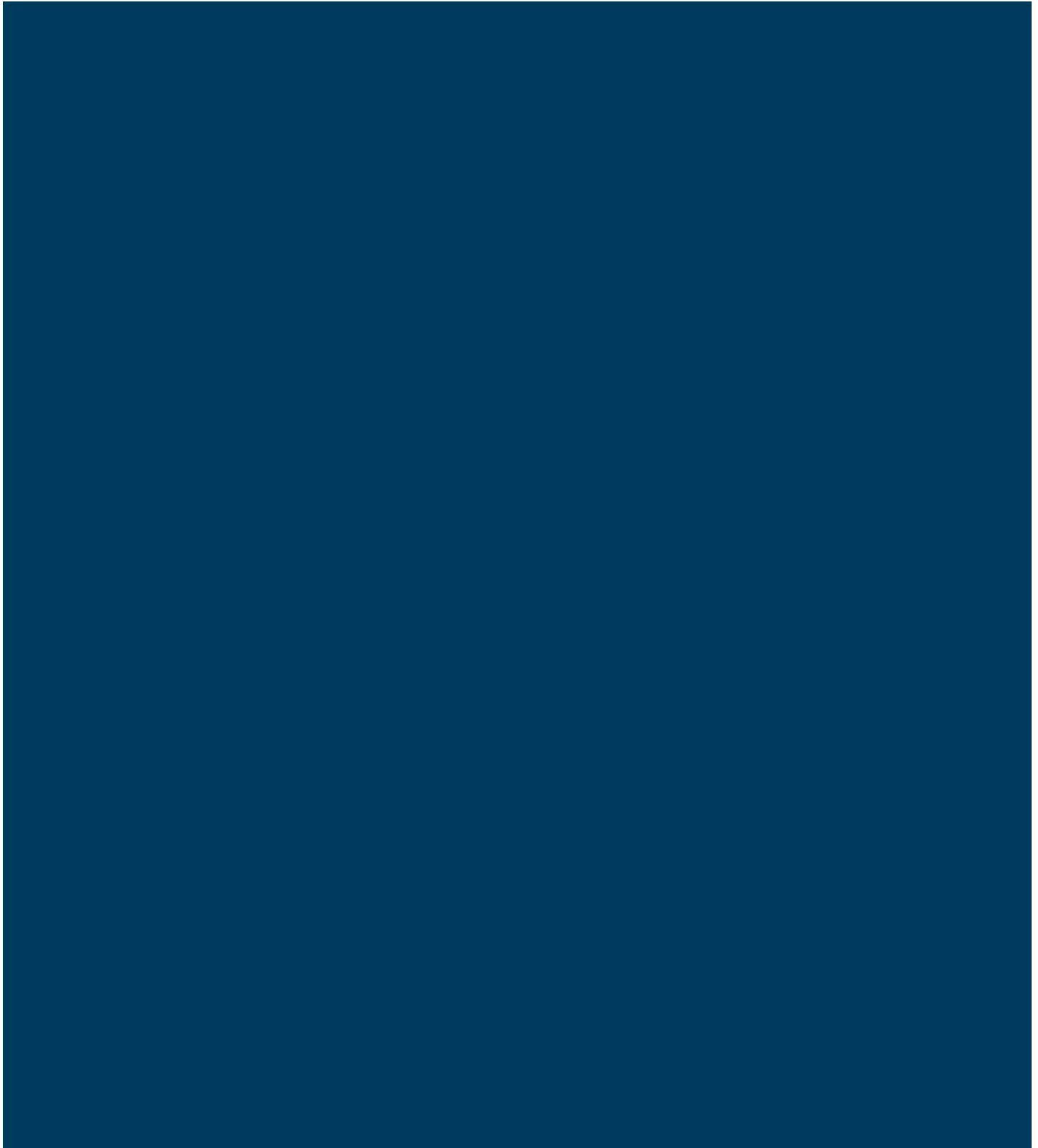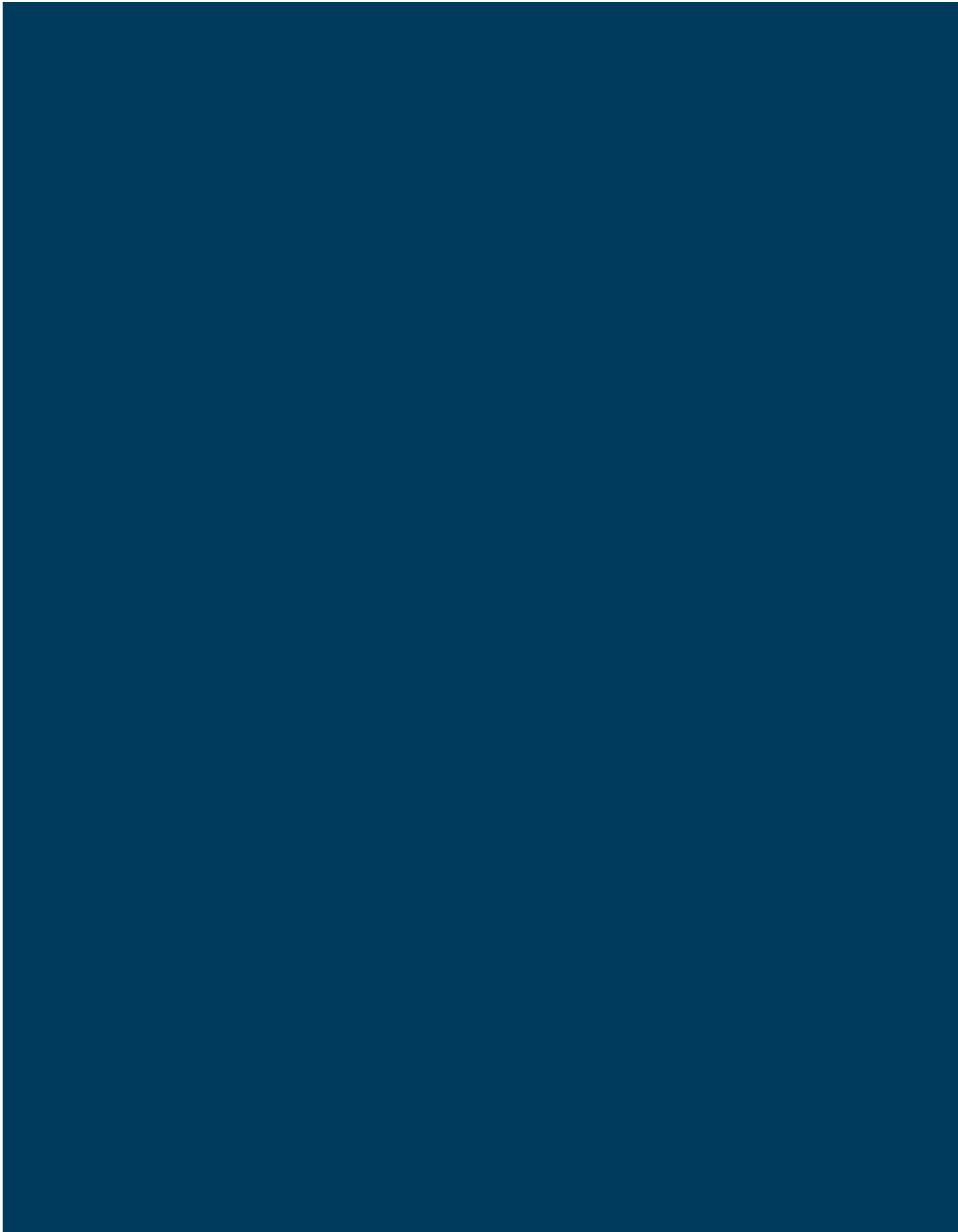
F.3.a   Procurement Support

a.   Procurement Support
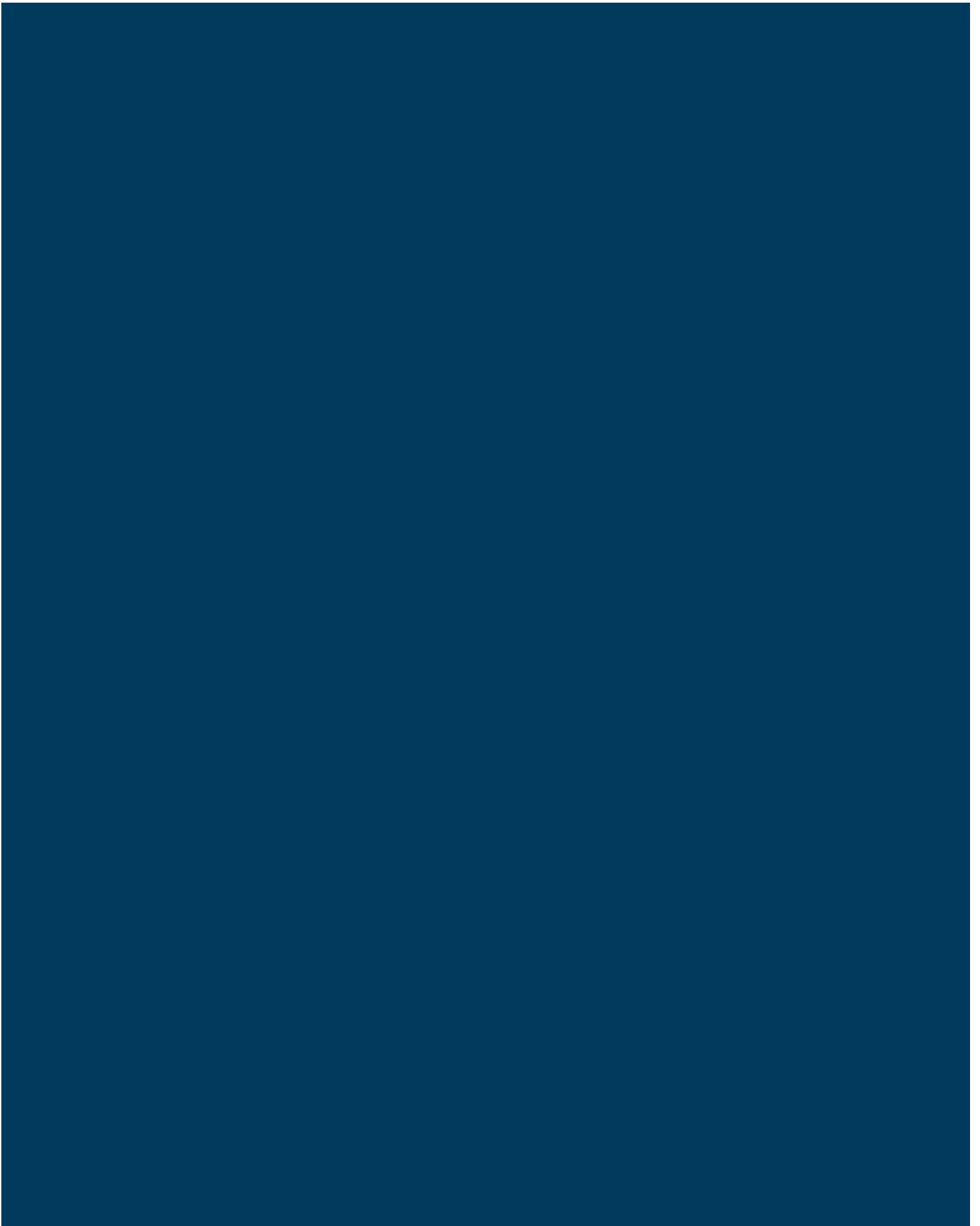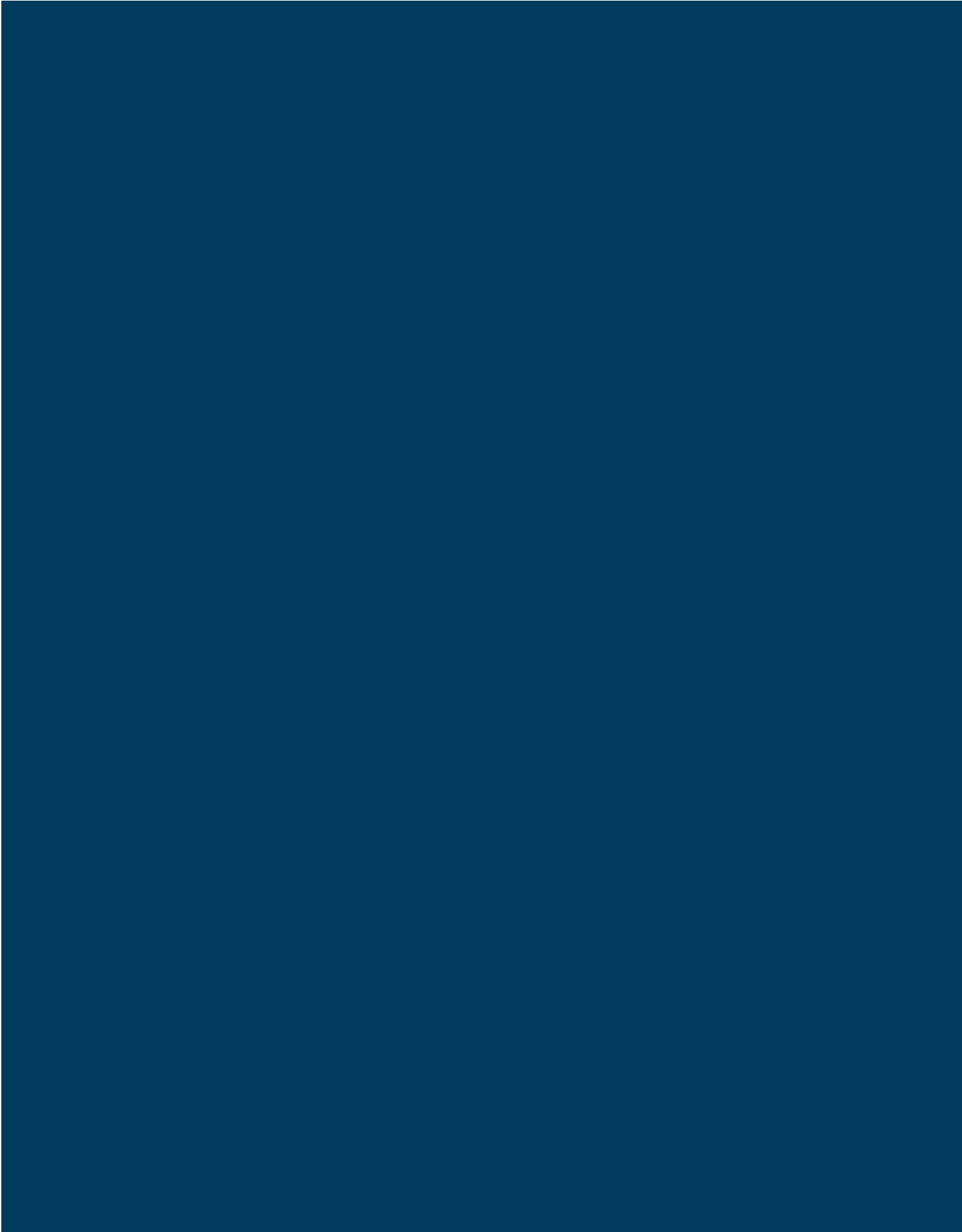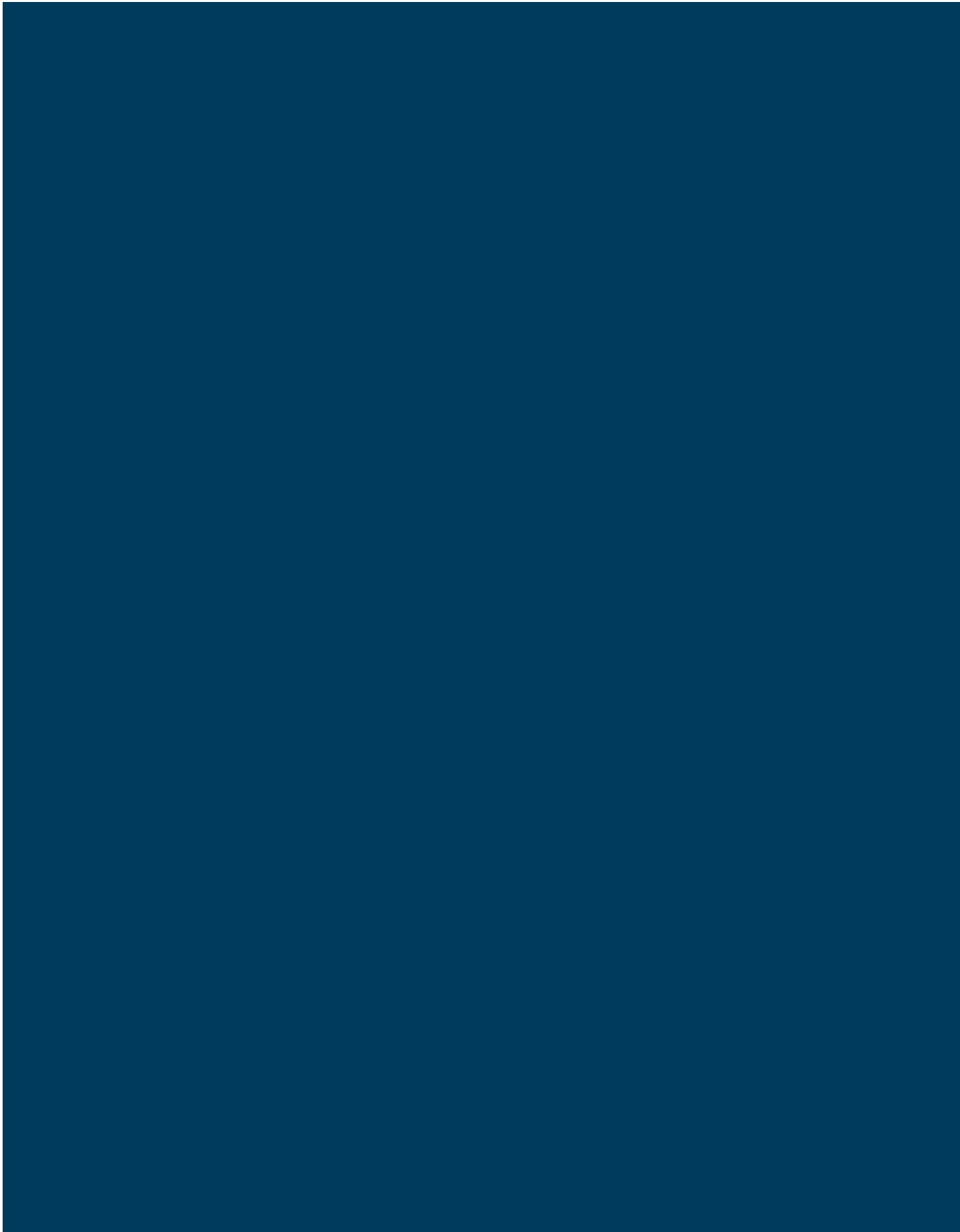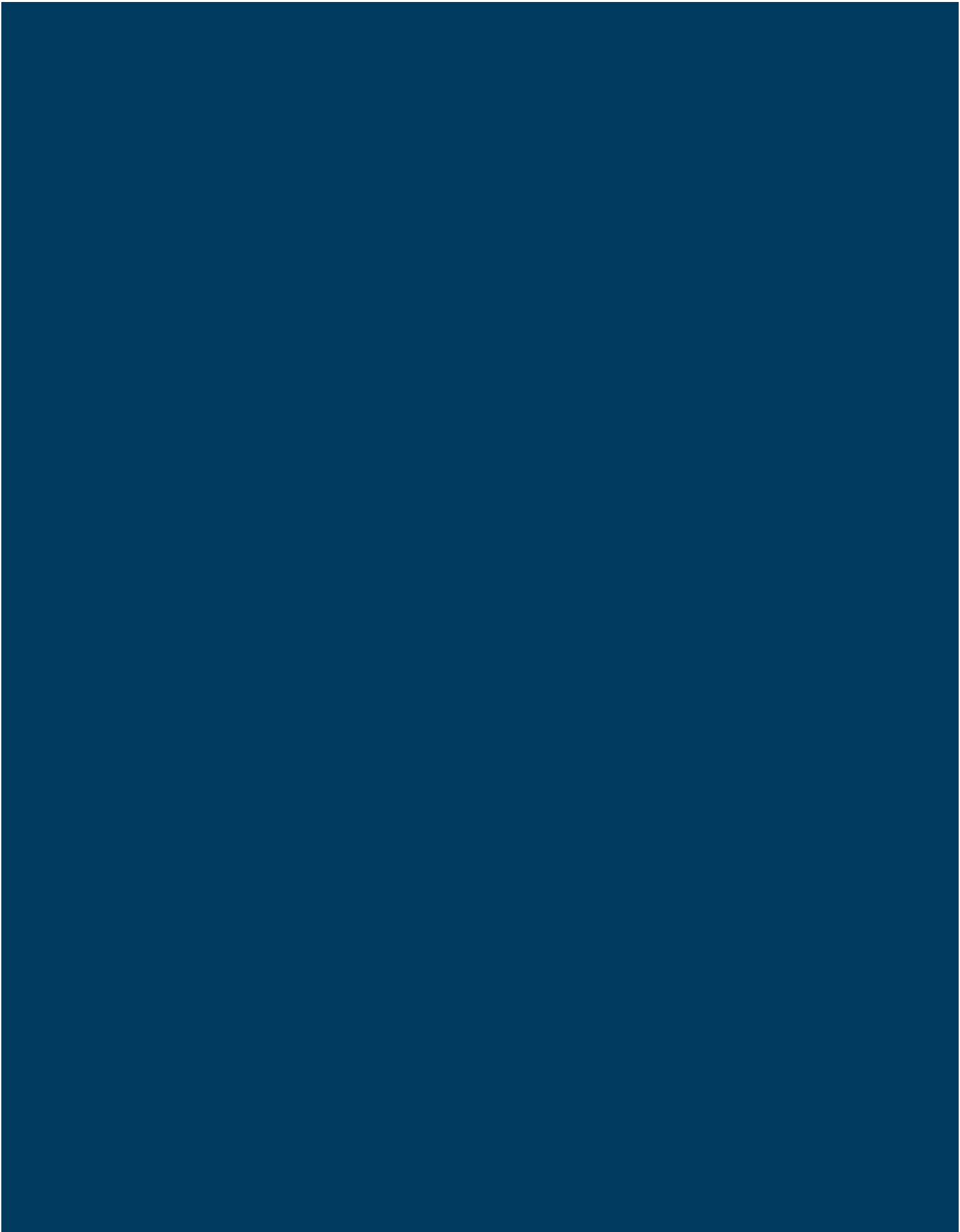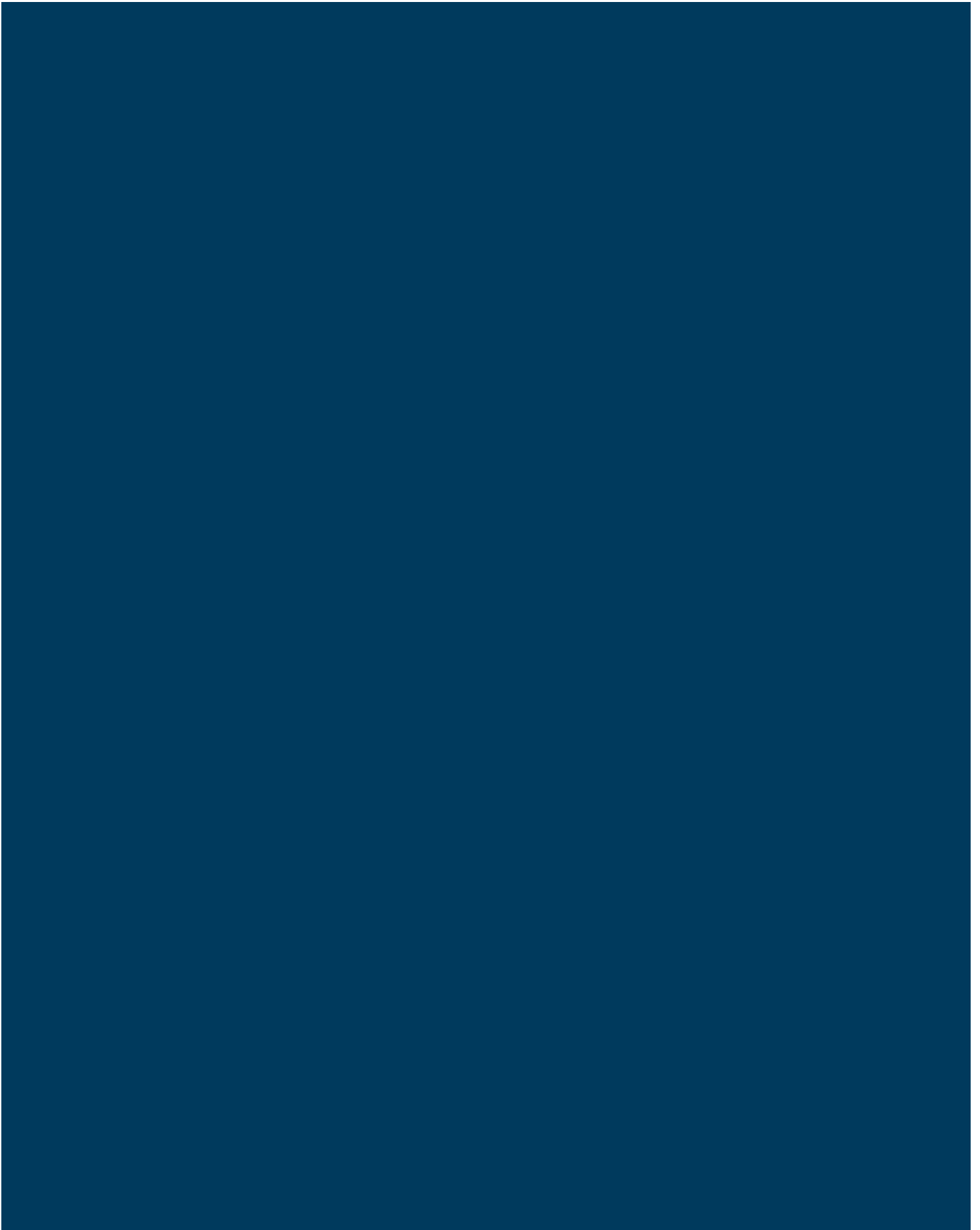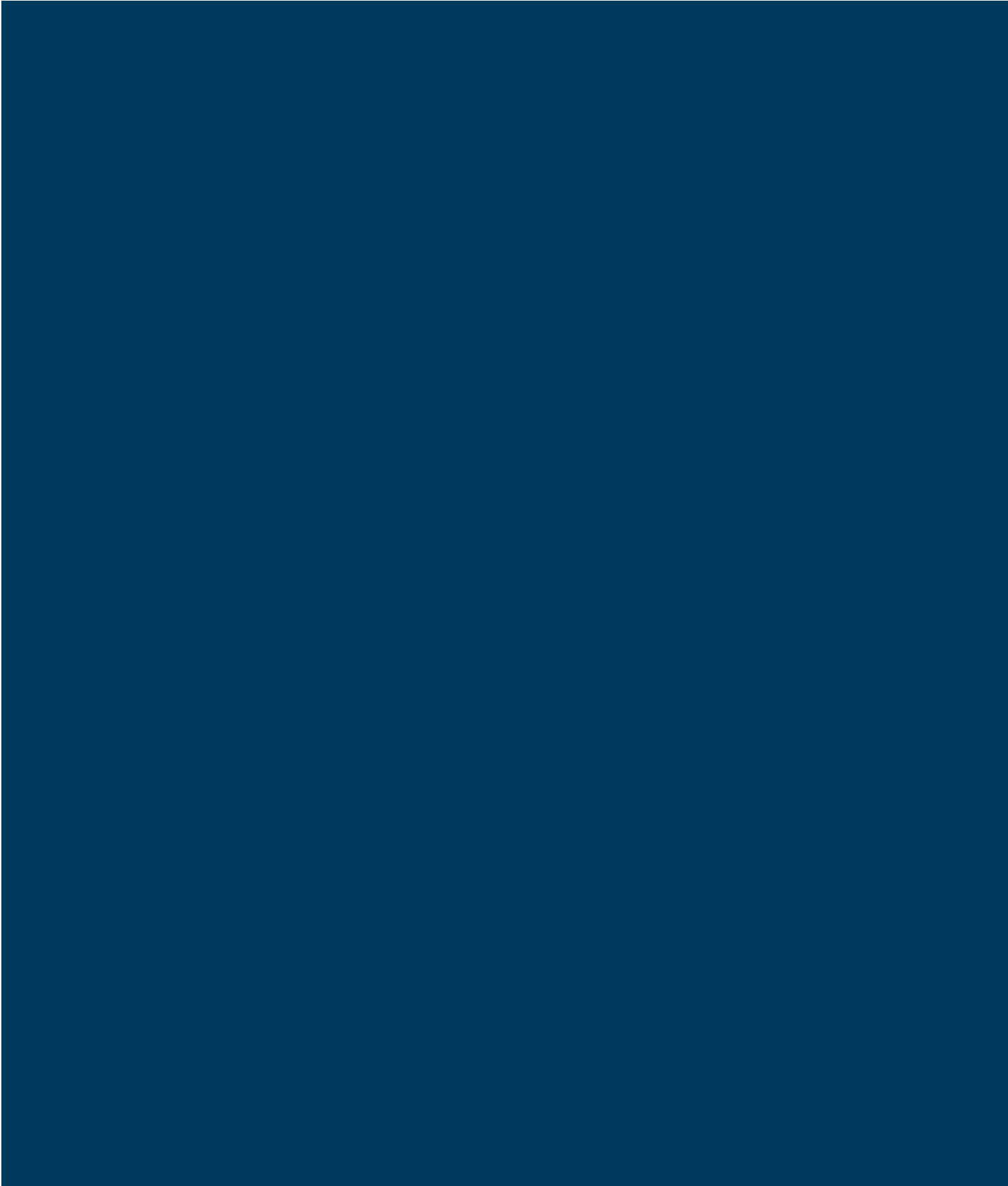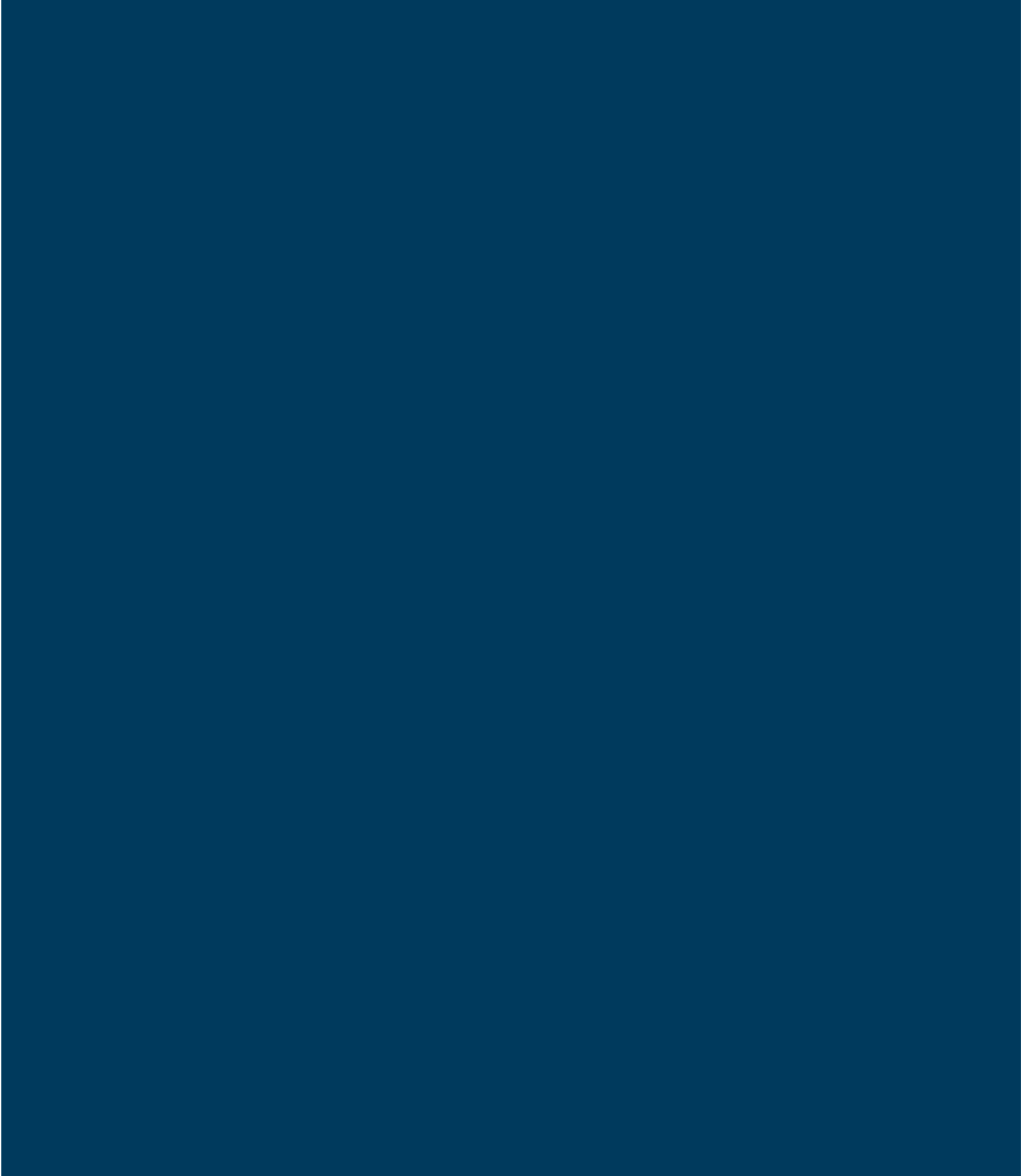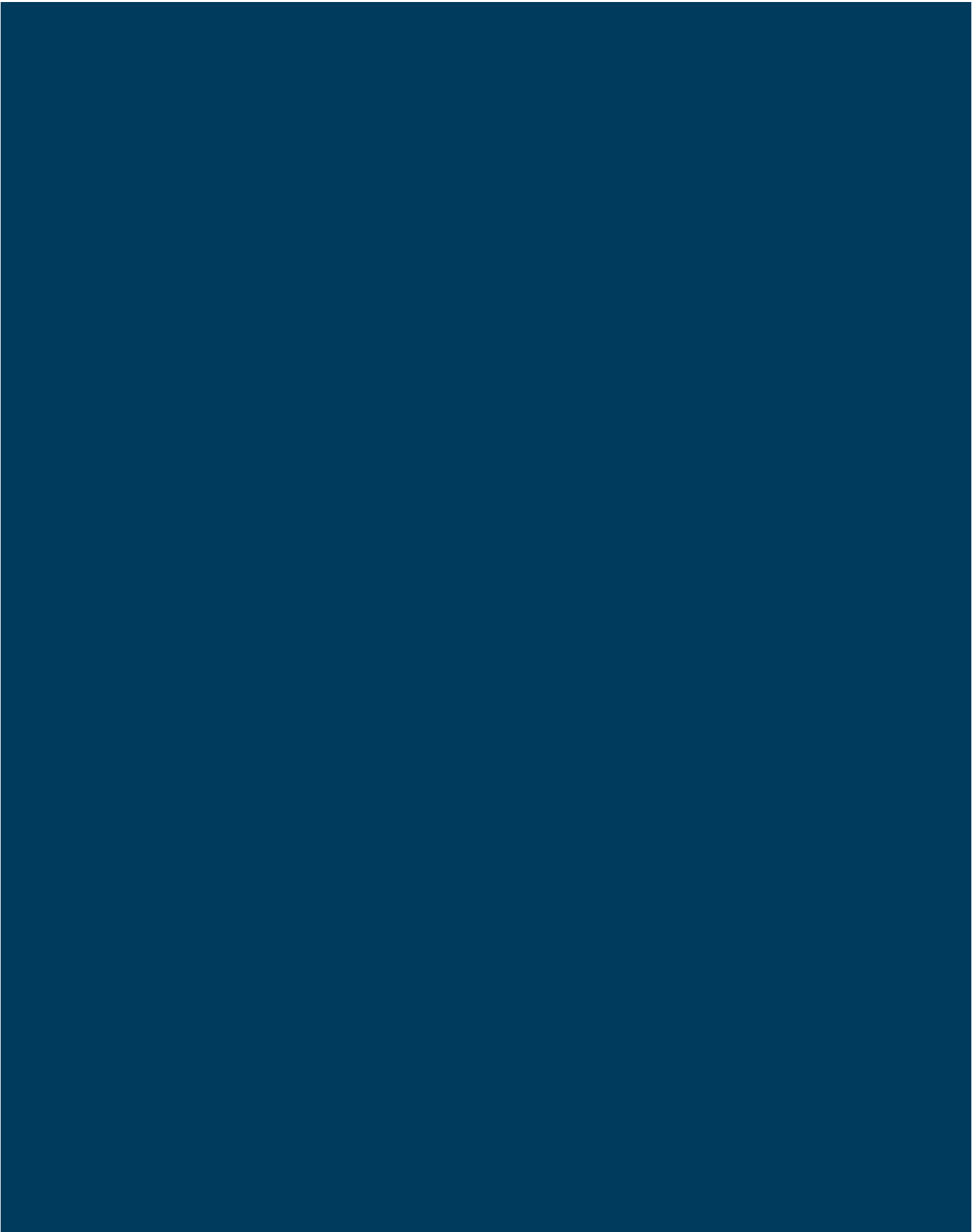
d.   MES Streamlined Modular Certification (SMC) (MES Outcomes-Based Certification (OBC) Support). How many and which SMC certification have you worked on?
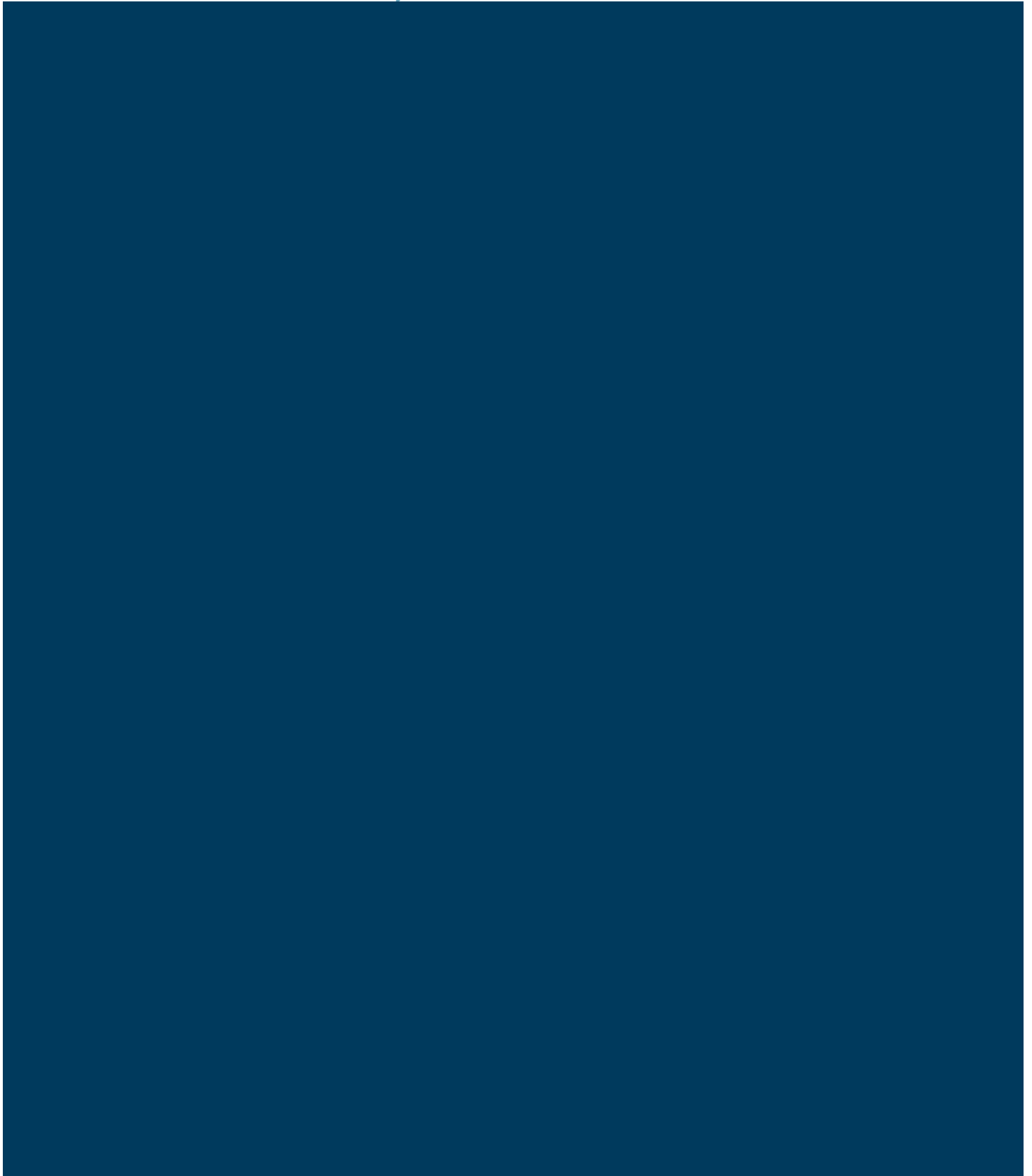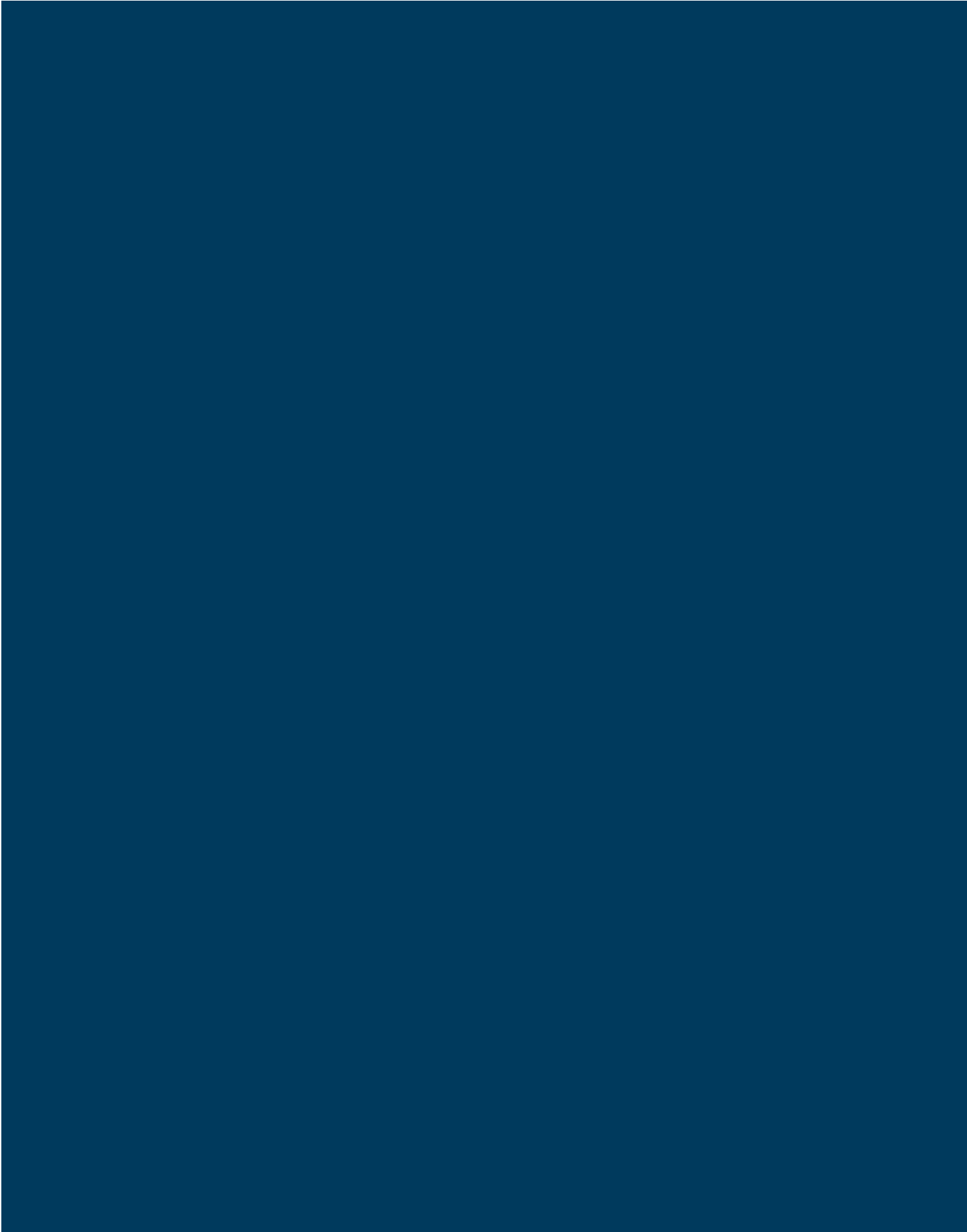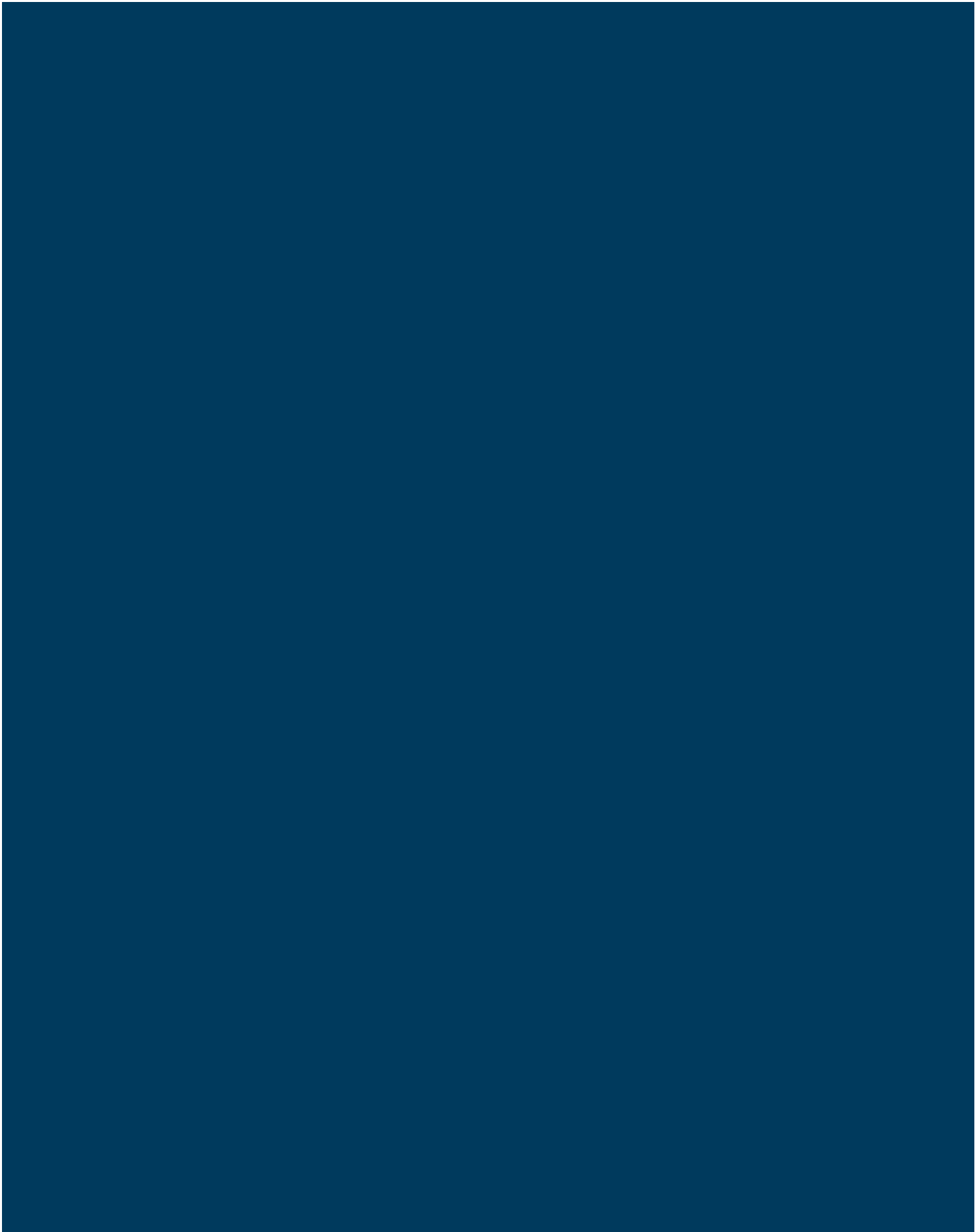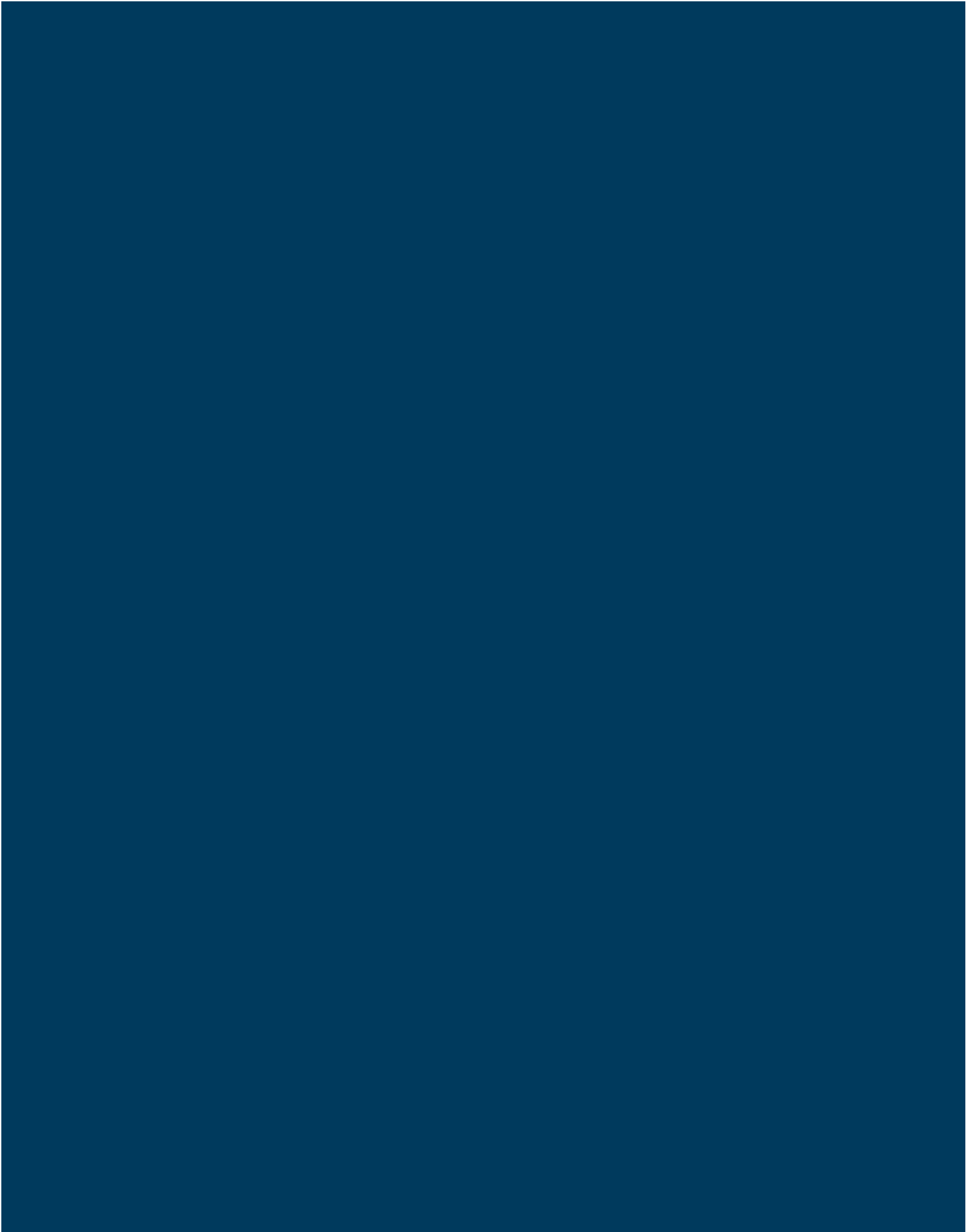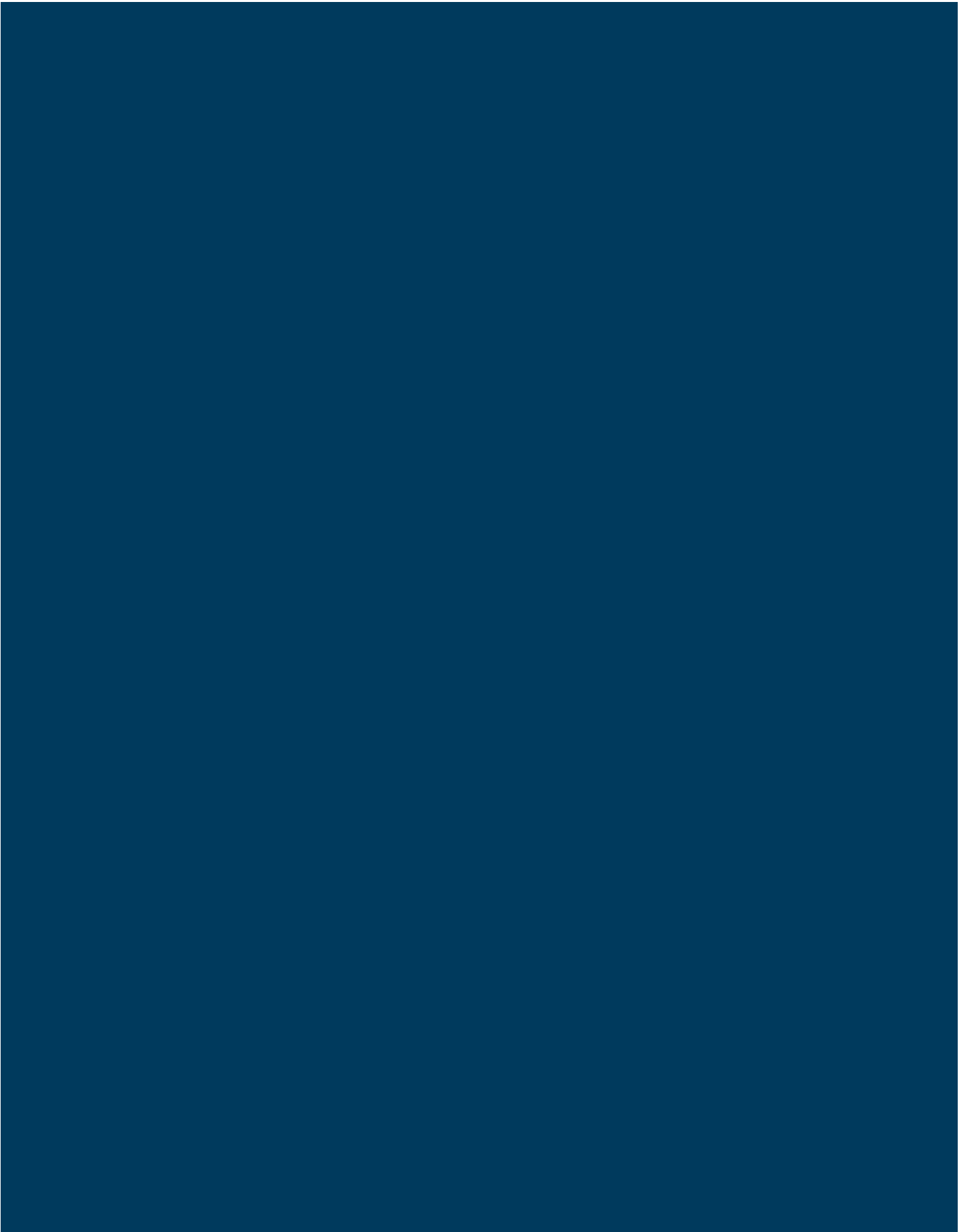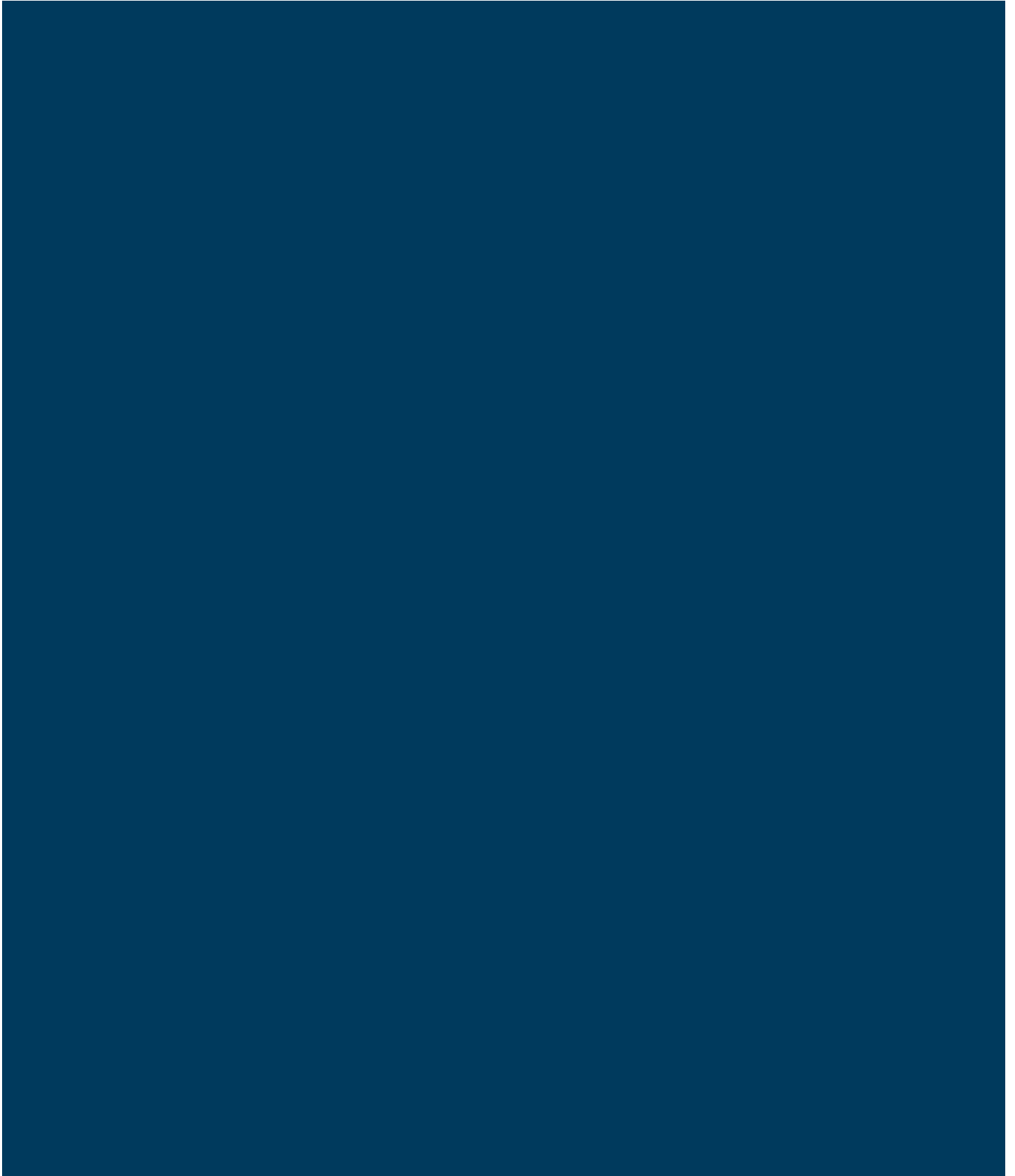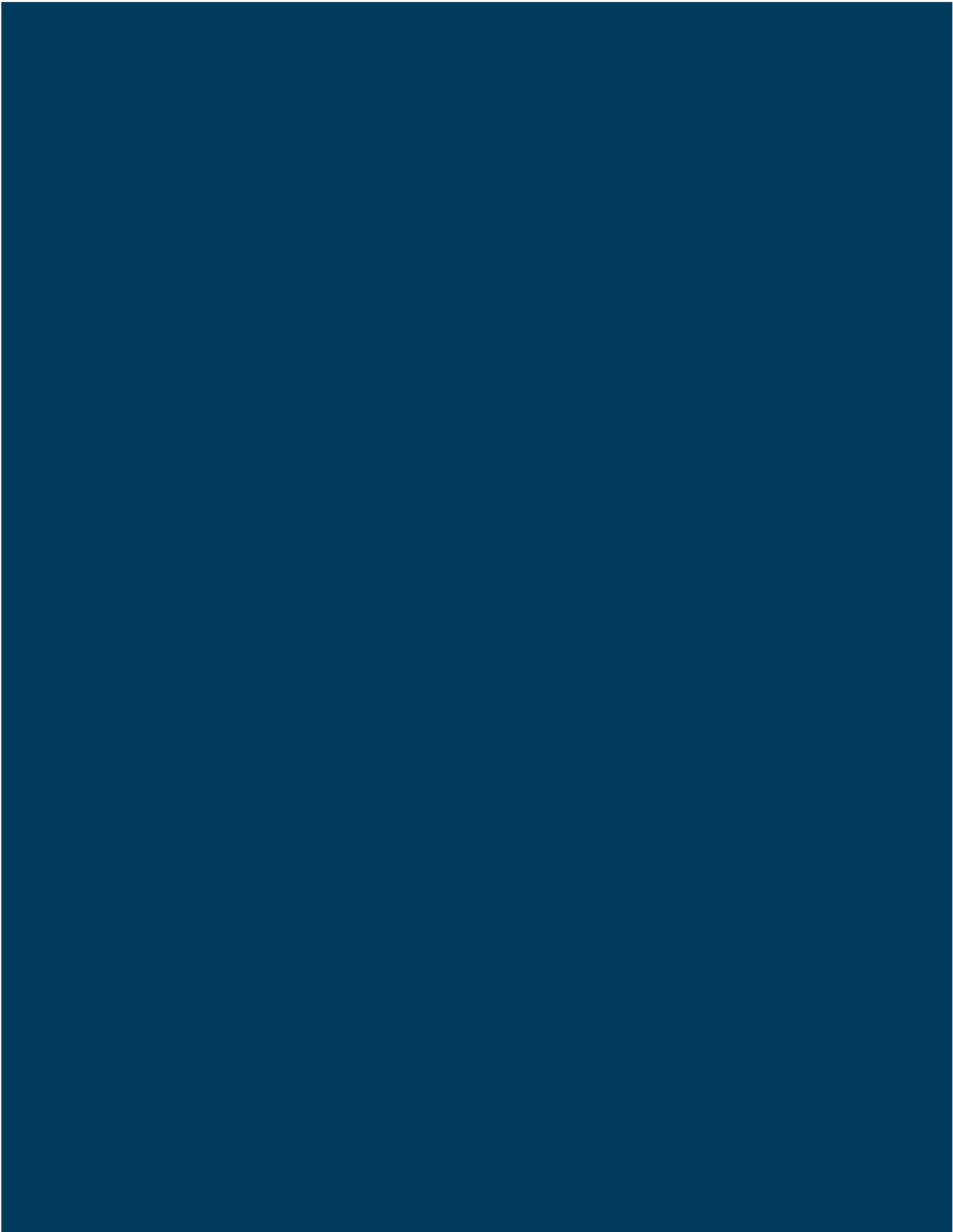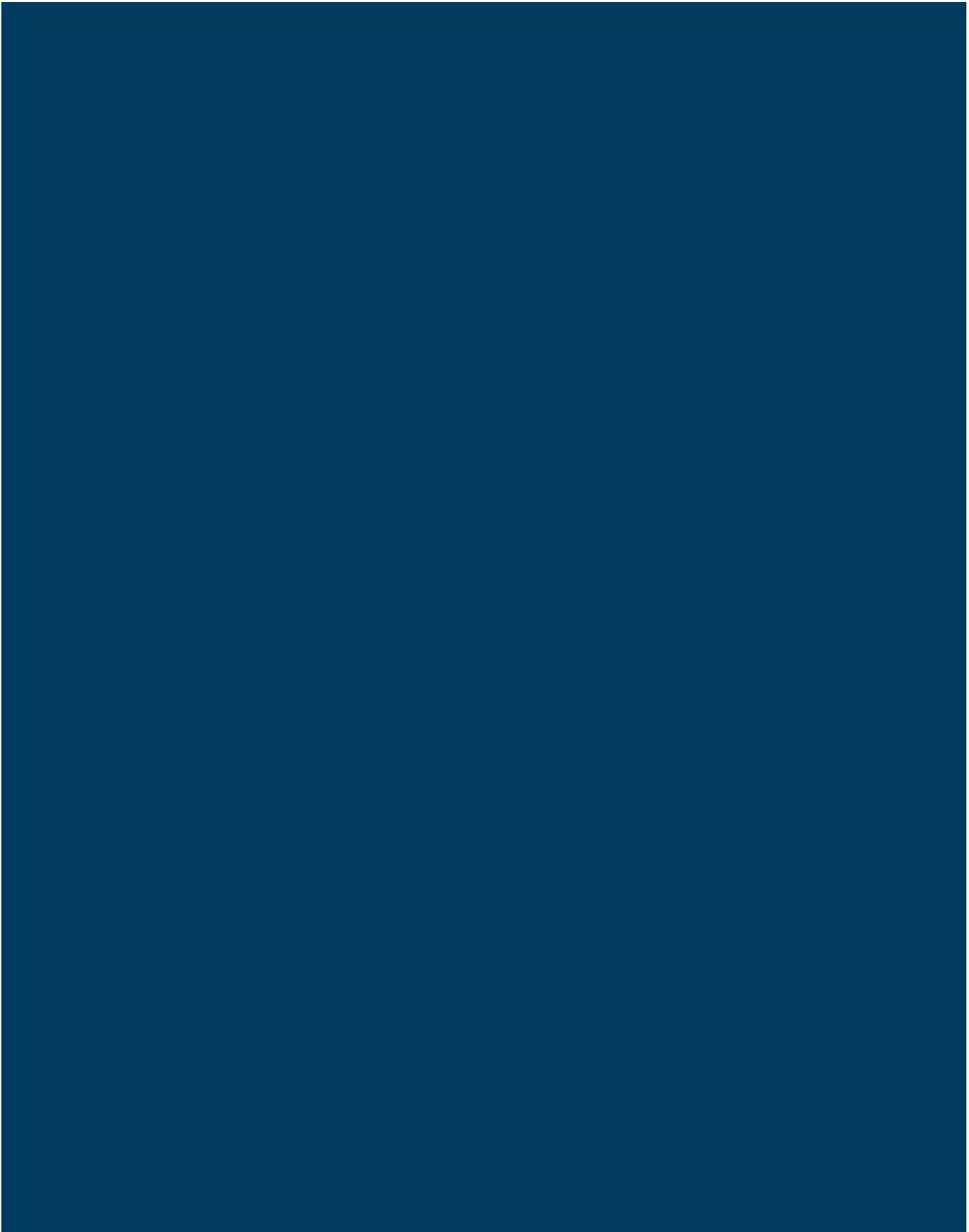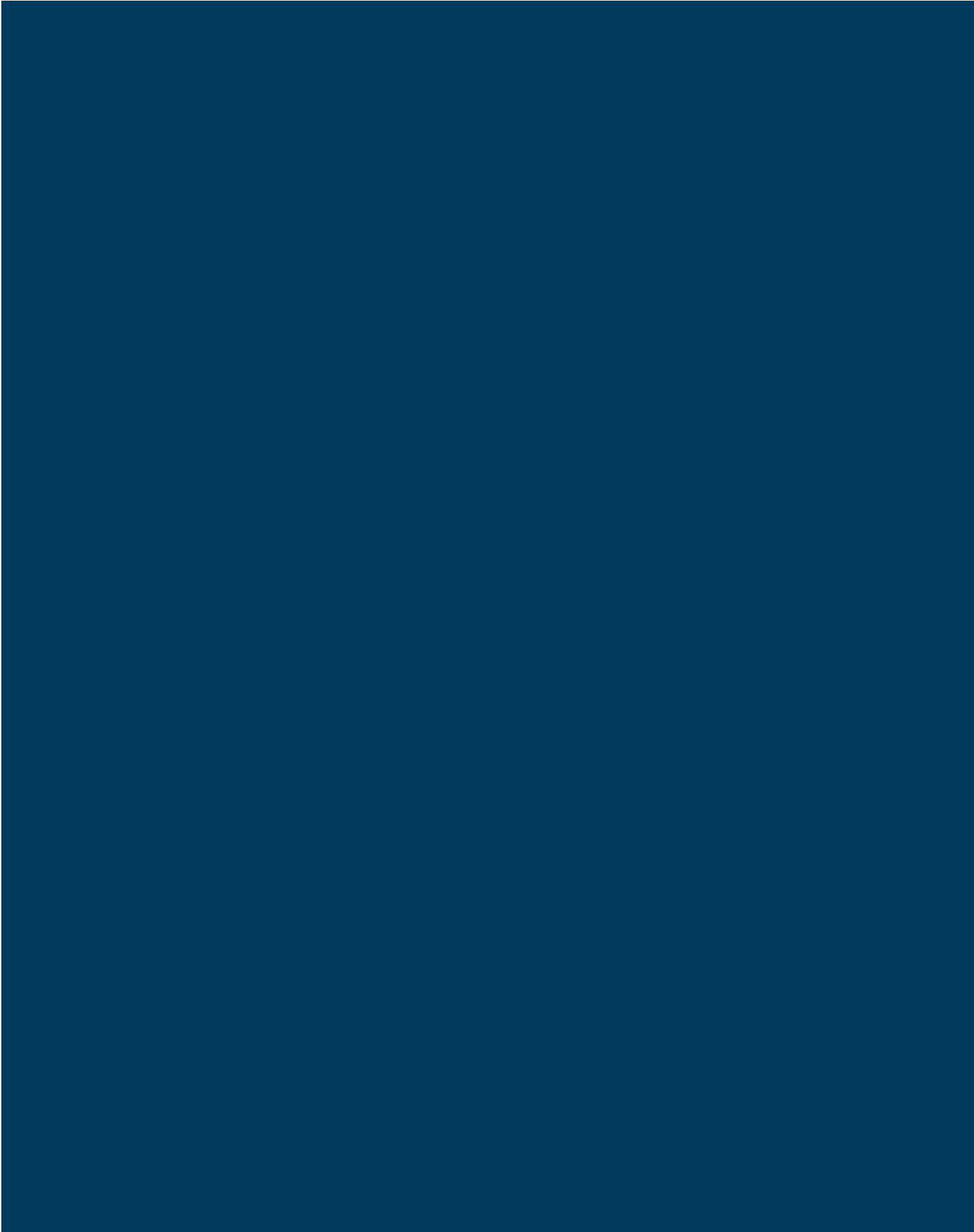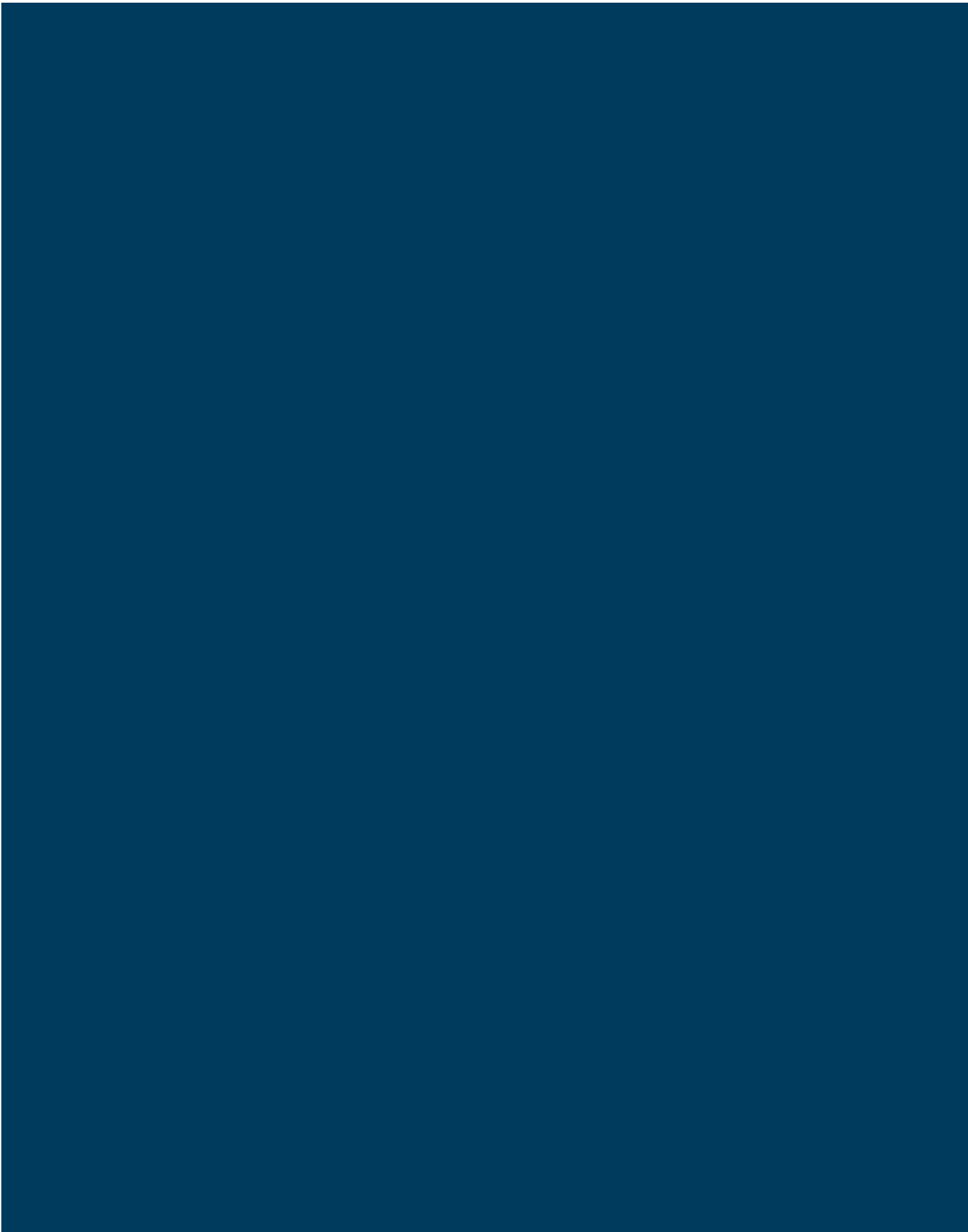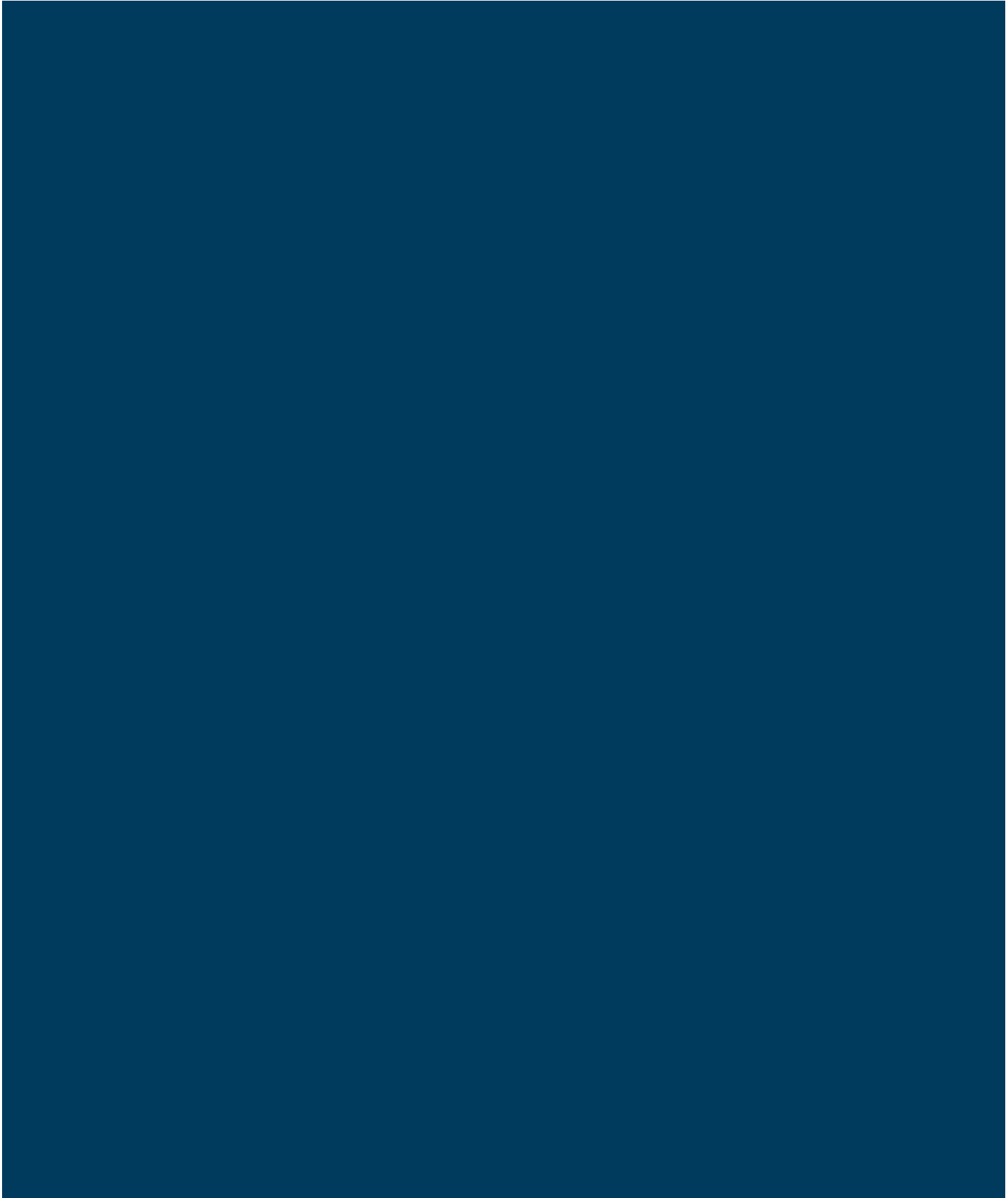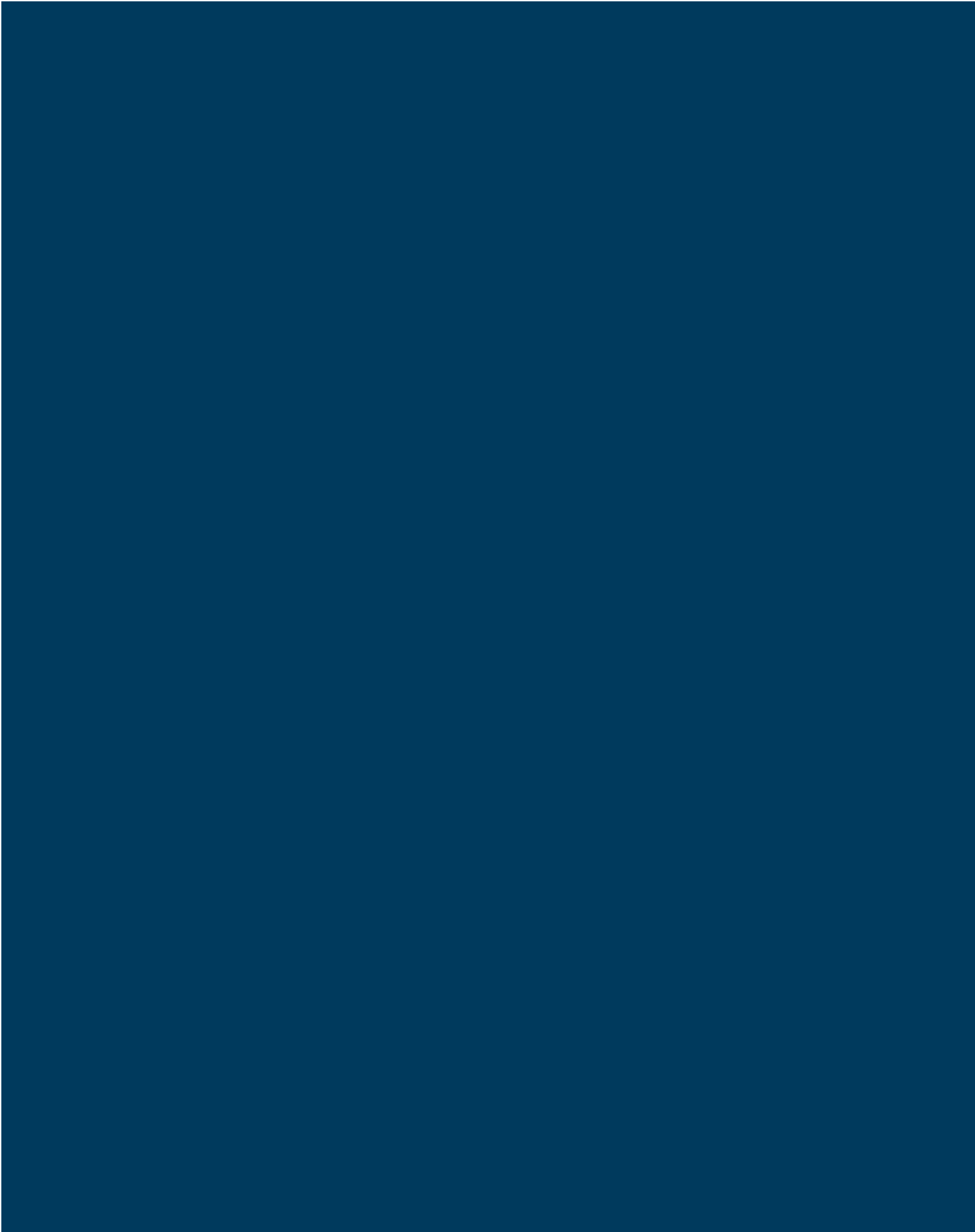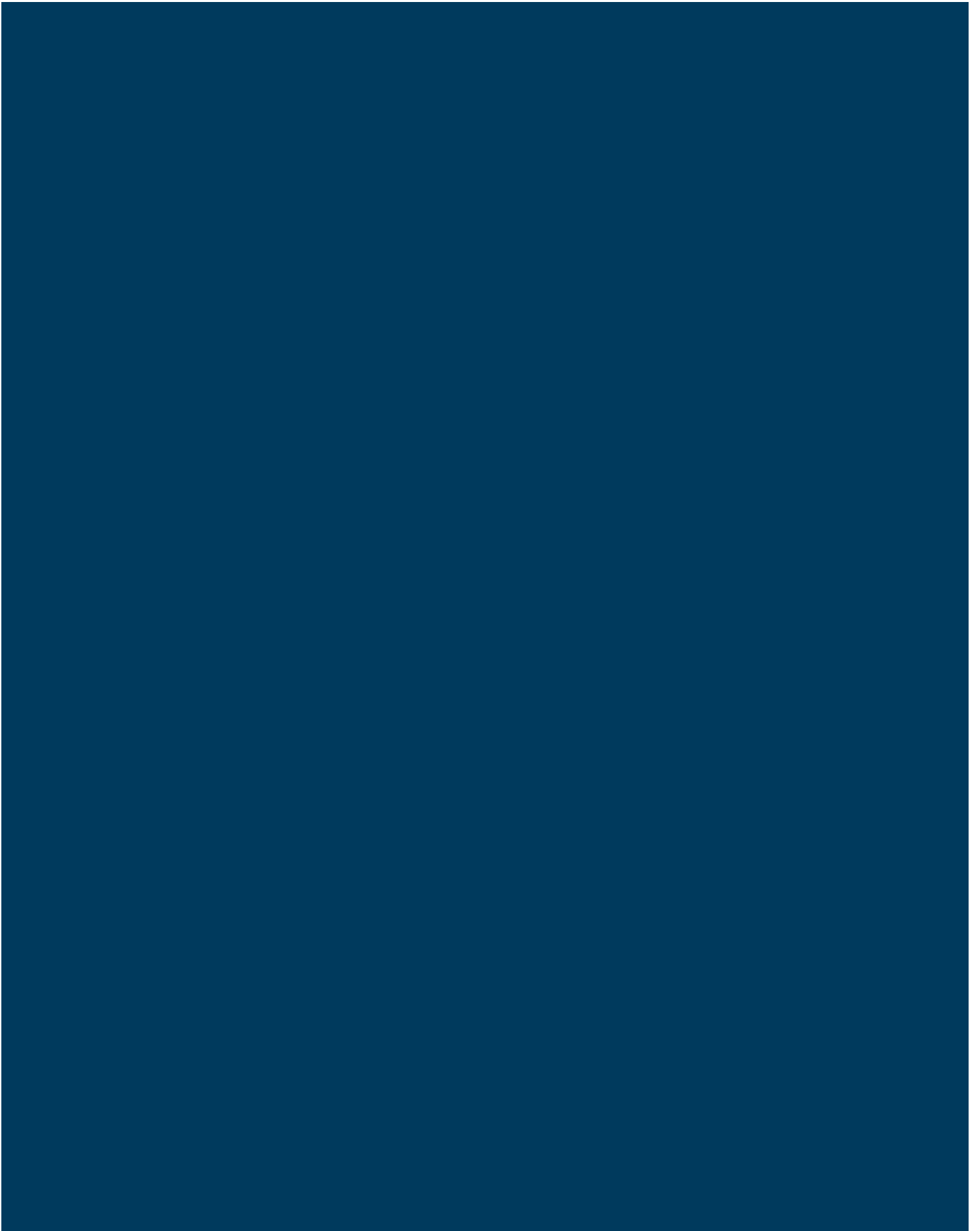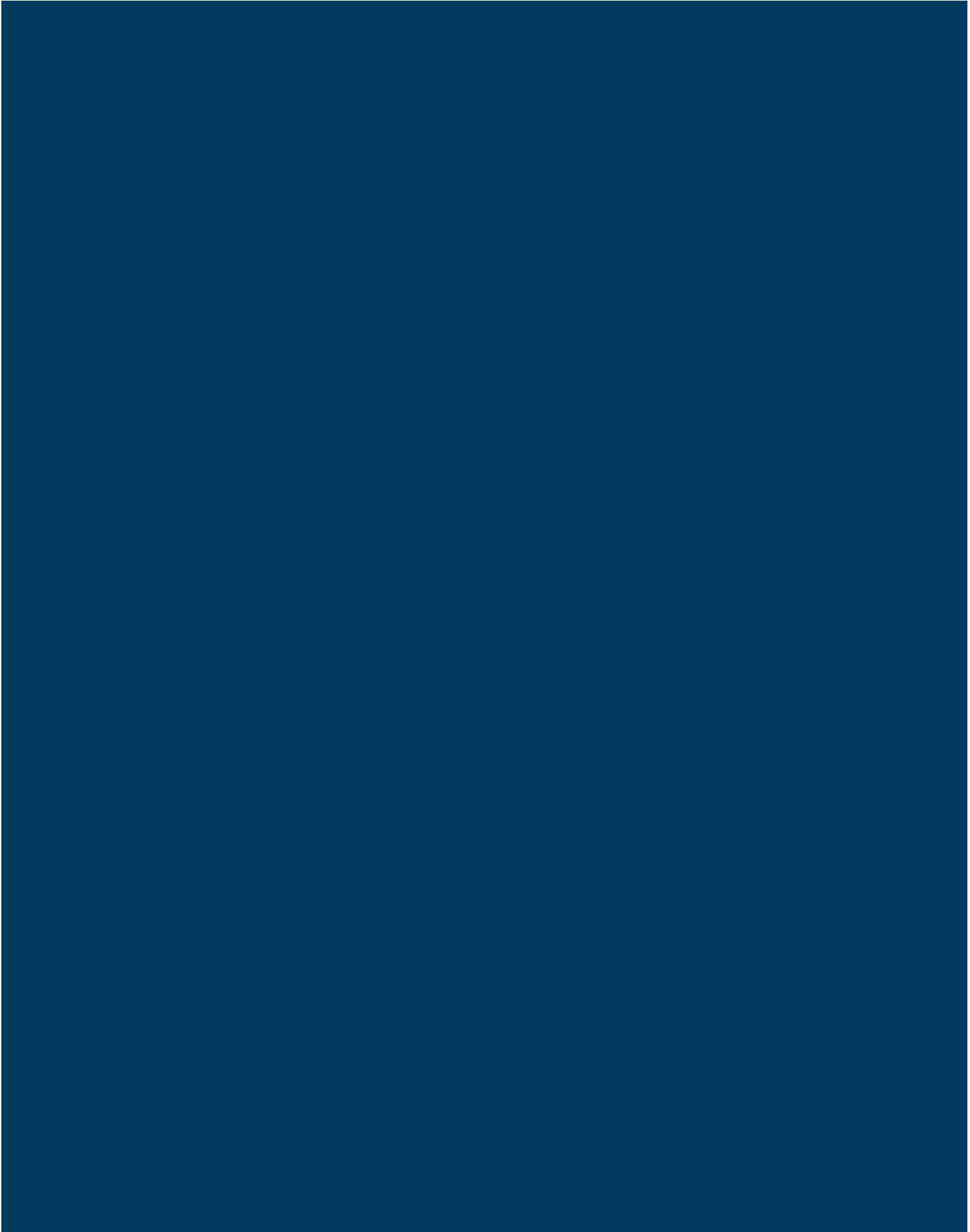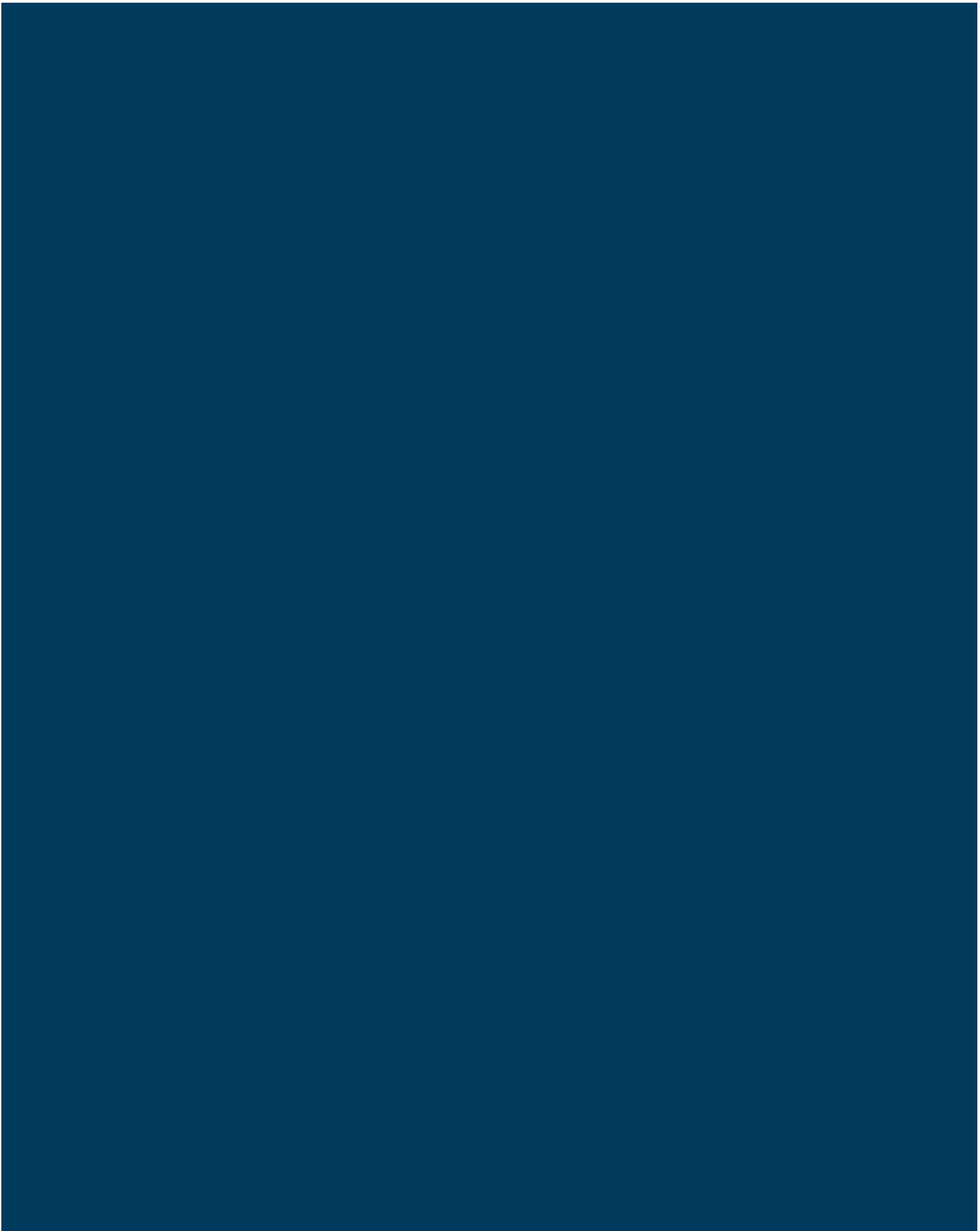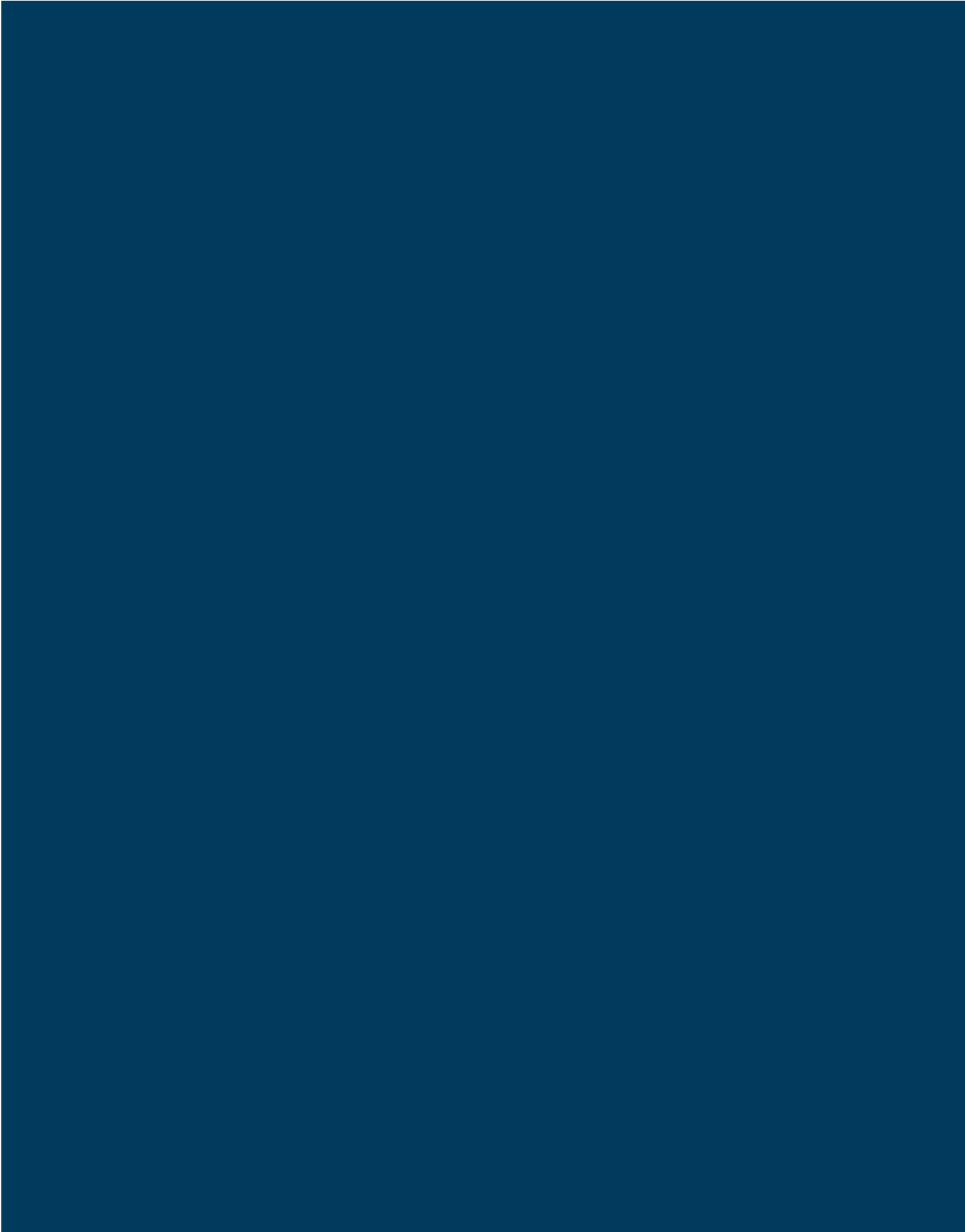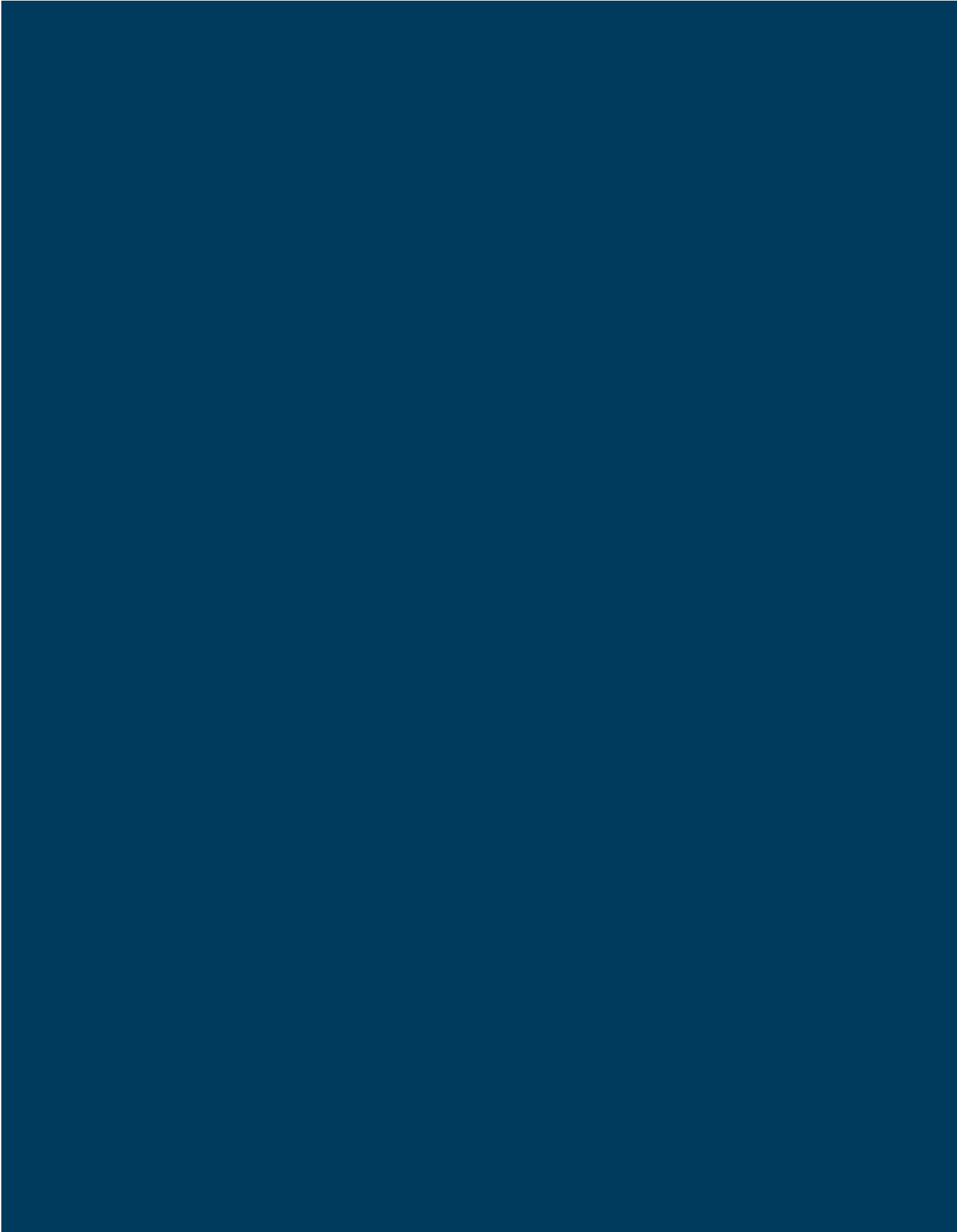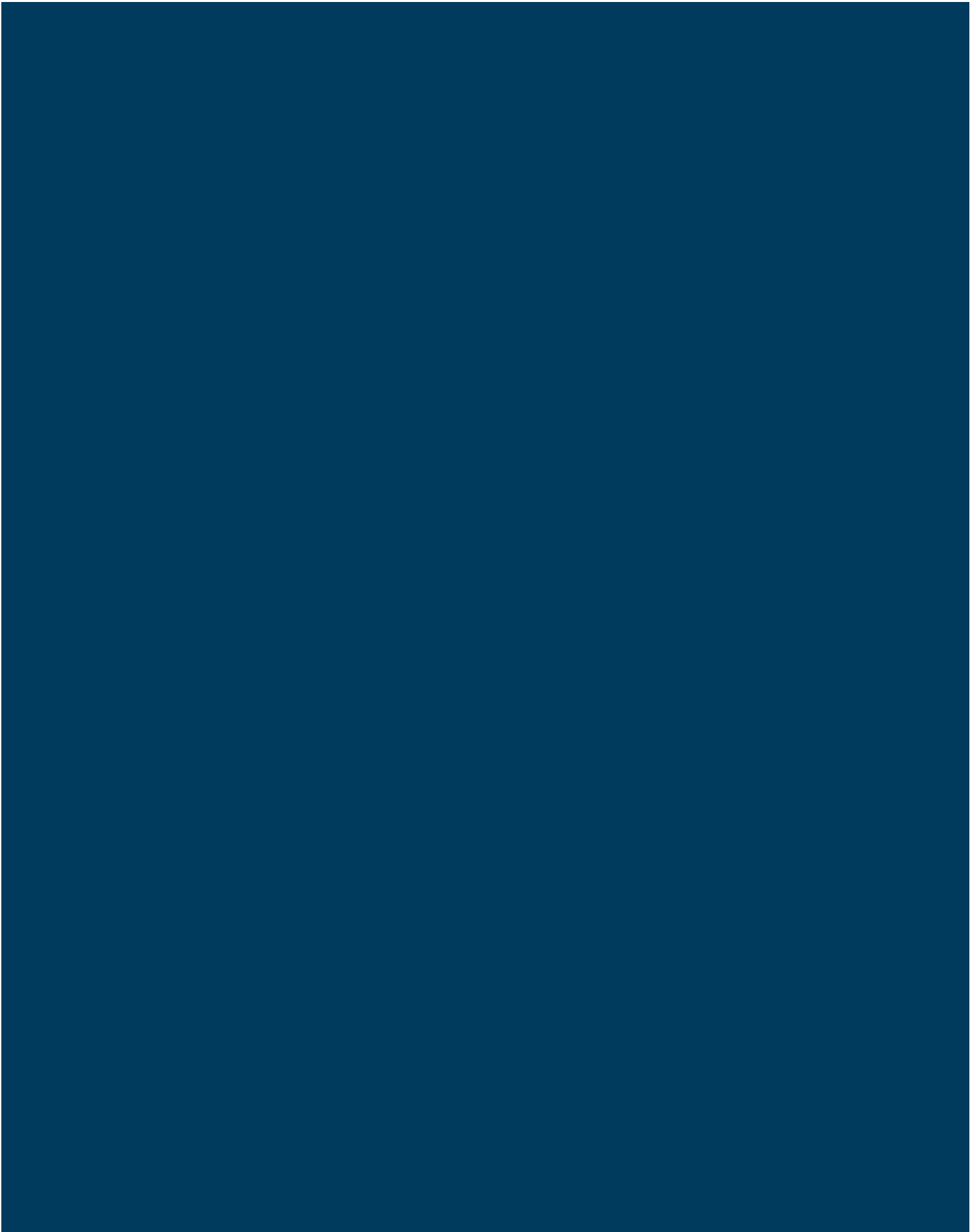
F.3.g   Spenddown Implementation Support

g.   Spenddown Implementation Support
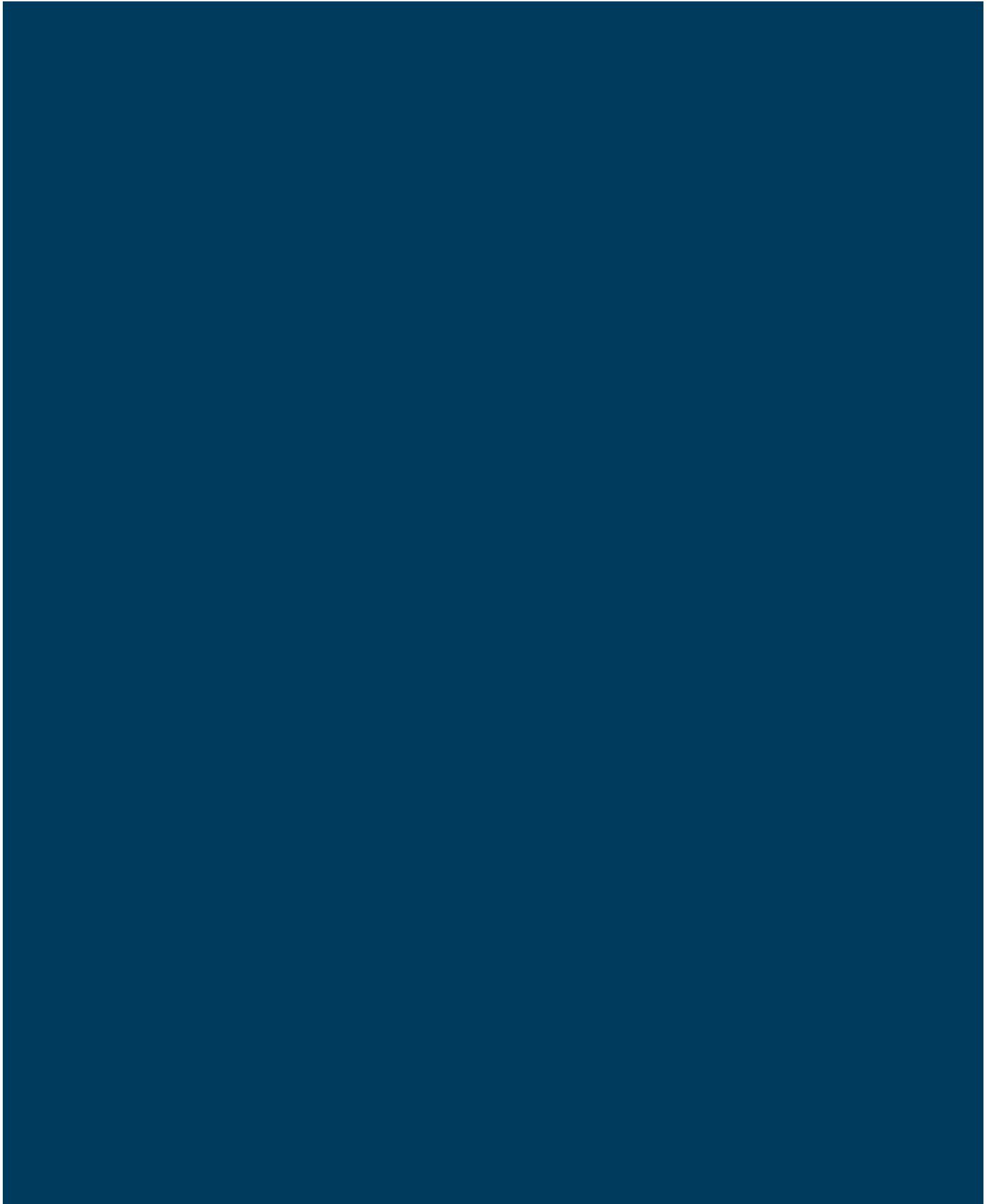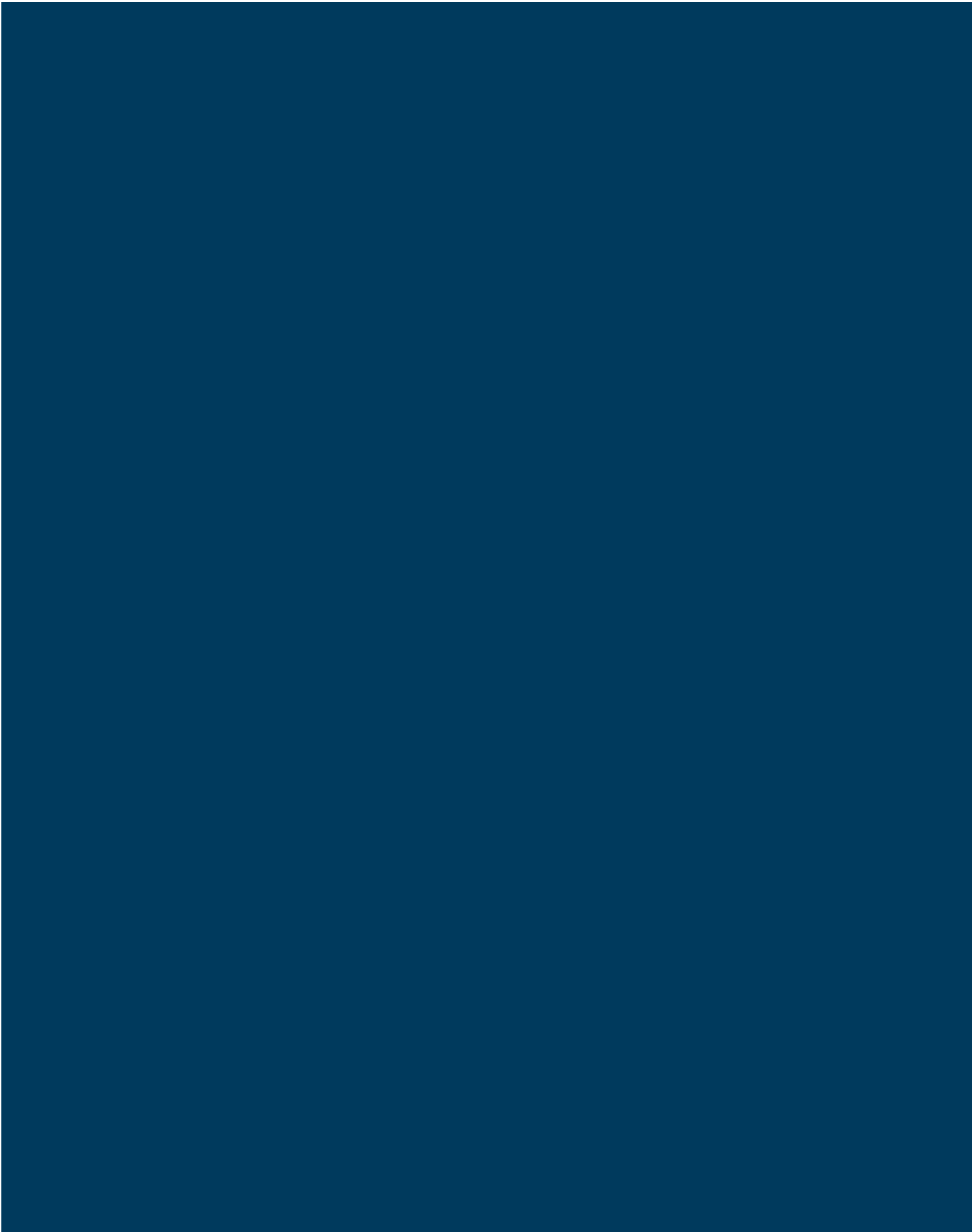
F.3.h   State Plan Amendments (SPA) Support

h.   State Plan Amendments (SPA) Support
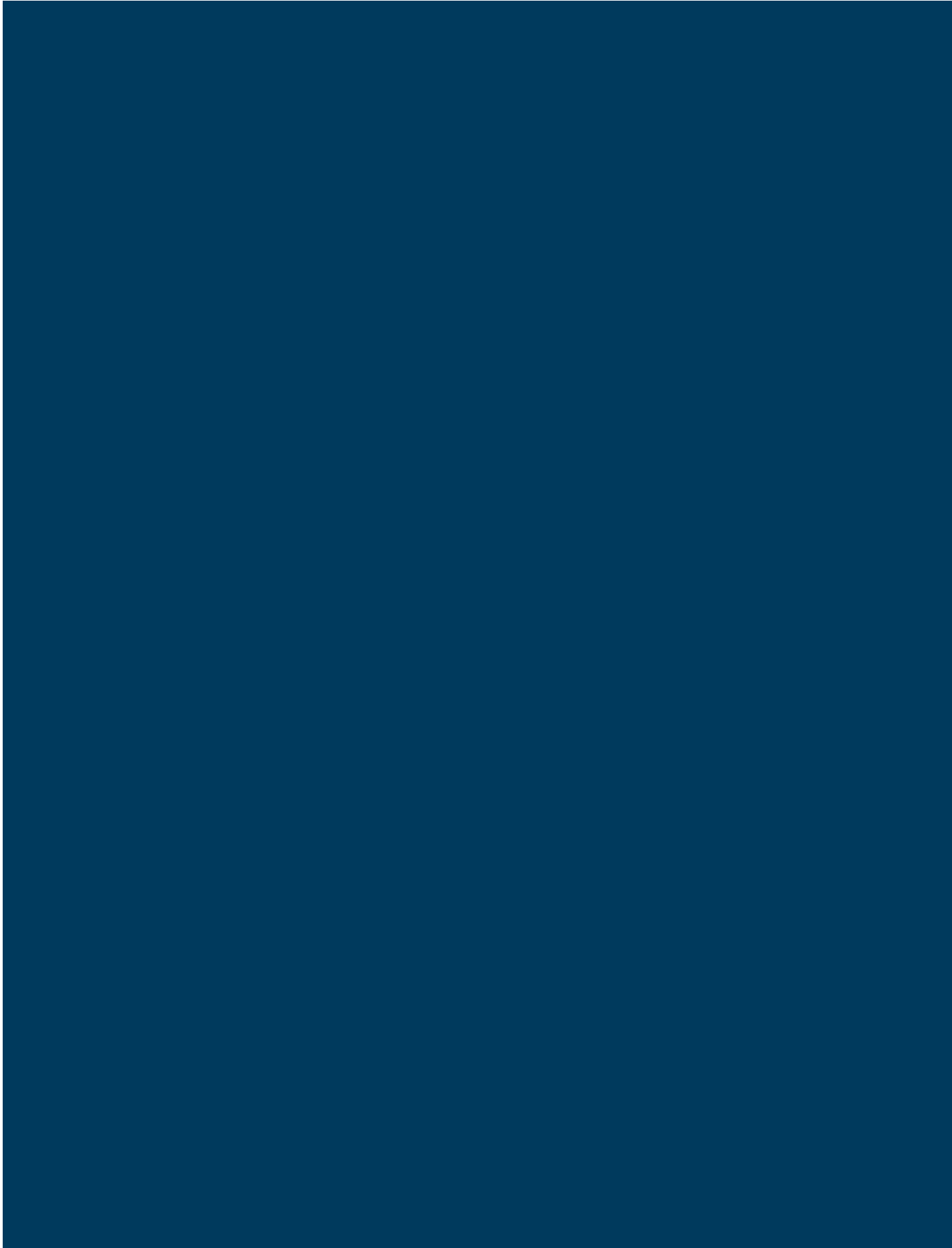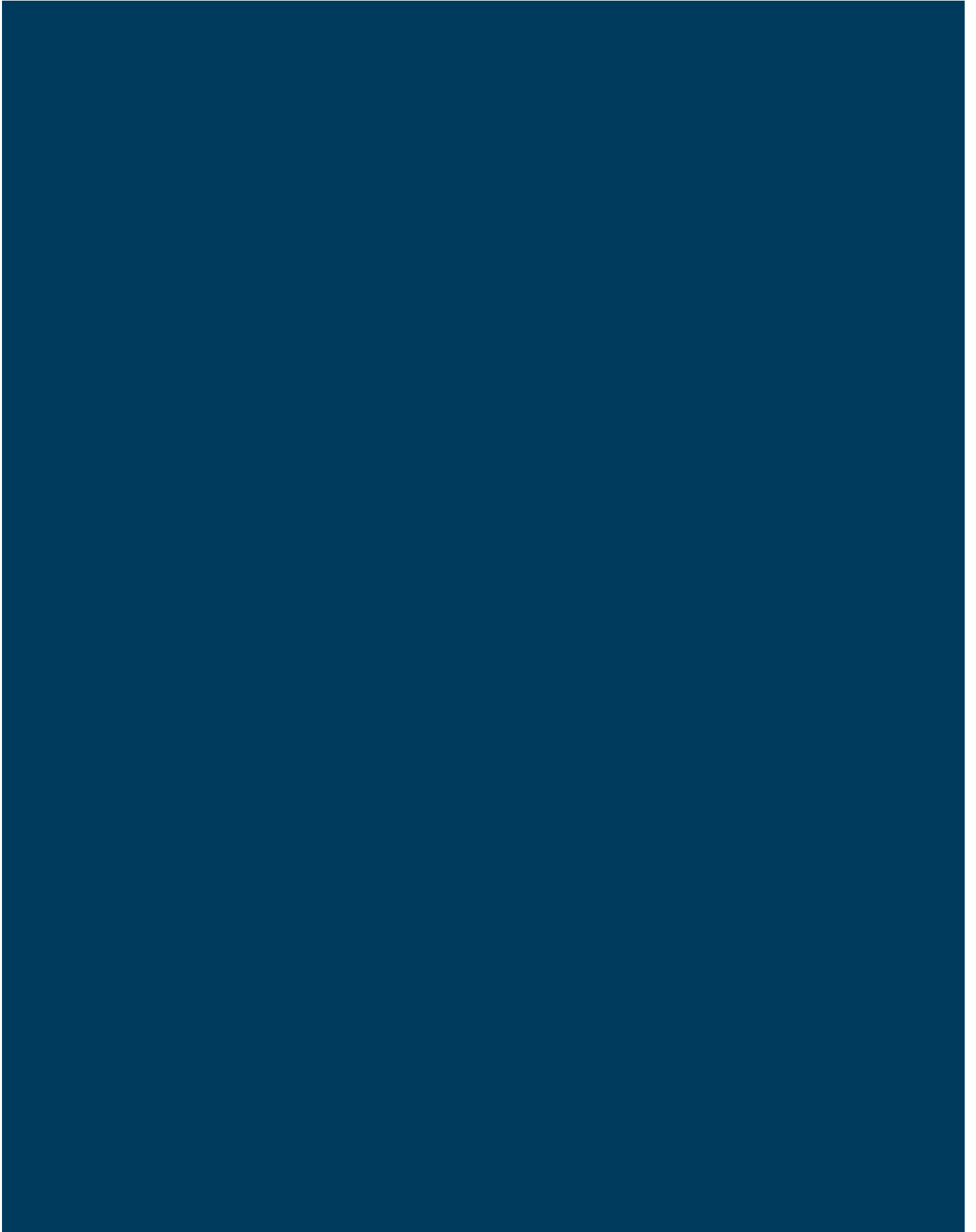
F.3.i   Money Follows the Person (MFP) Implementation Planning Support

i.   Money Follows the Person (MFP) Implementation Planning Support
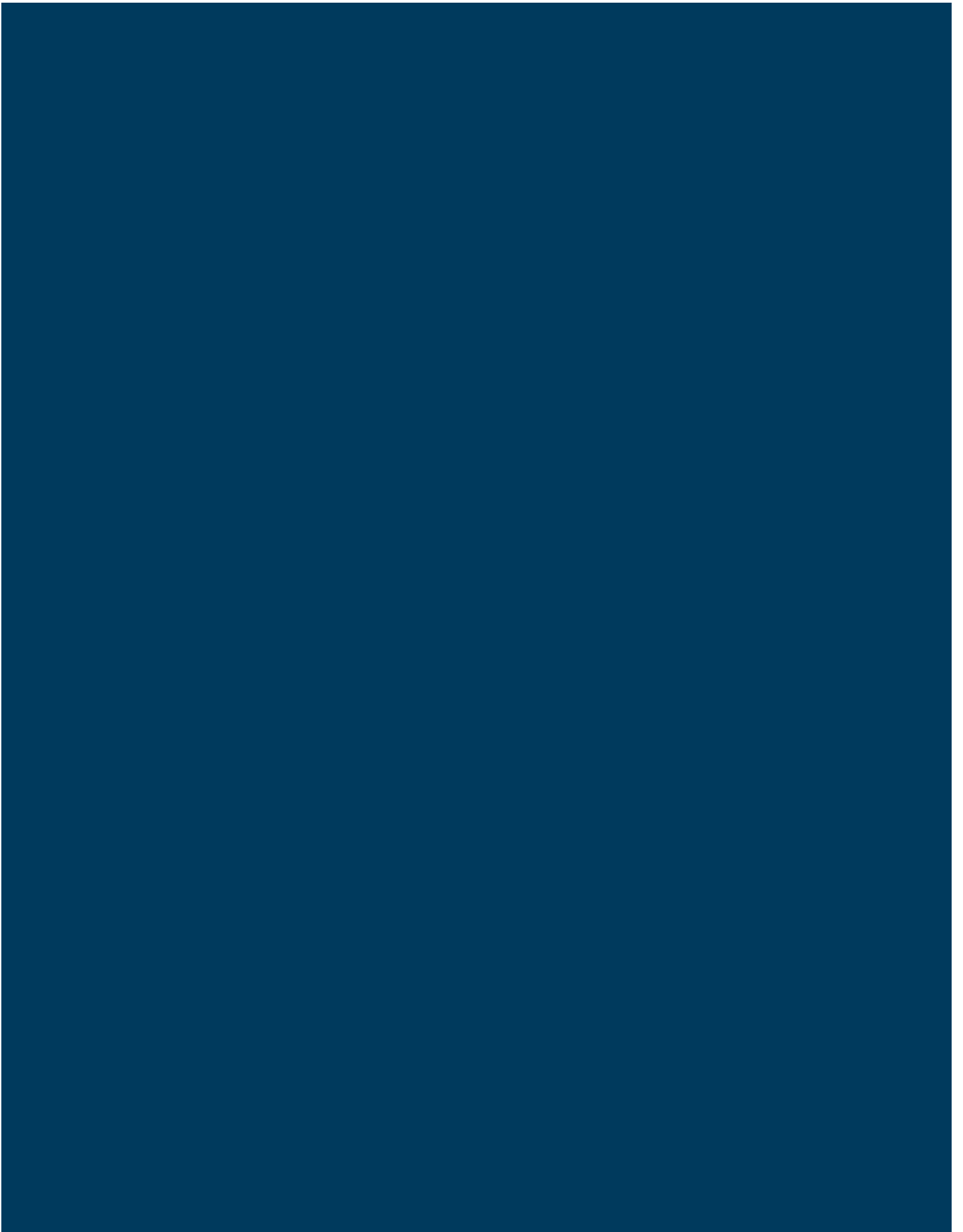
F.3.j   Policy Updates Support
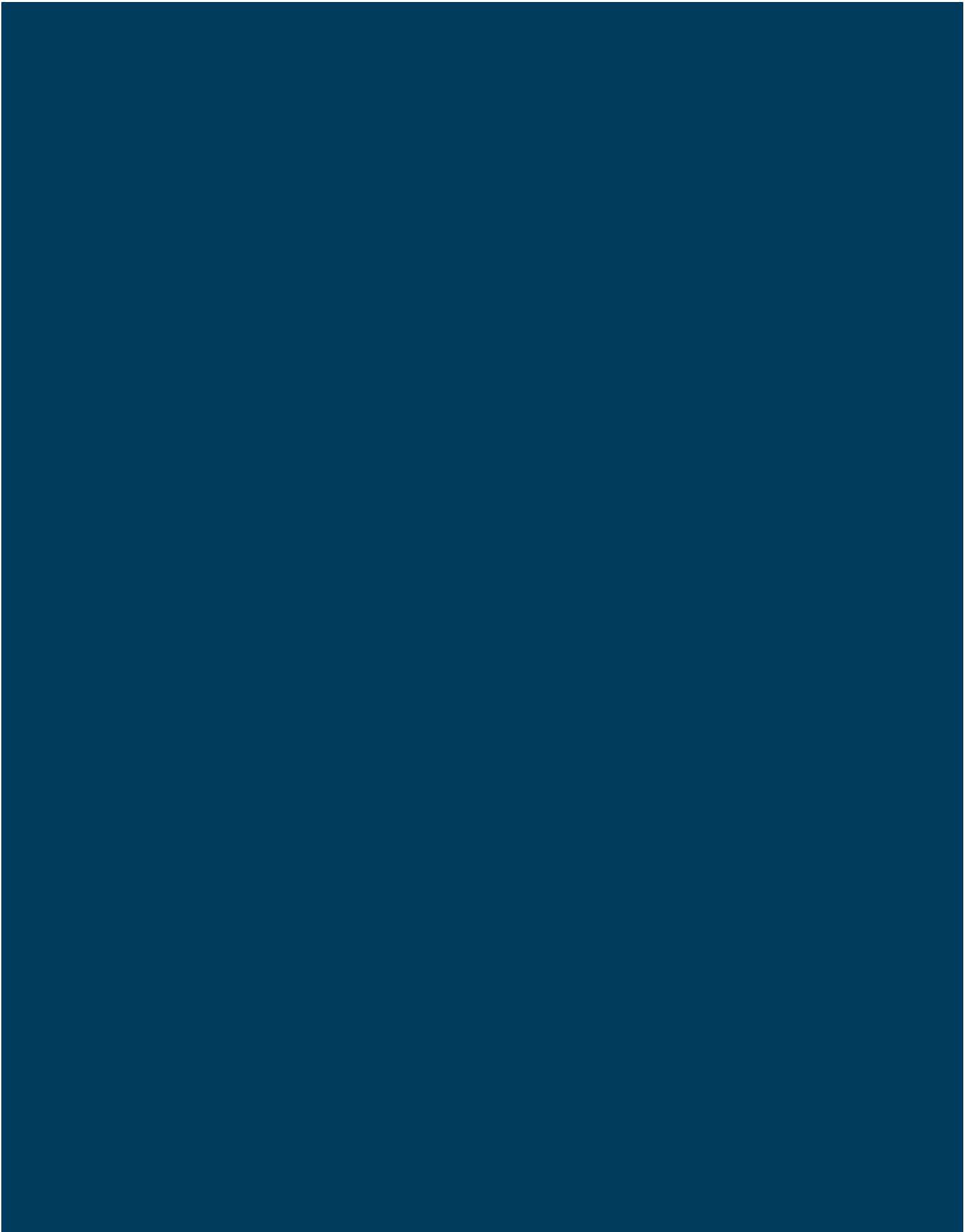
F.3.k   Other EOMC Support

k.   Other EOMC Support
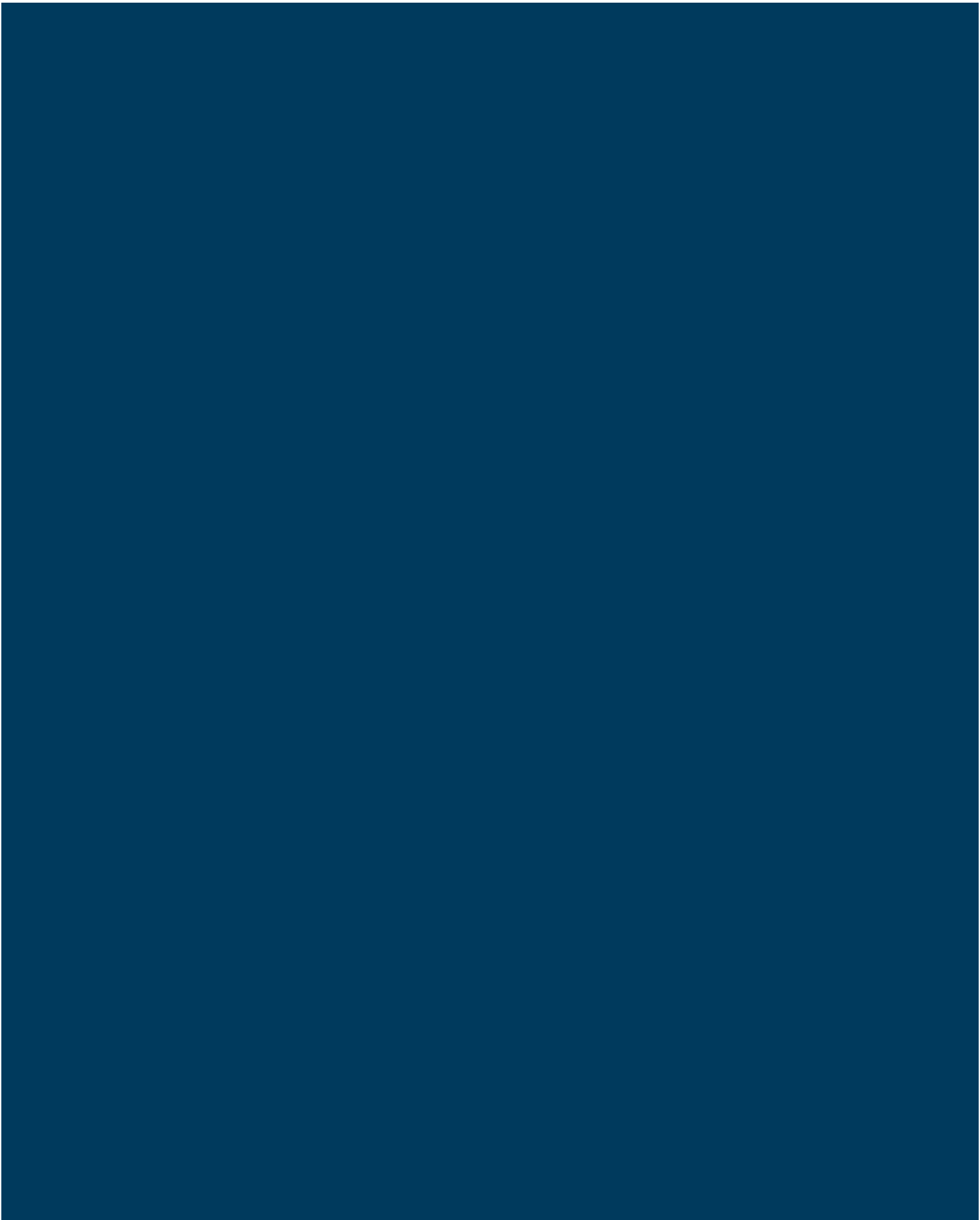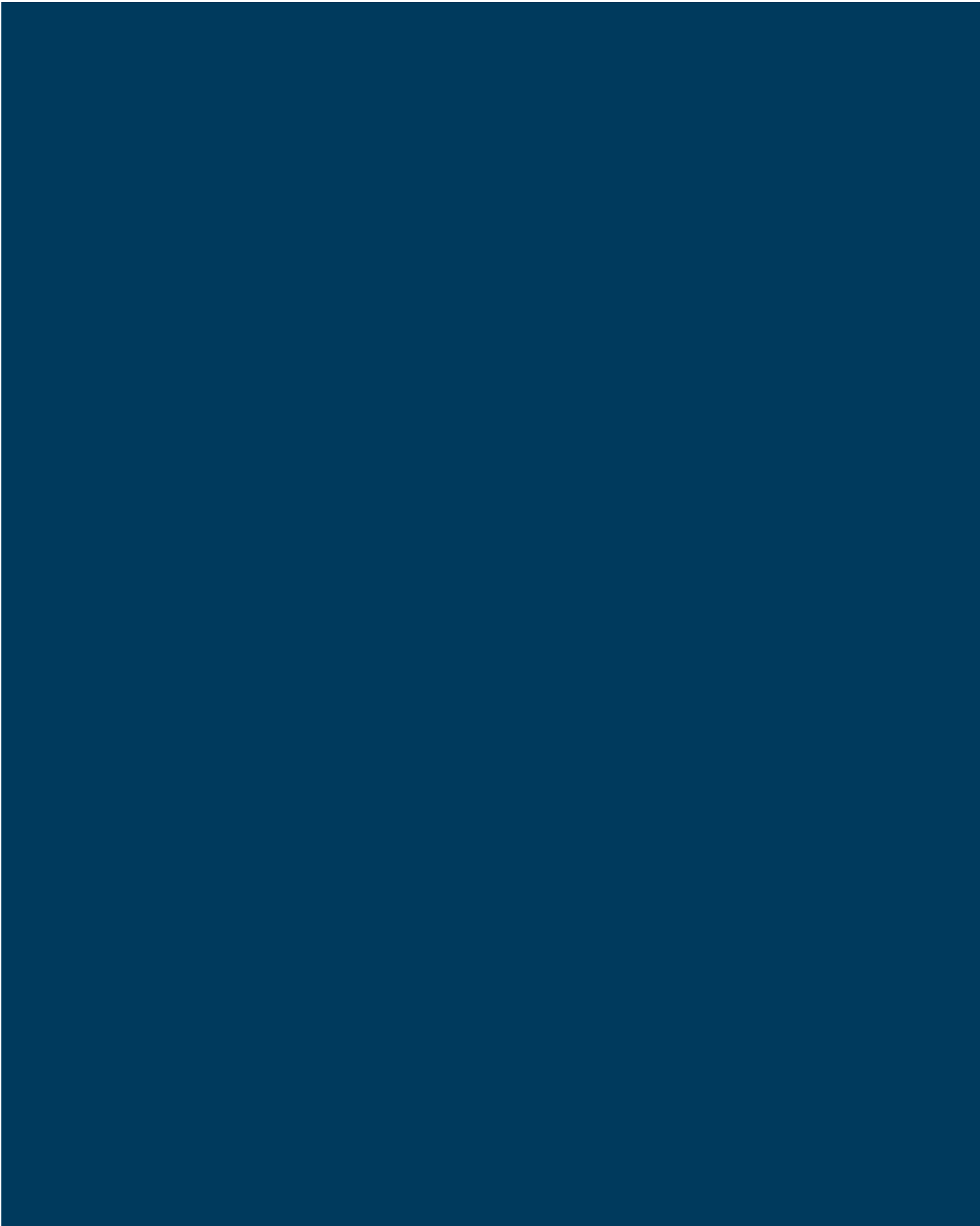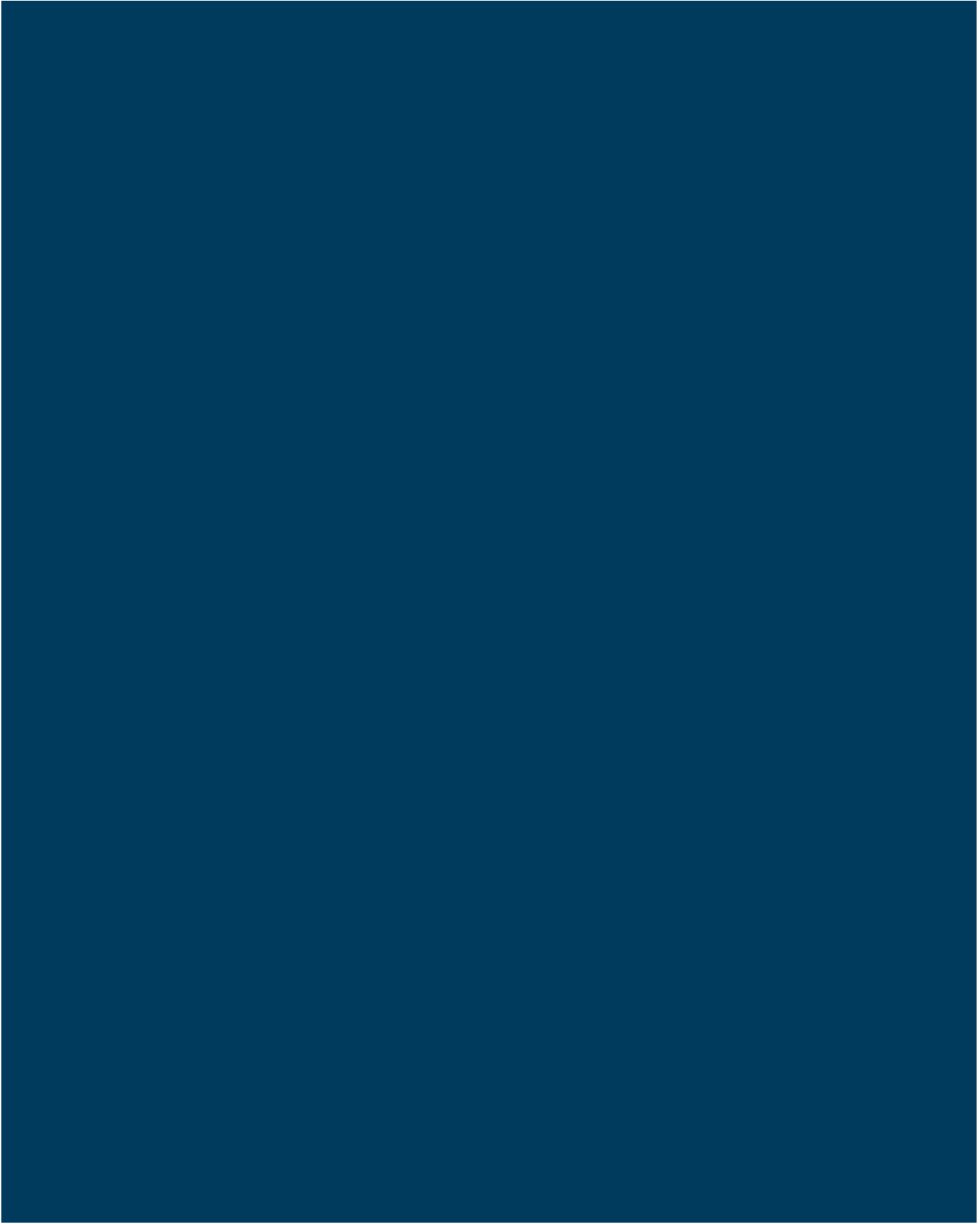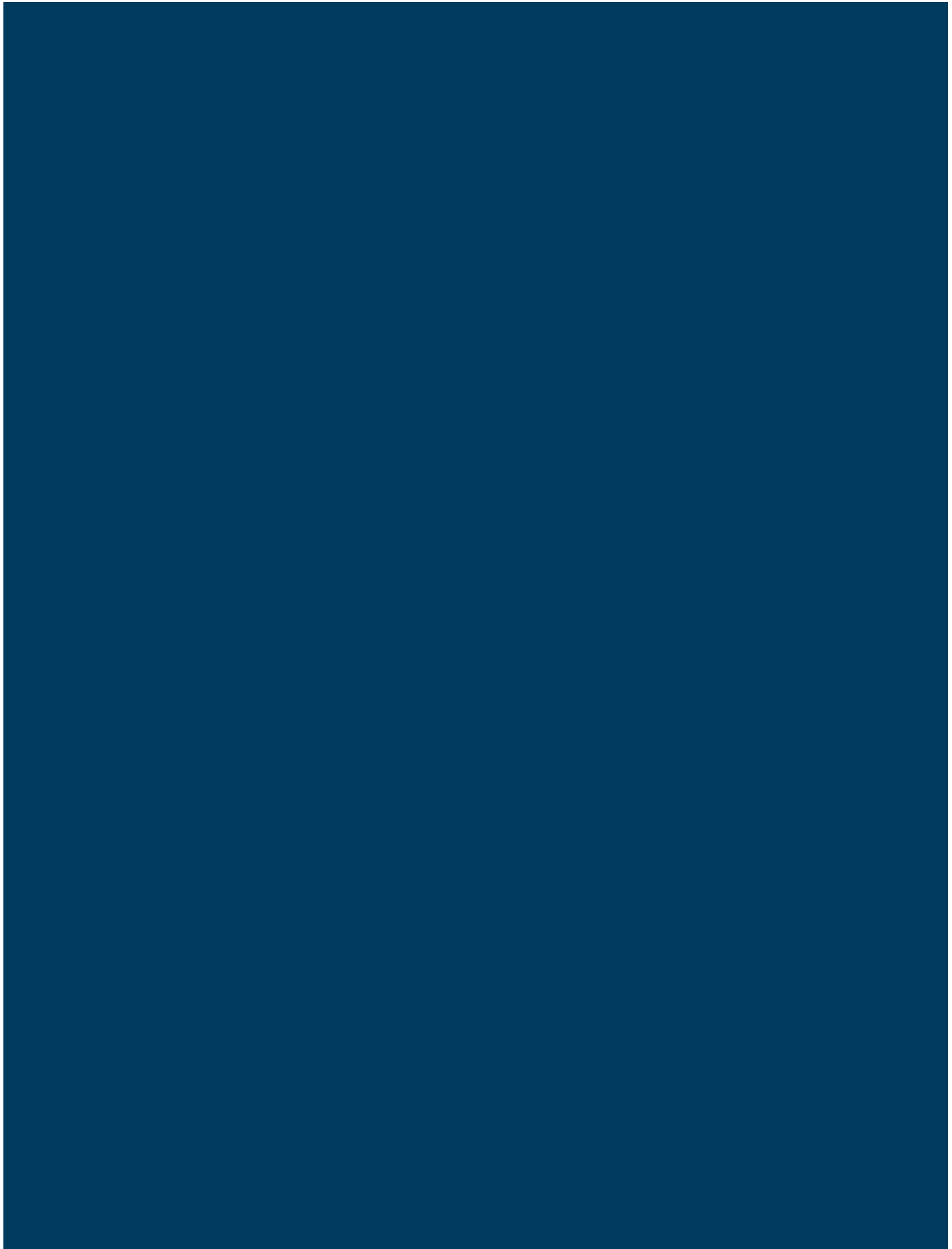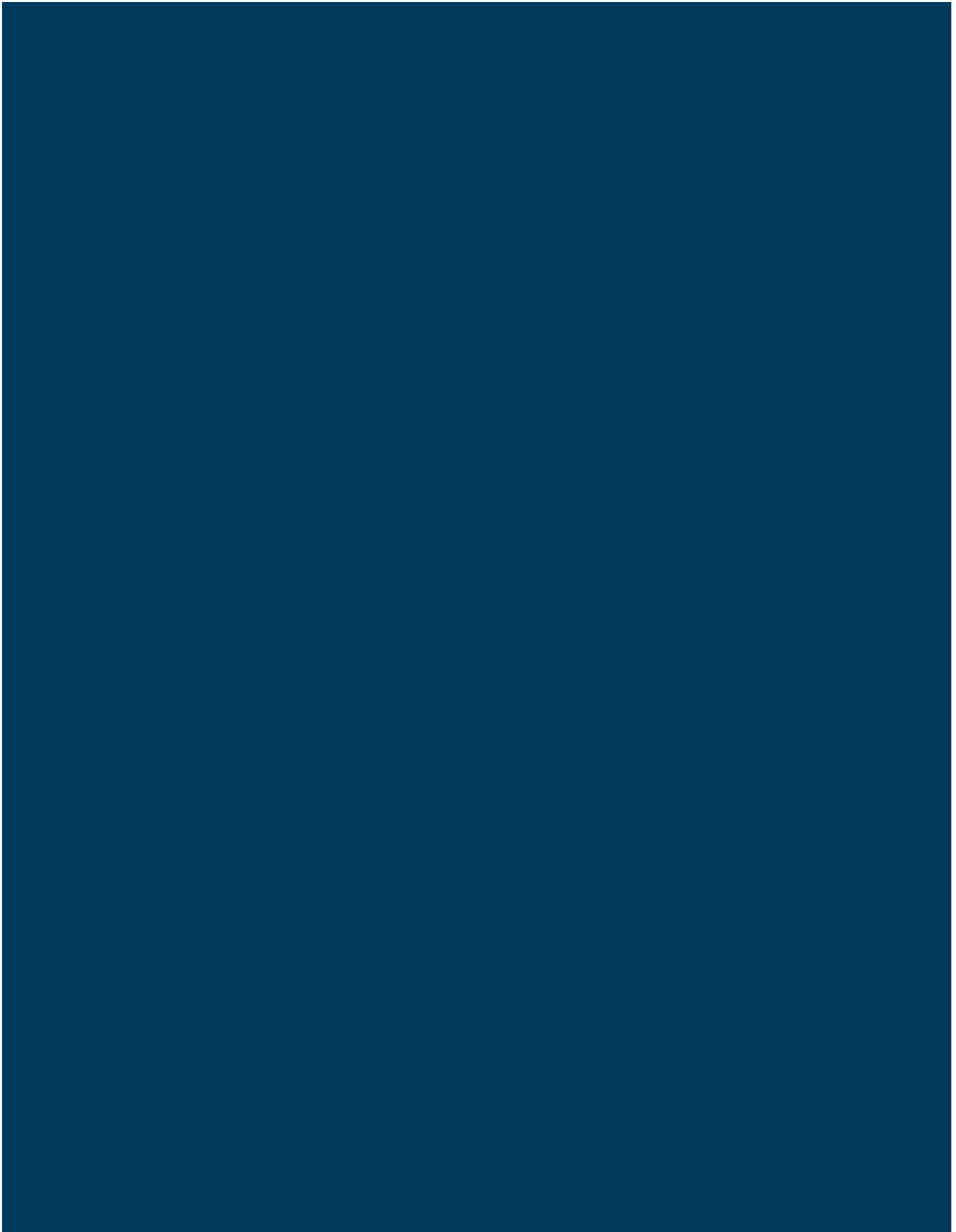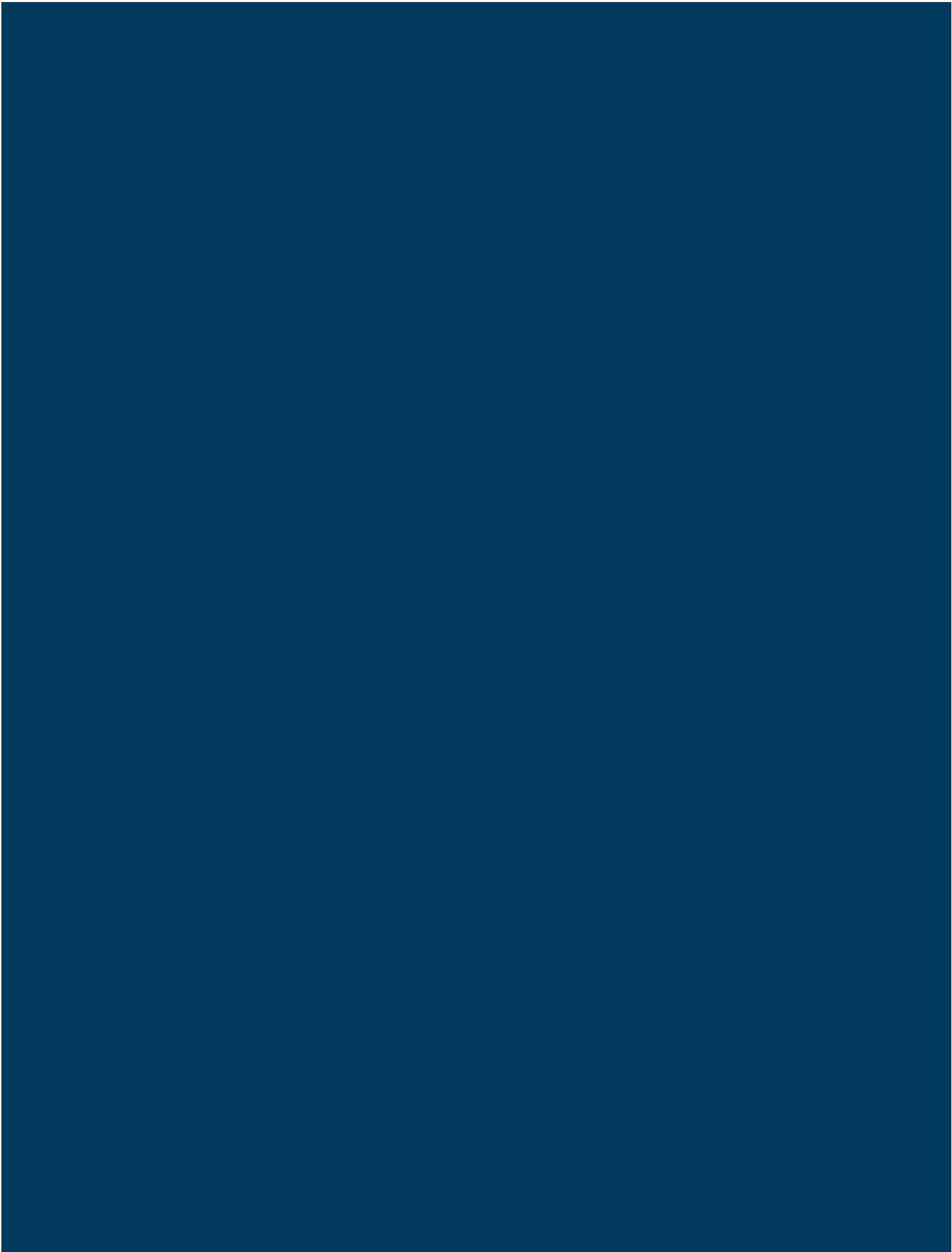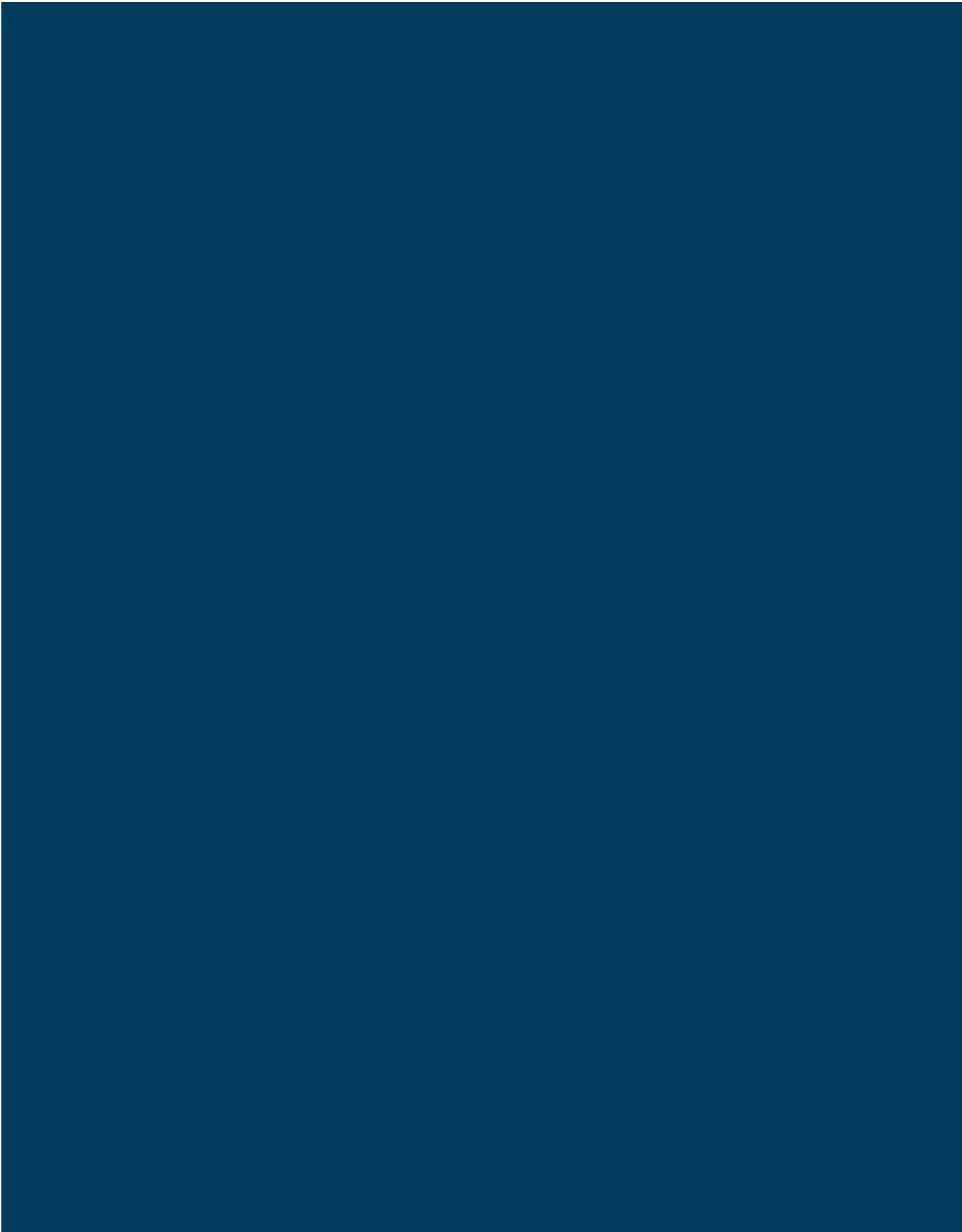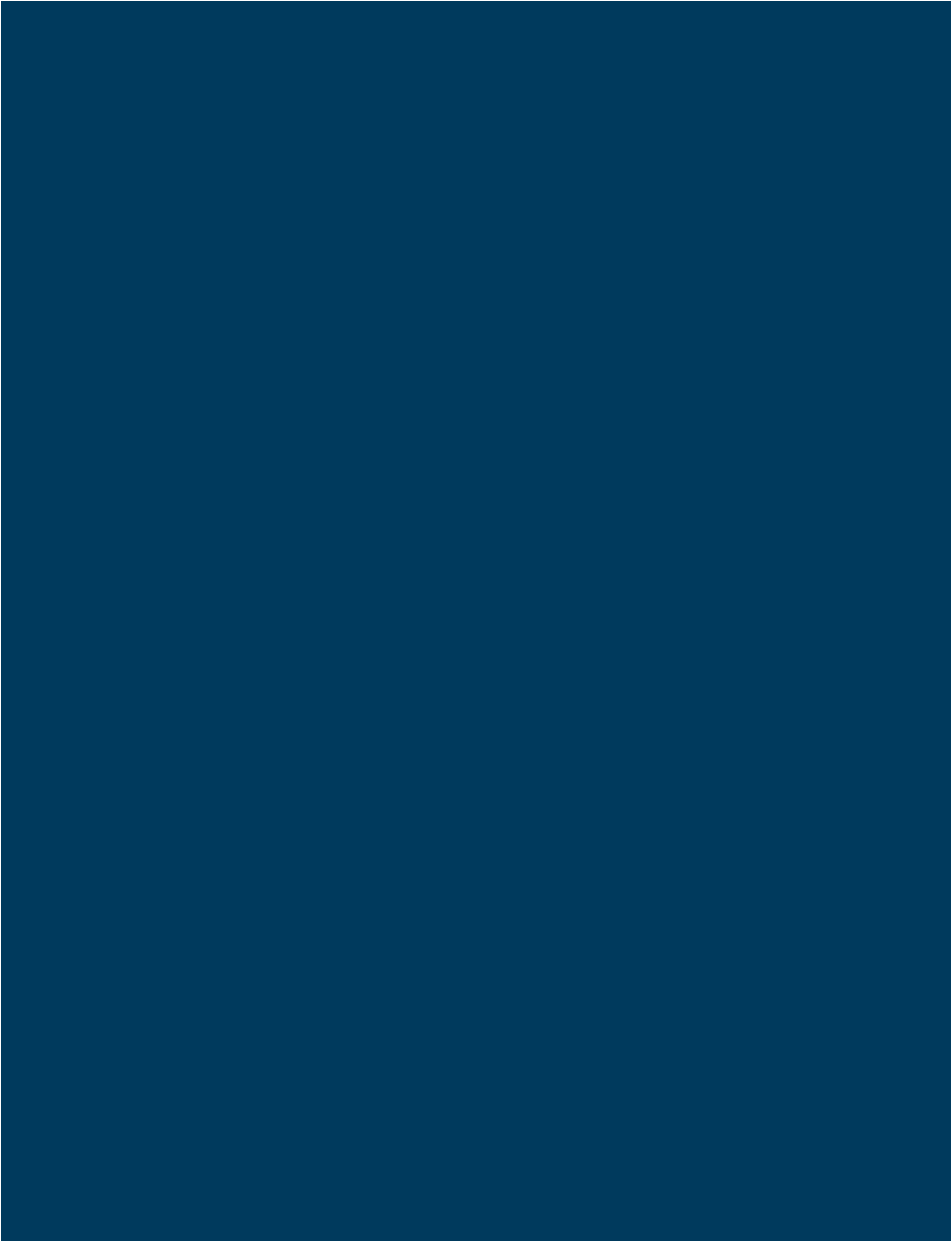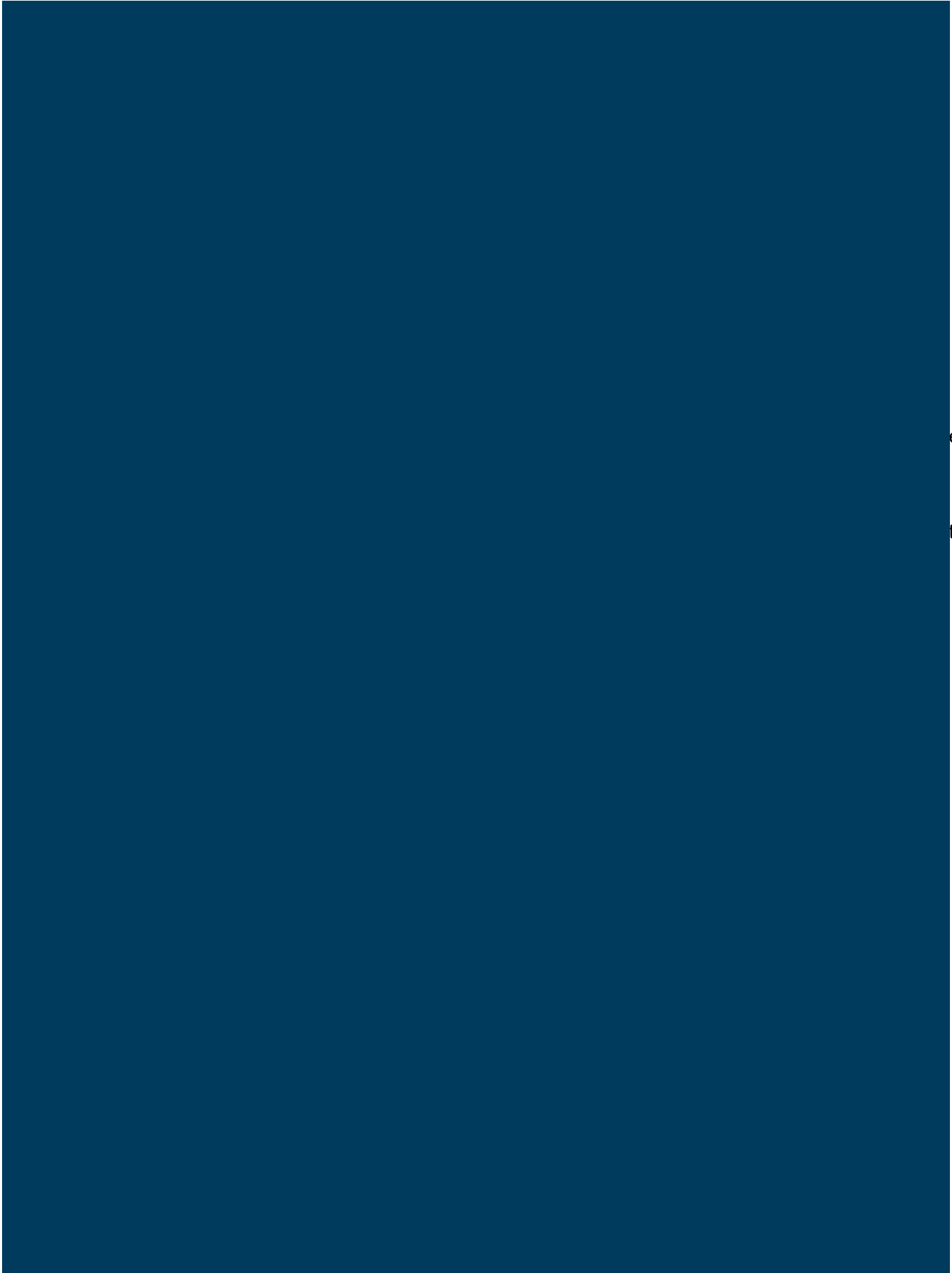
F.3.1 Organizational Change Management (OCM) Support

I. Organizational Change Management (OCM)
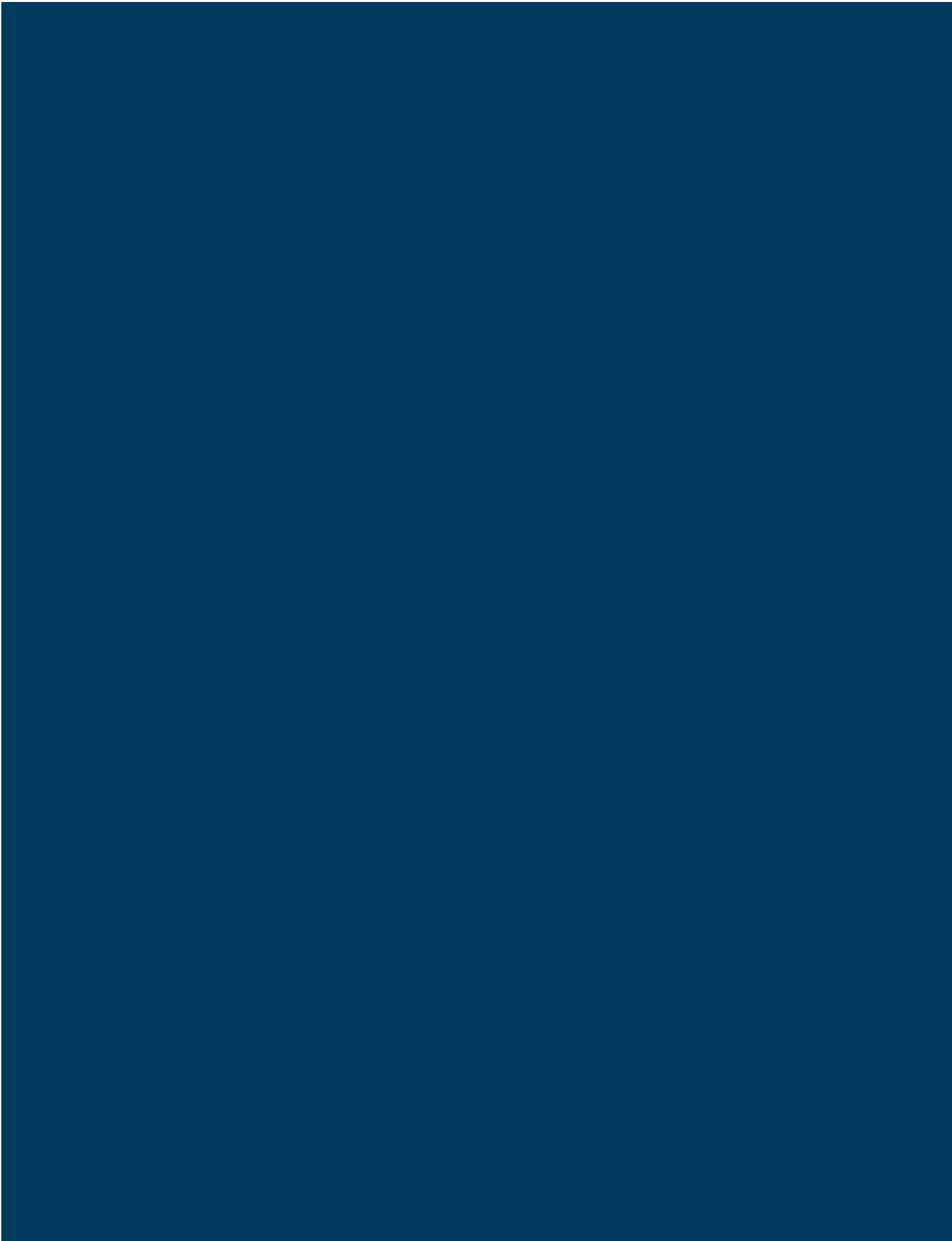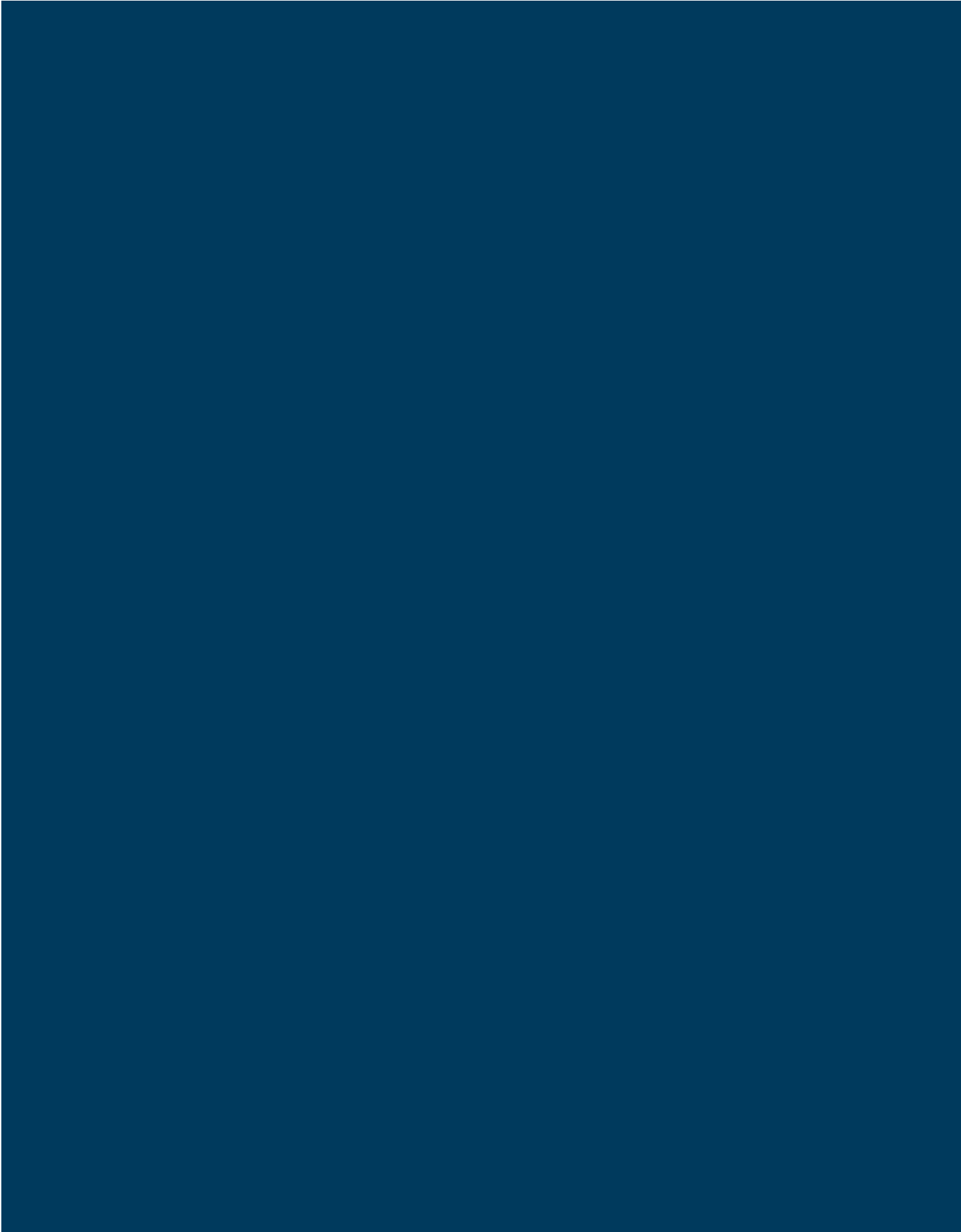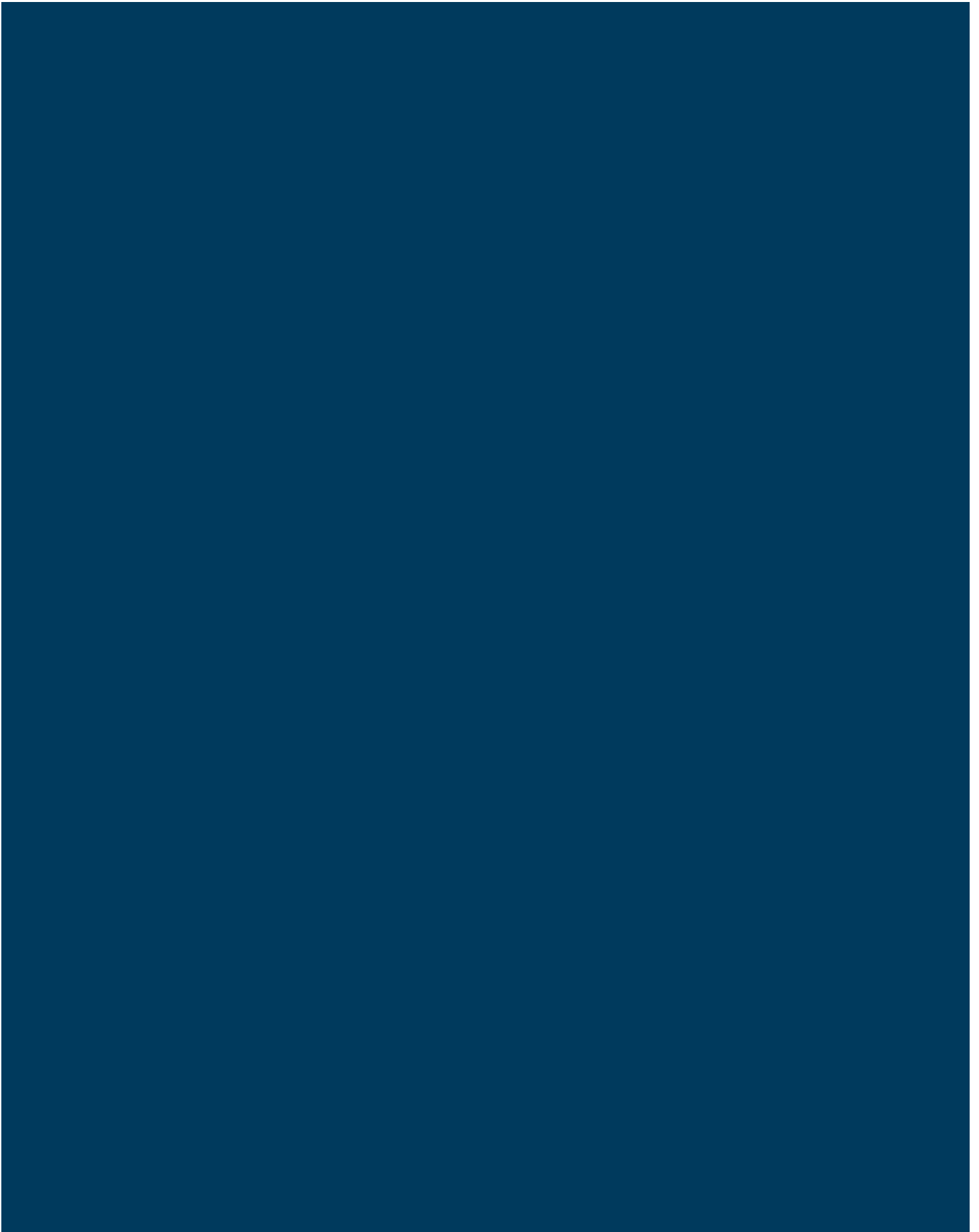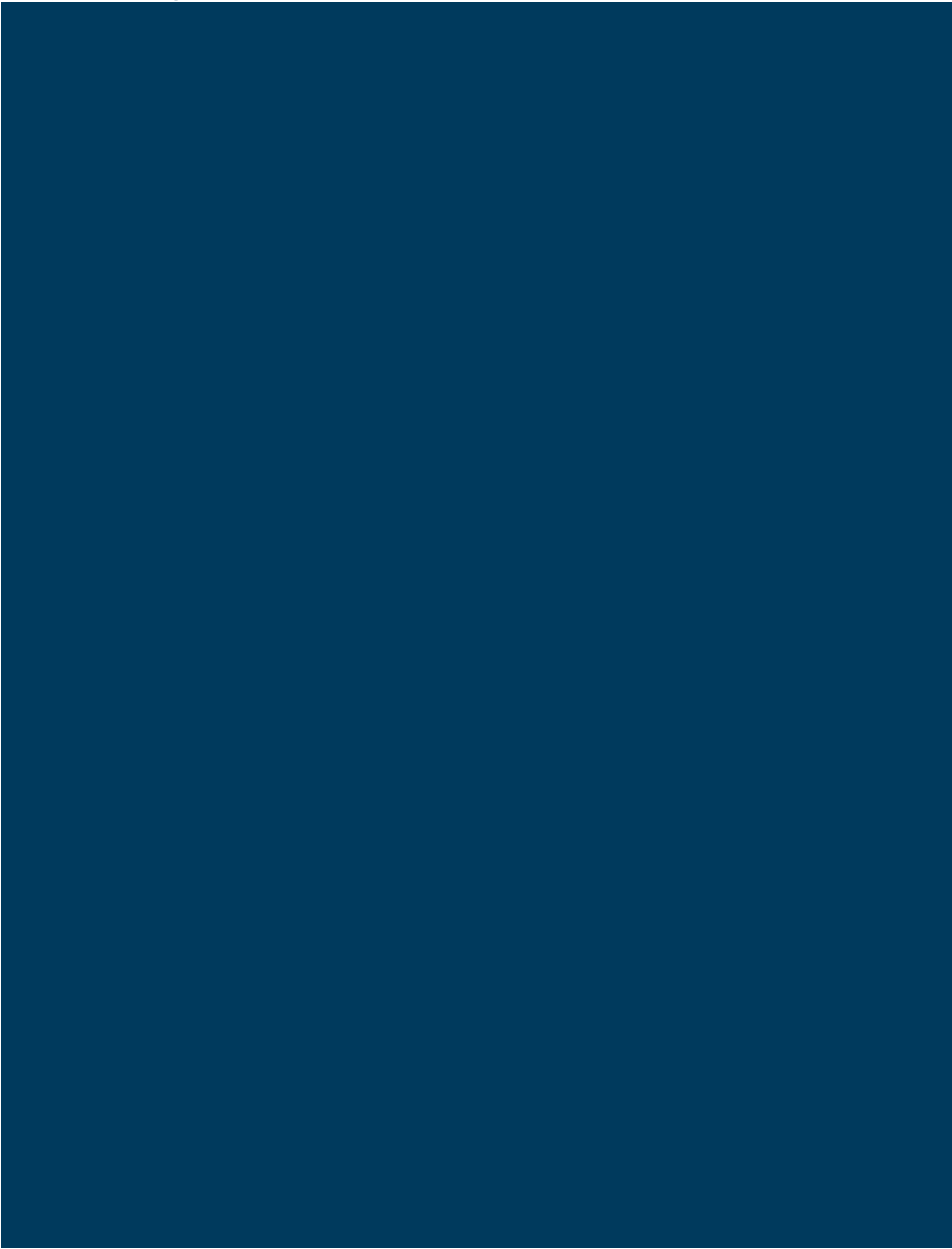
F.3.m   Enterprise Data Warehouse (EDW) Support

m.   Enterprise Data Warehouse (EDW)
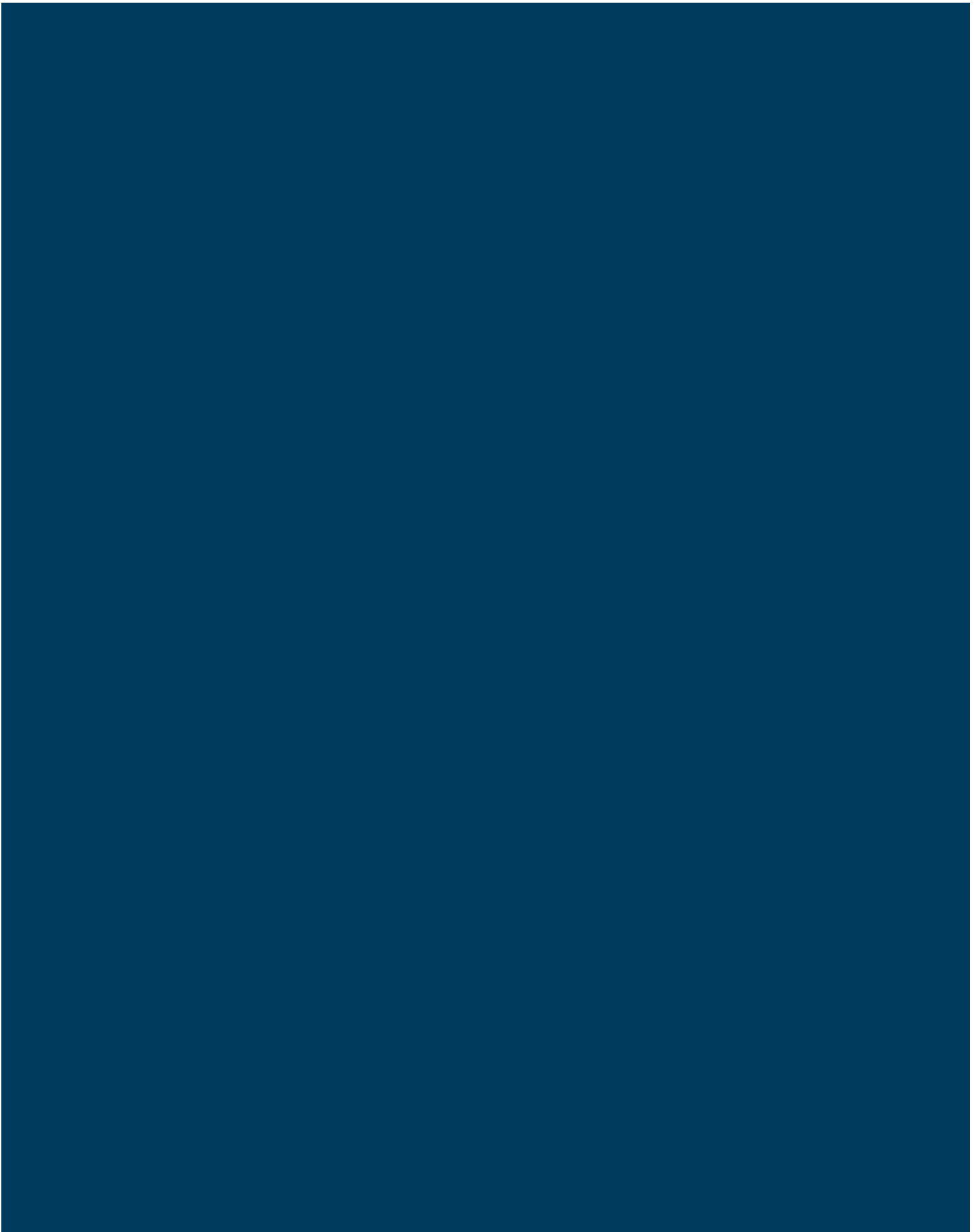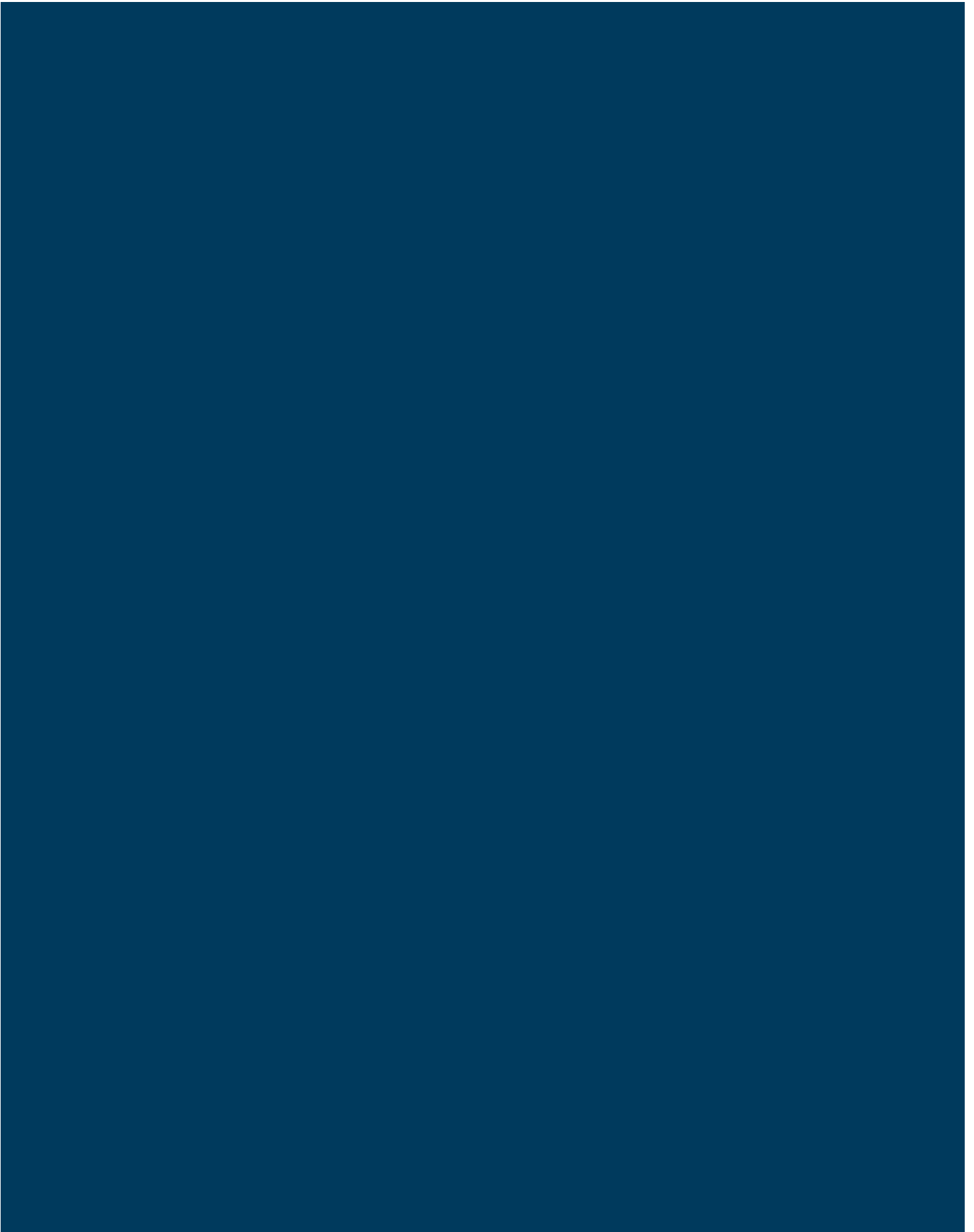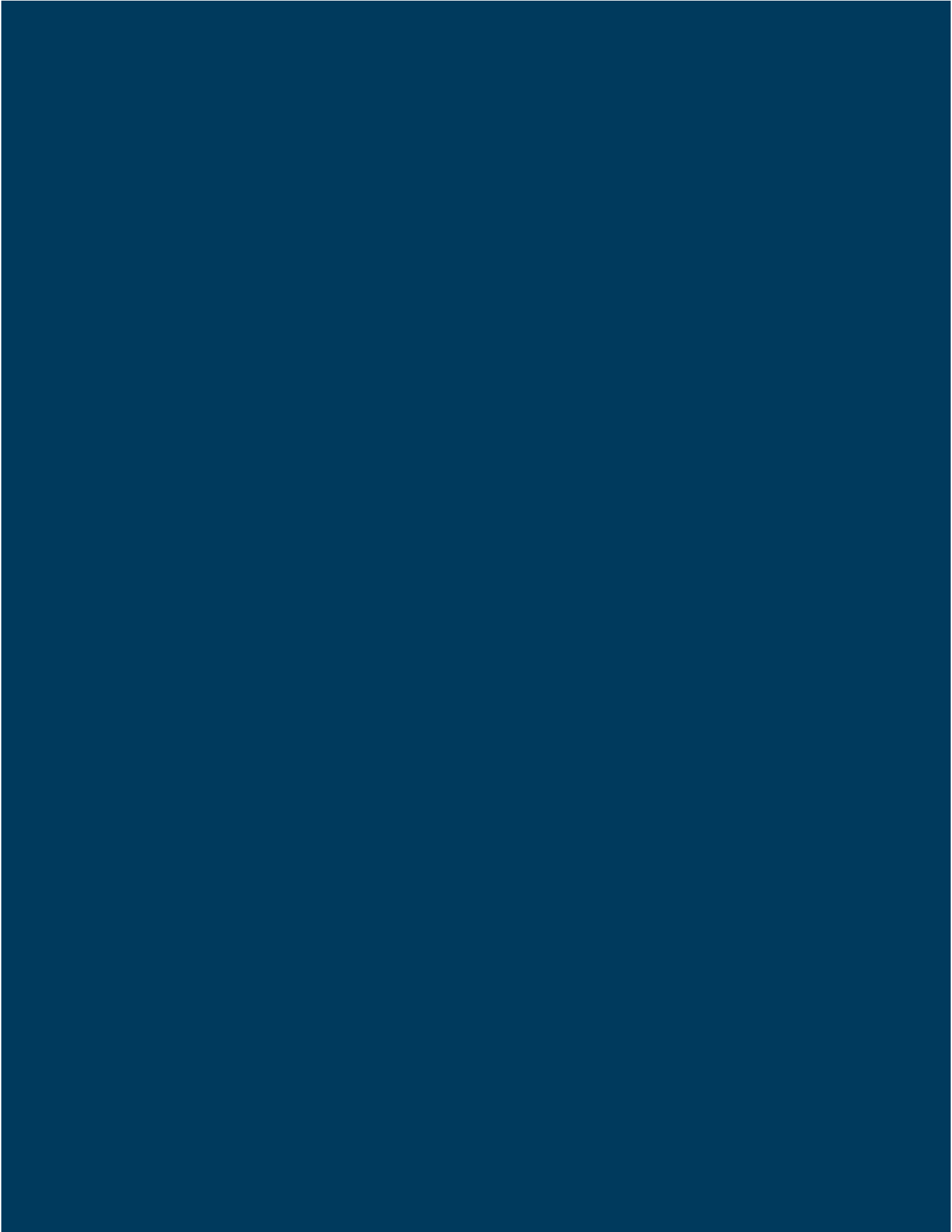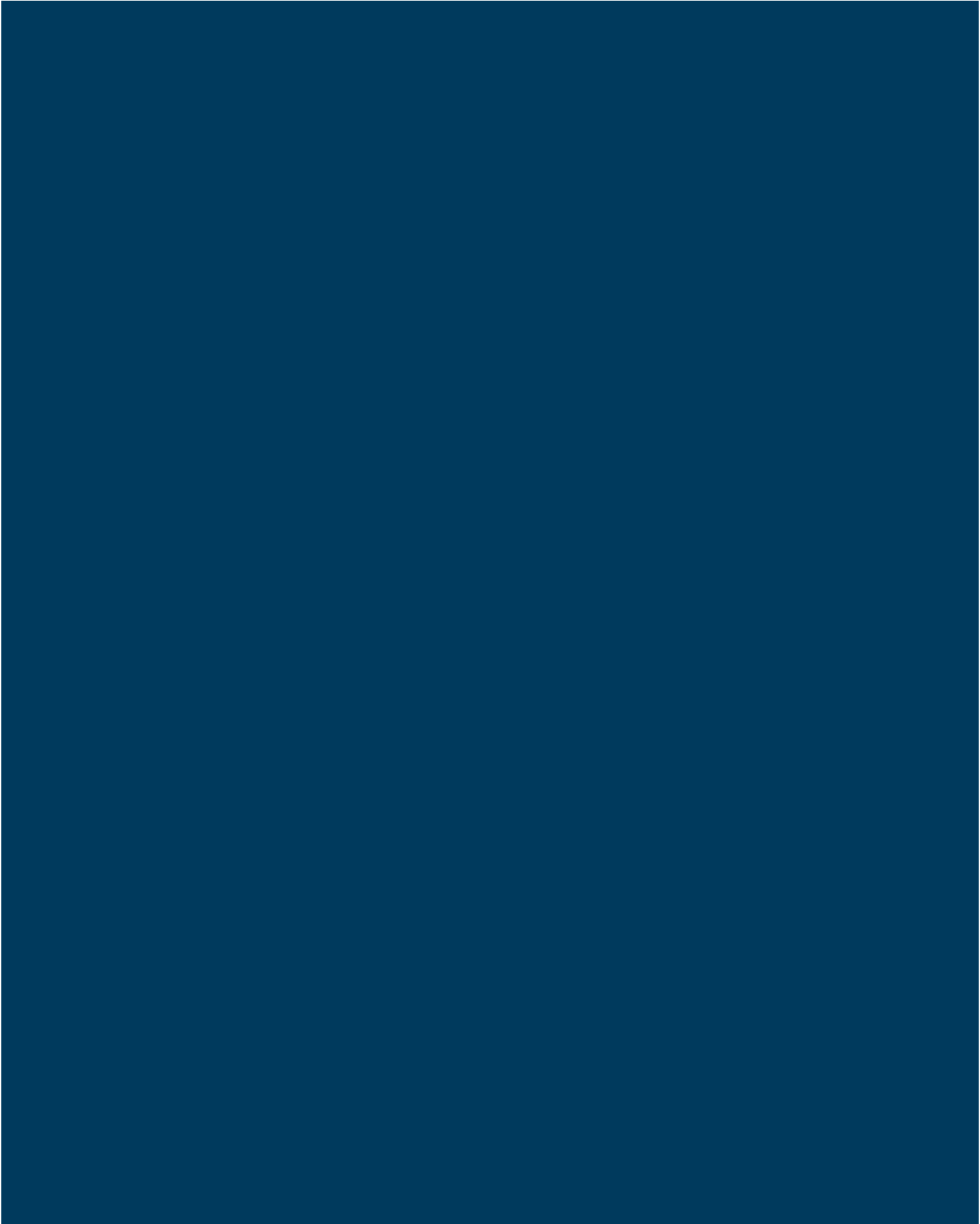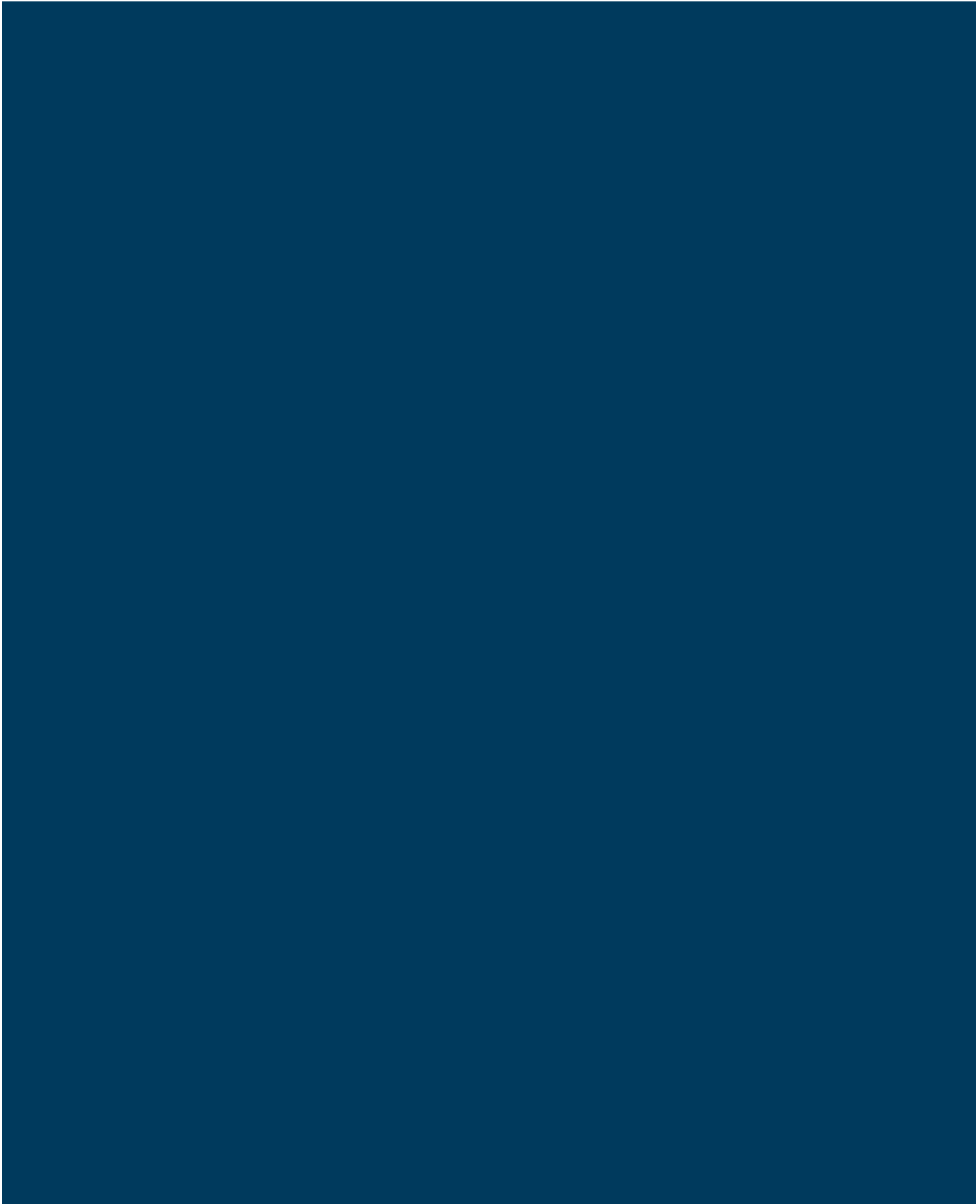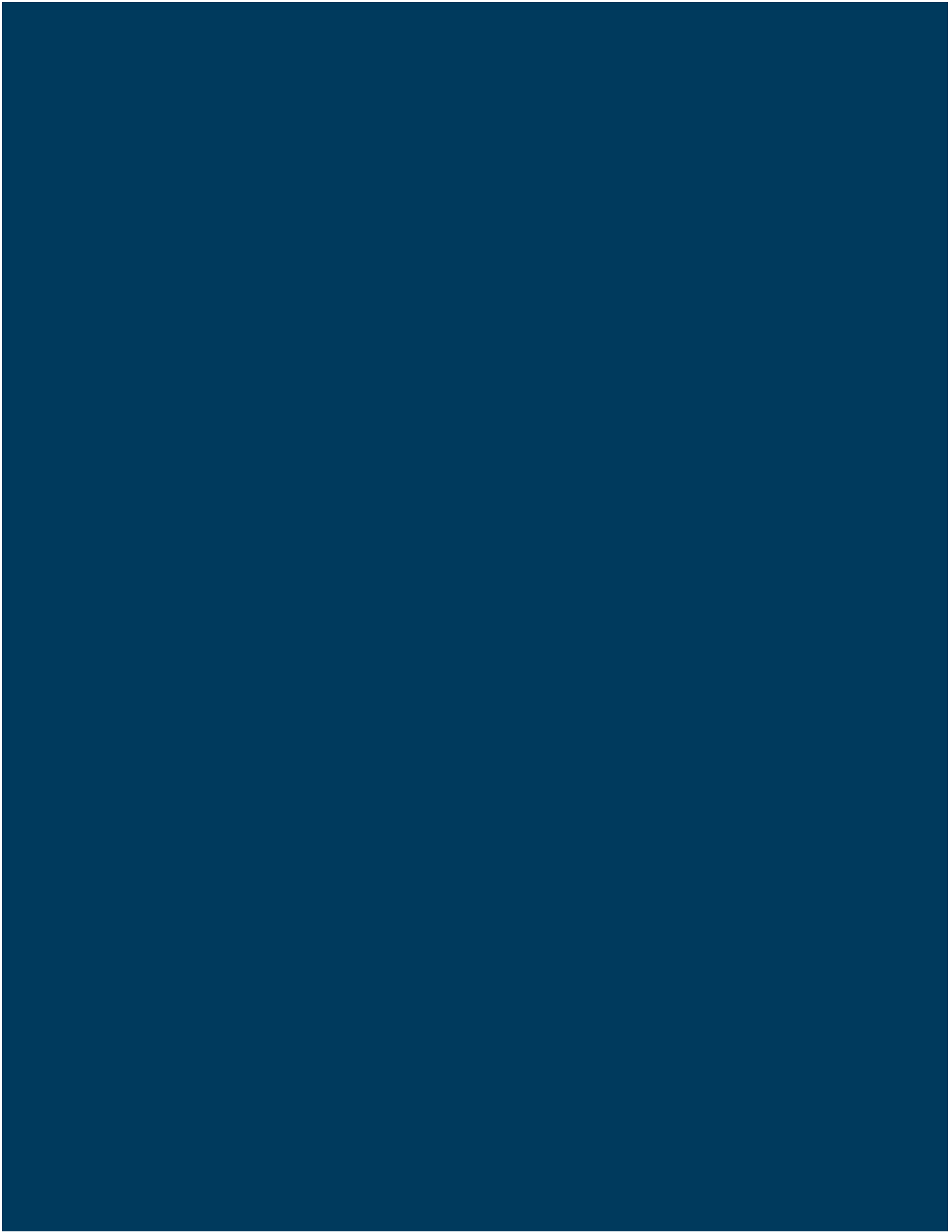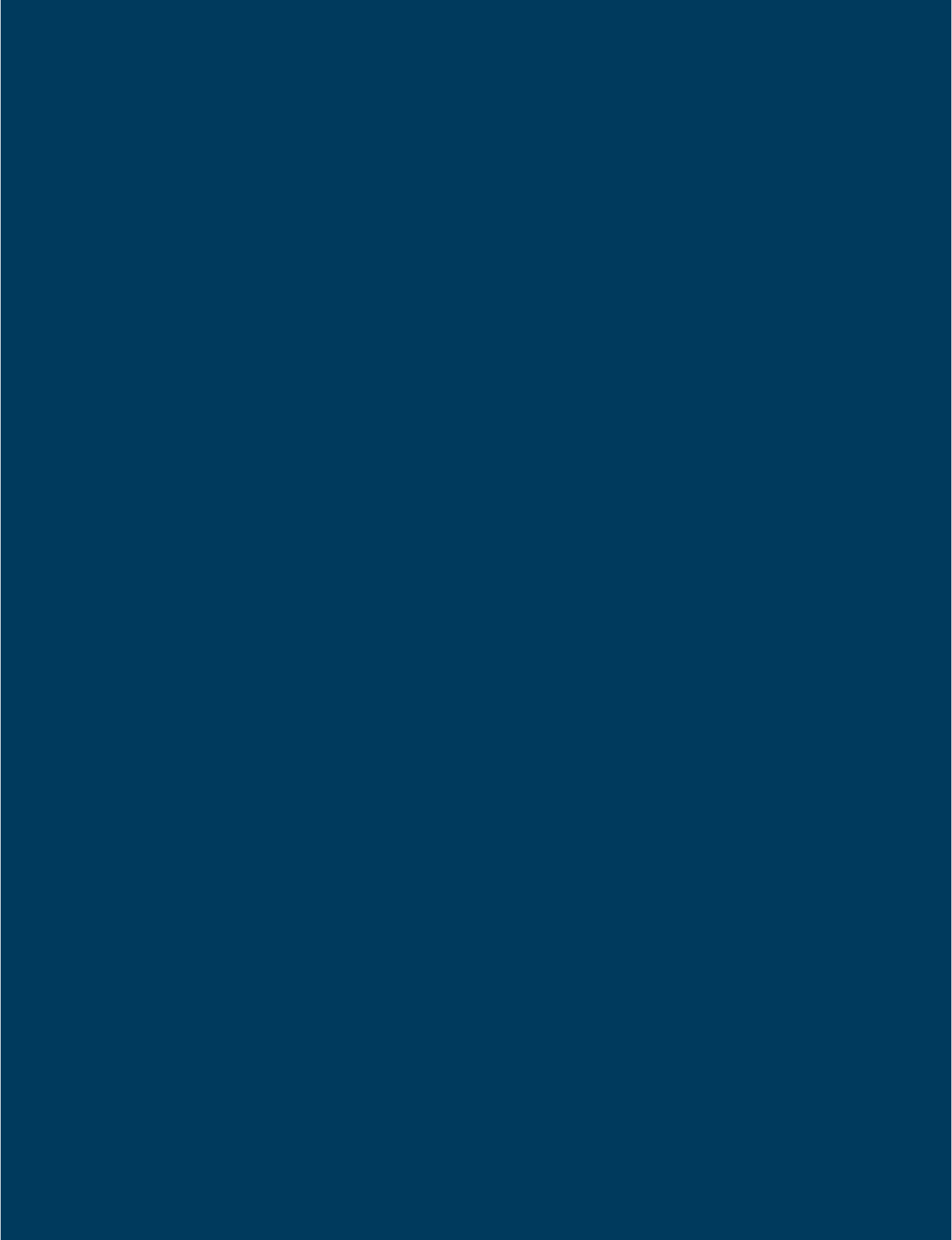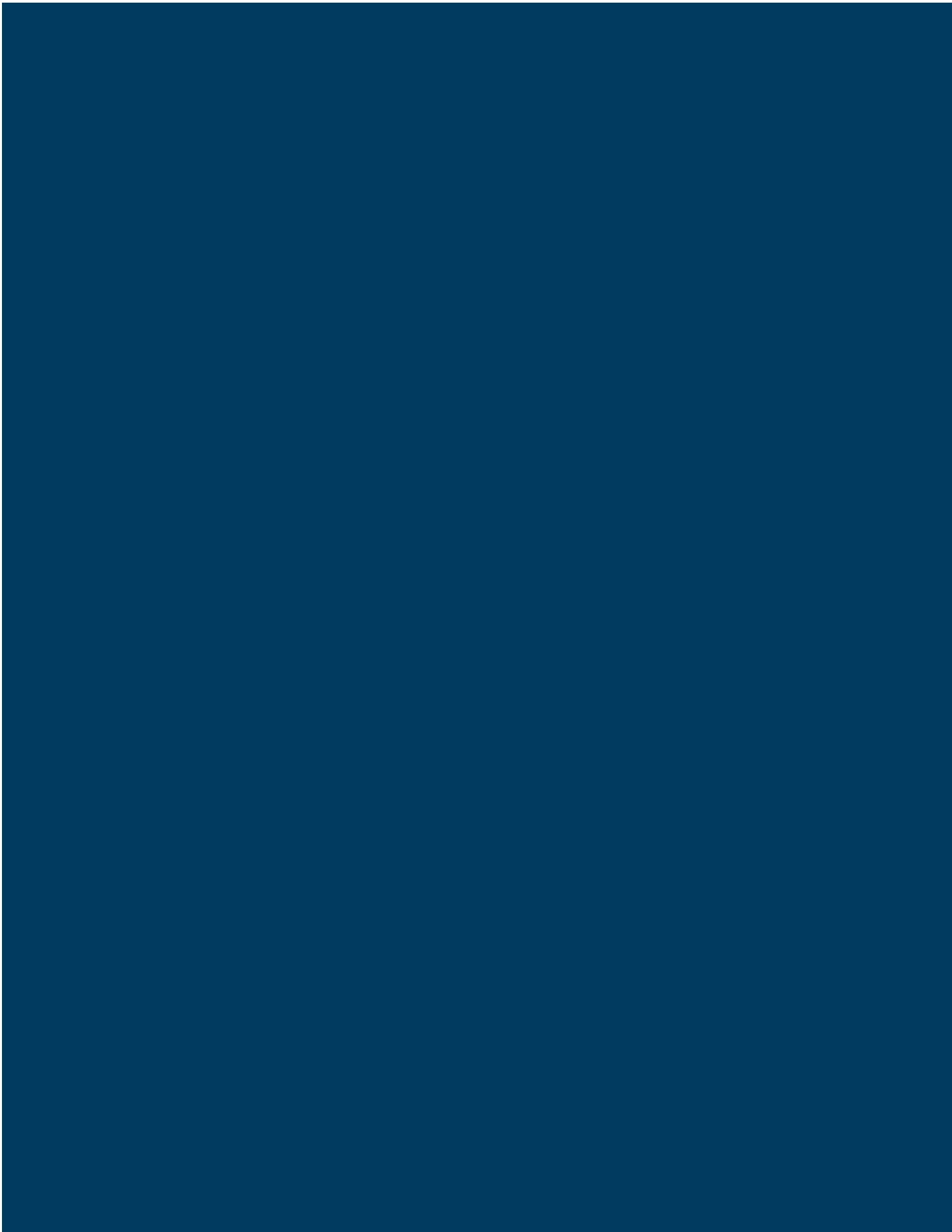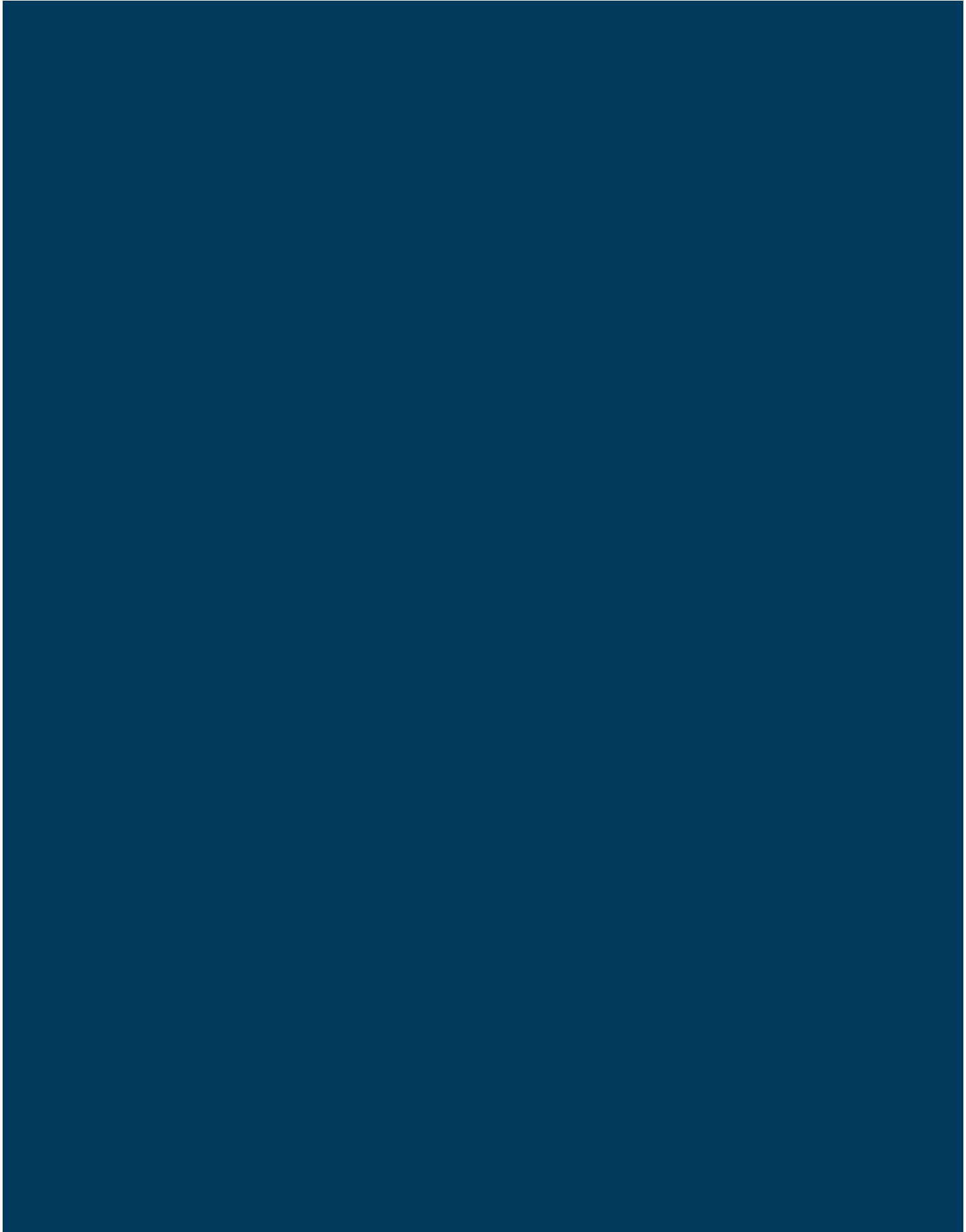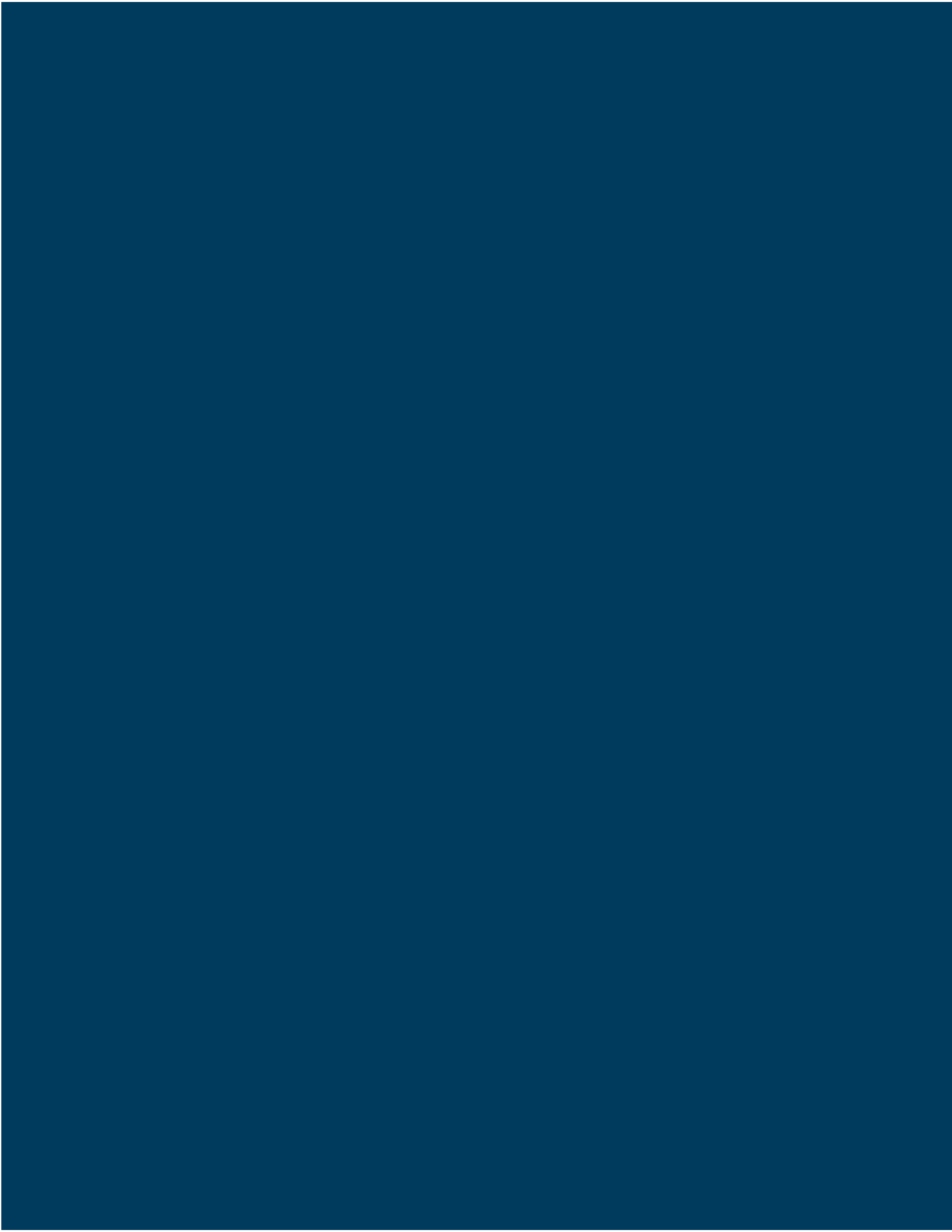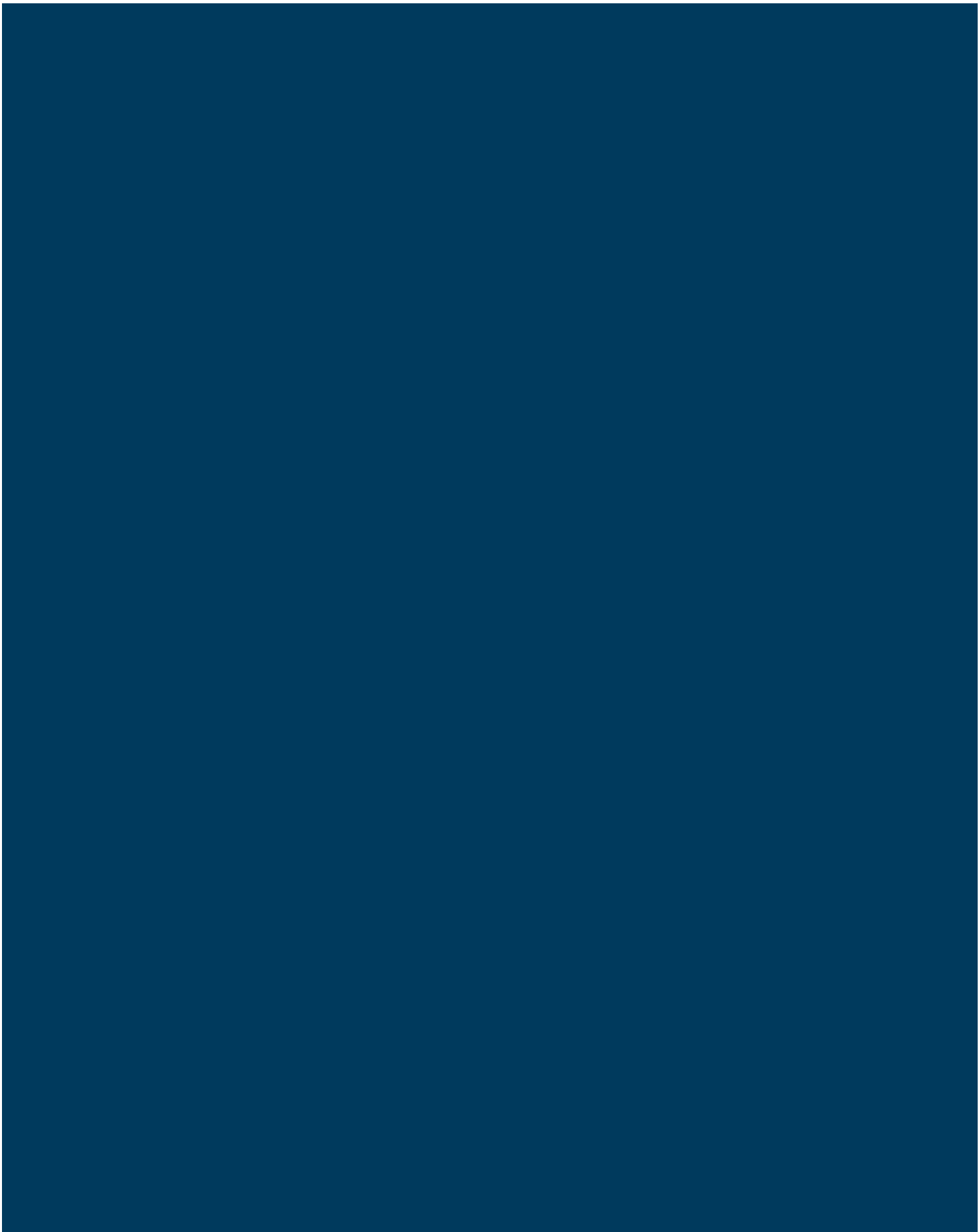
F.3.p   Add-On Services and Tools

F.3.p.1   Medicaid Learning Center (MLC)
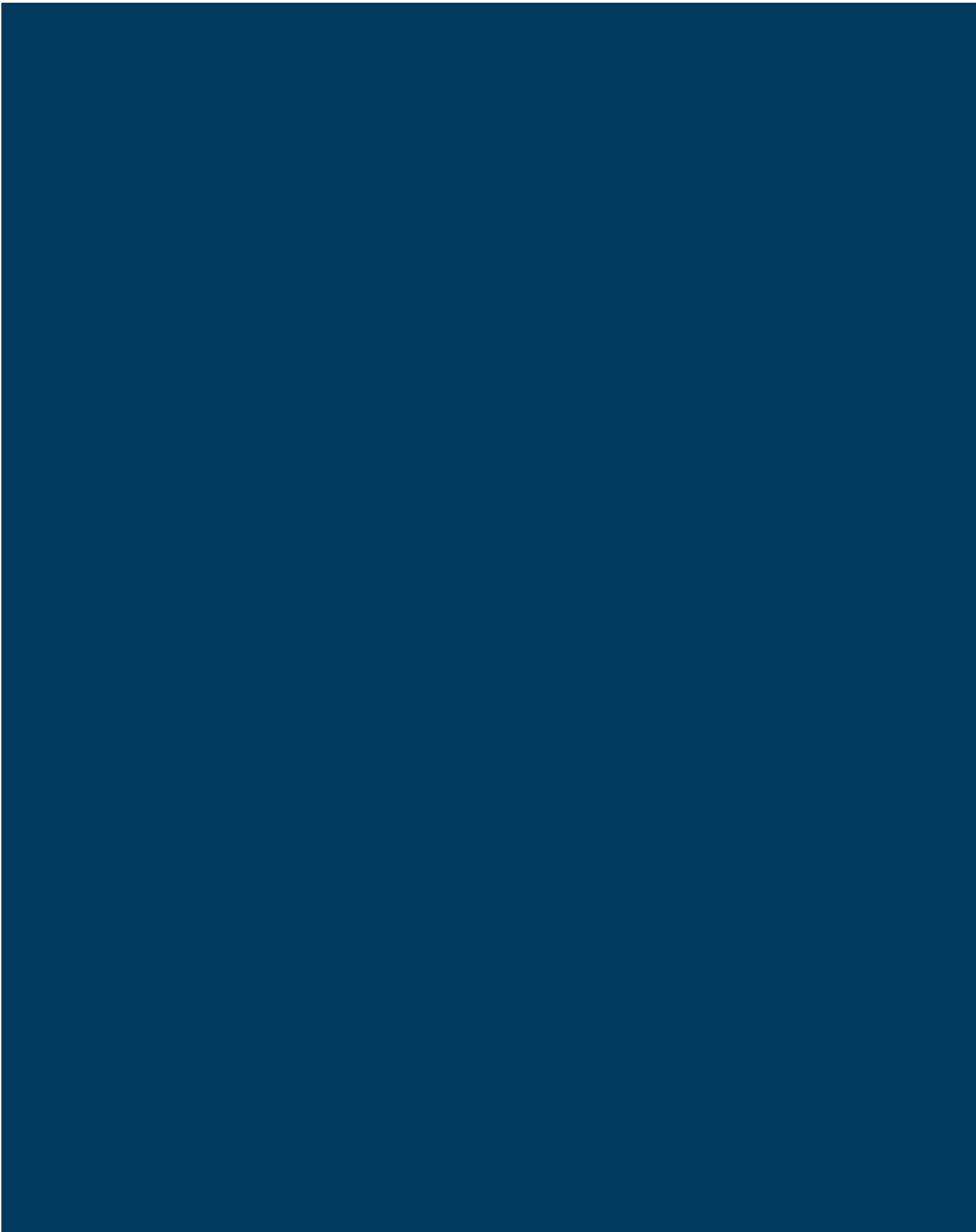
F.4　Approach to Staffing Requirements

Please describe in narrative form how your organization will meet the following Staffing requirements:

F.4.a　Proposed Staff

a.　*Provide the names of the proposed staff for each service area, include their qualifications and experience. Describe how the proposed staff are best suited to meet the requirements of this RFP.*
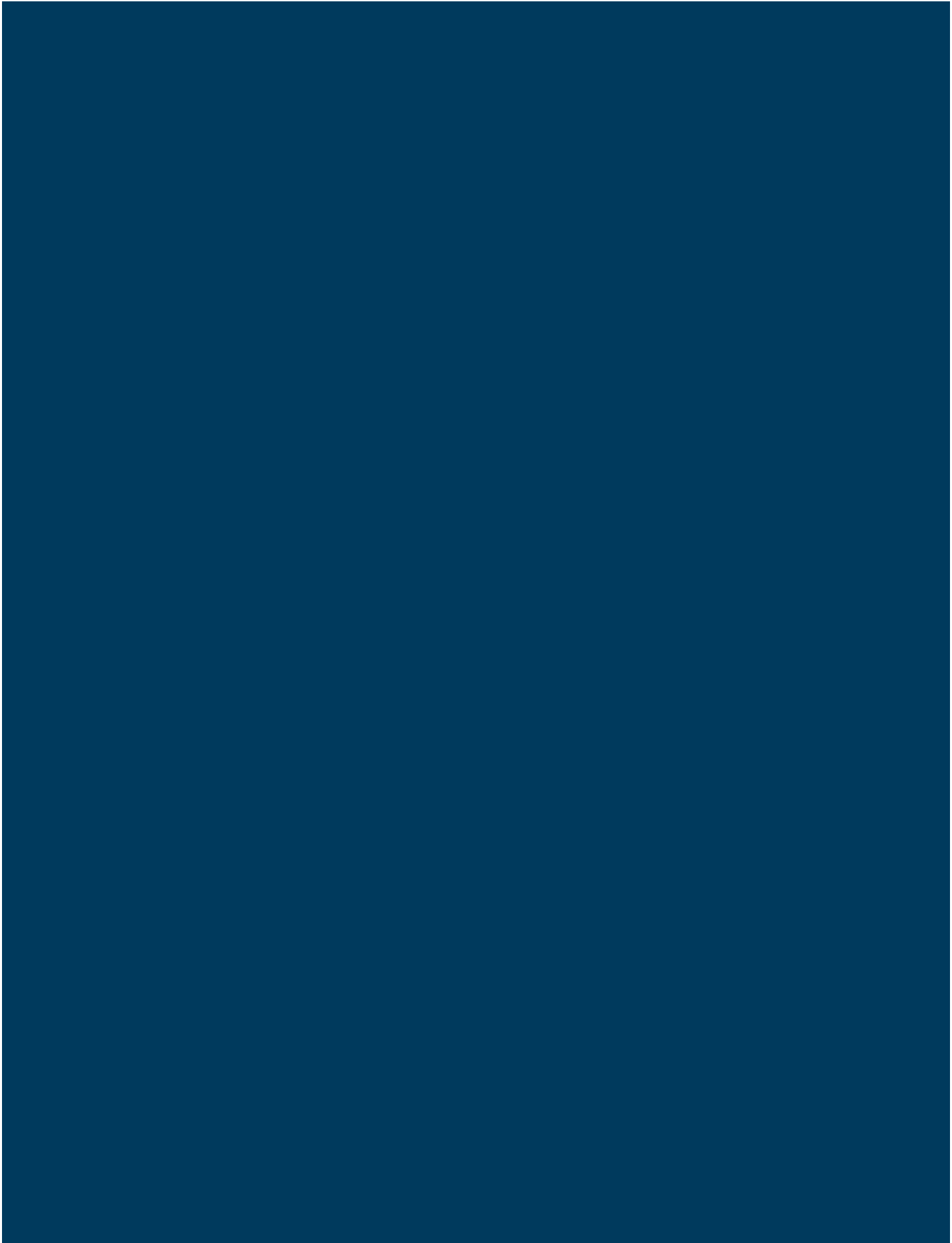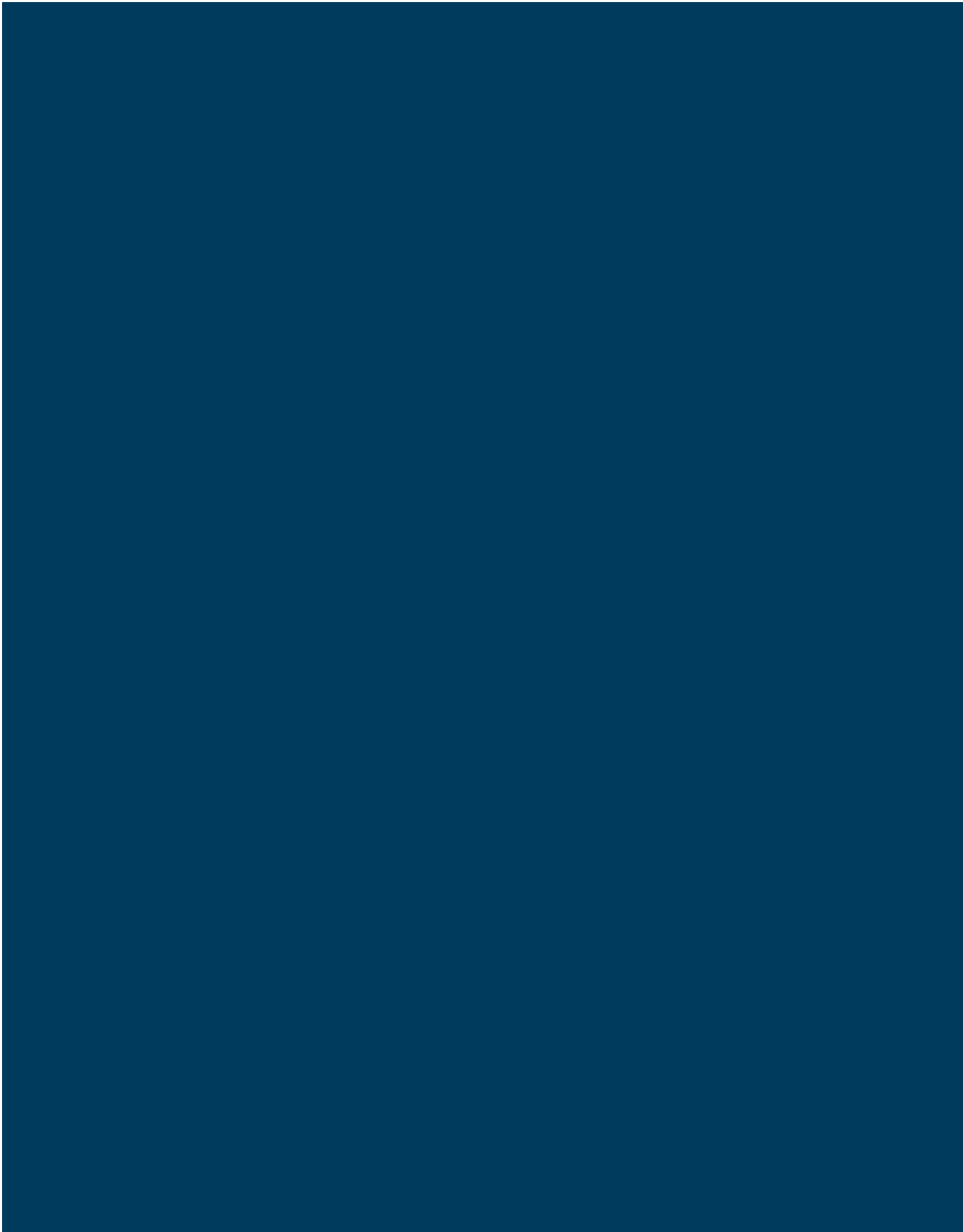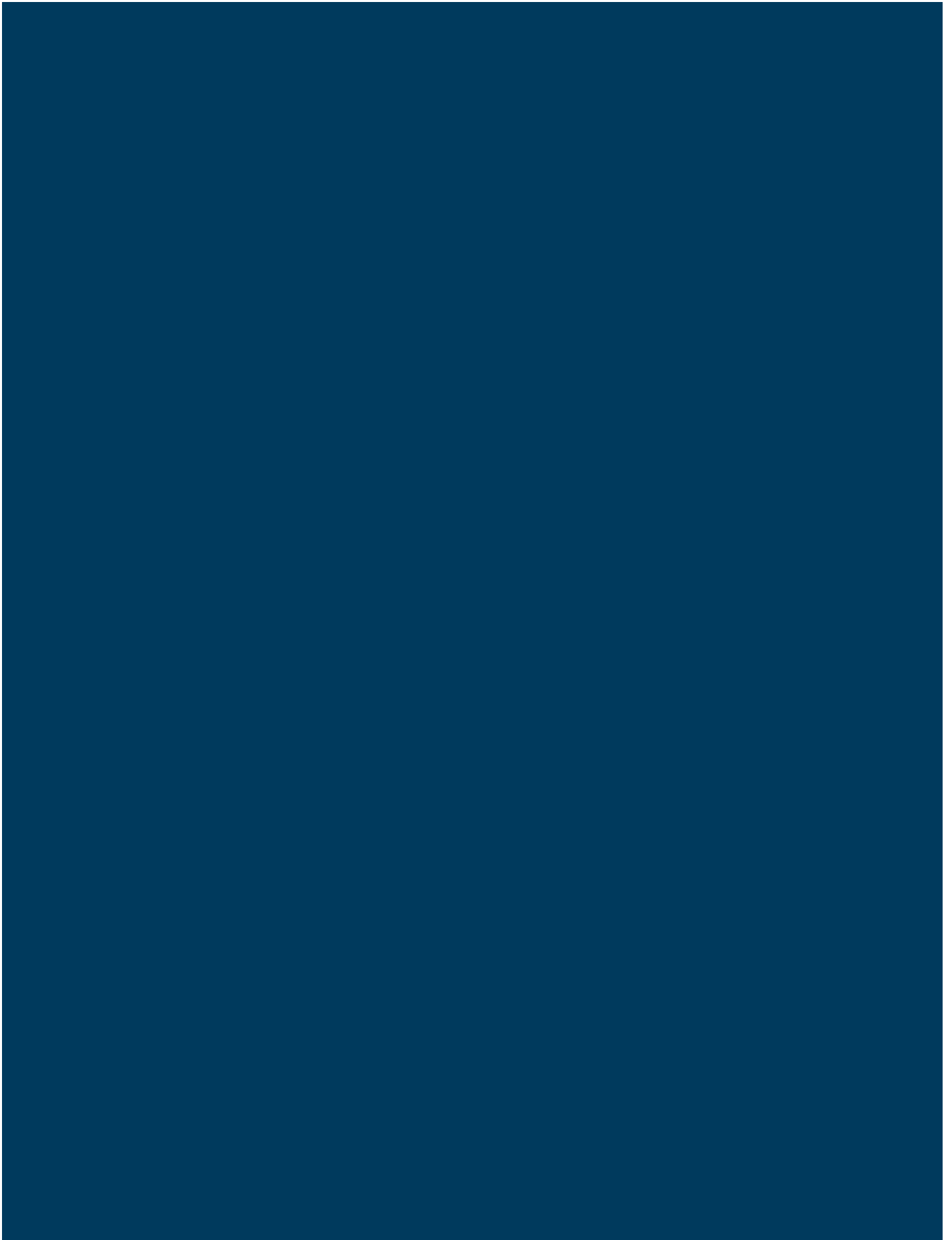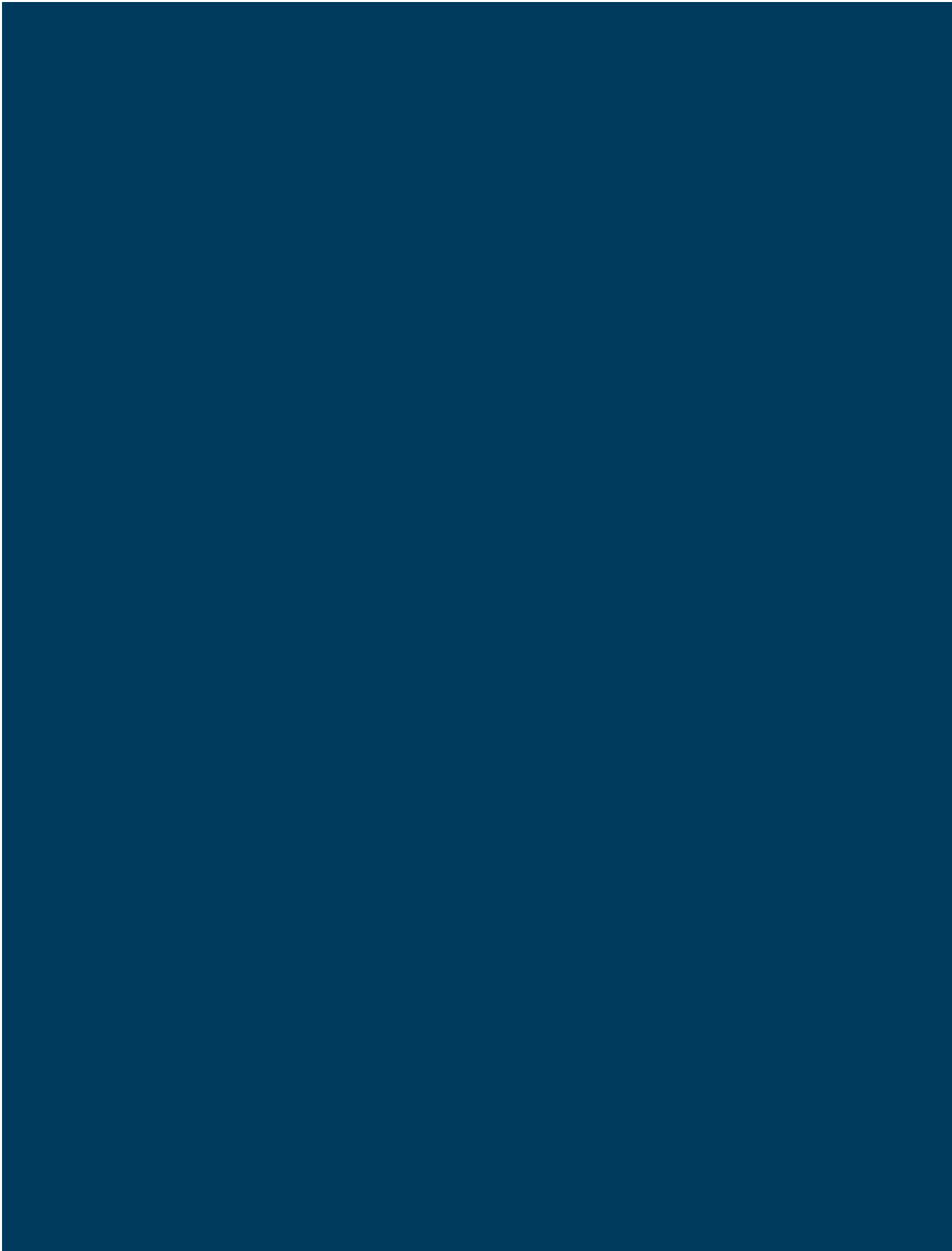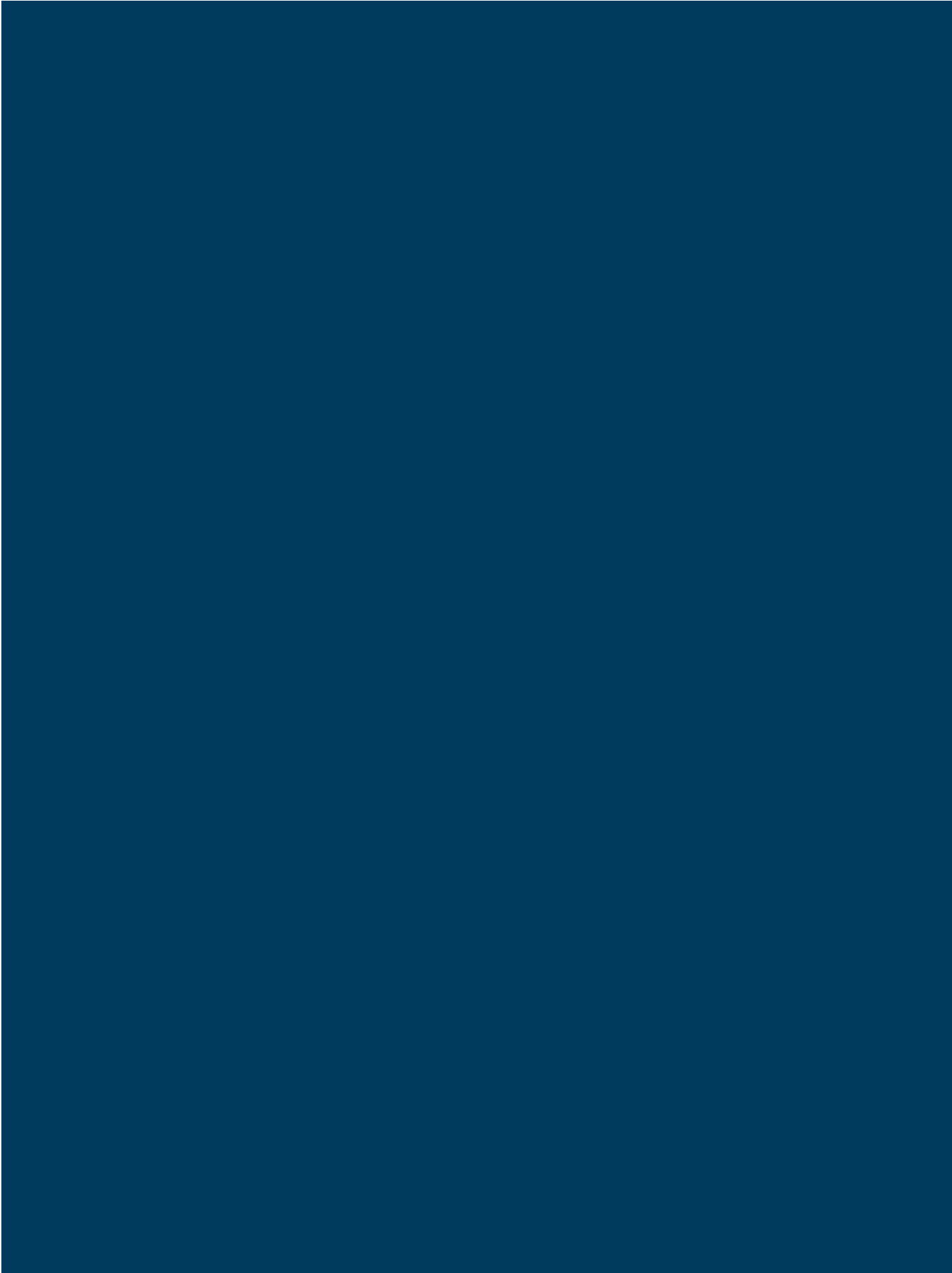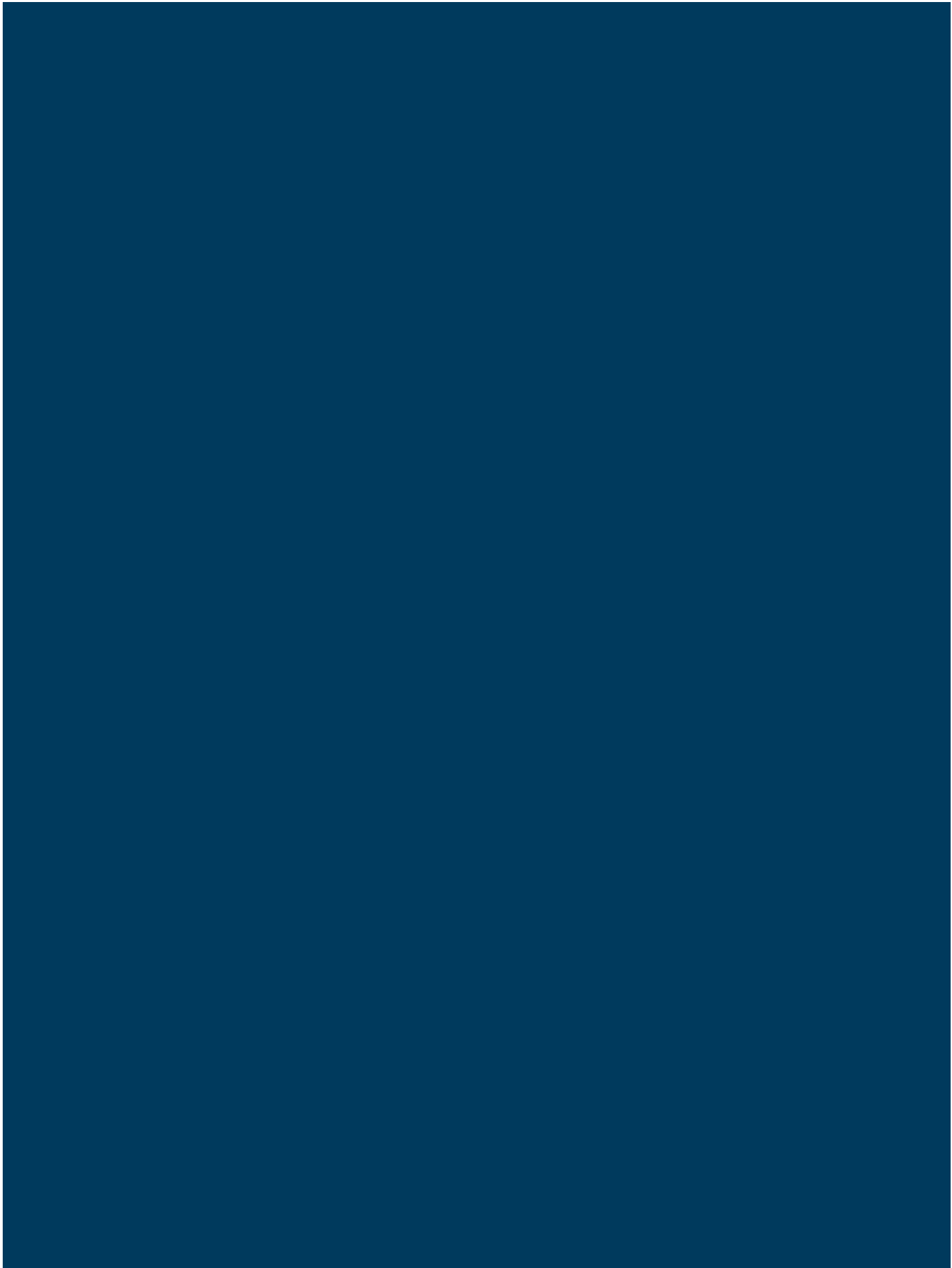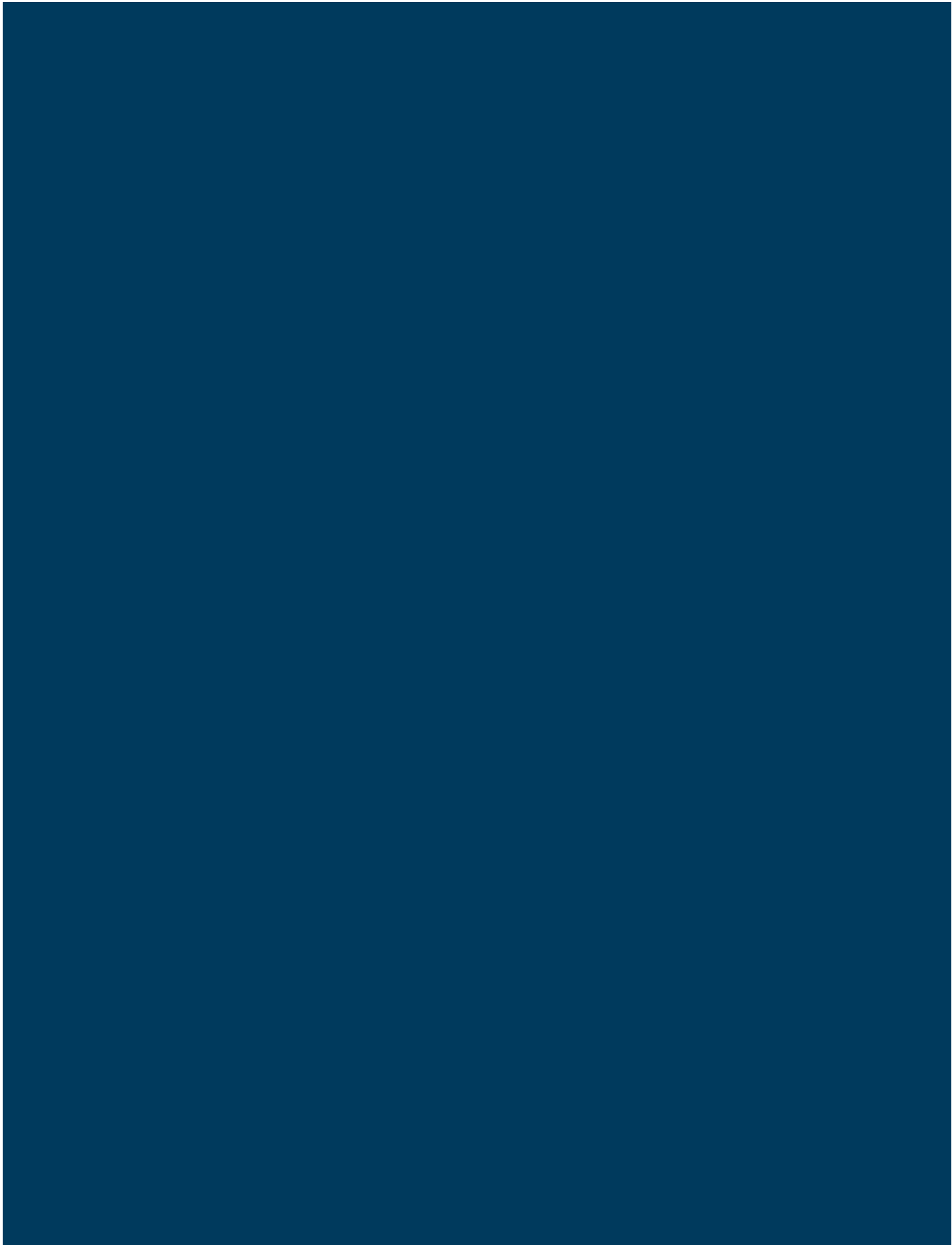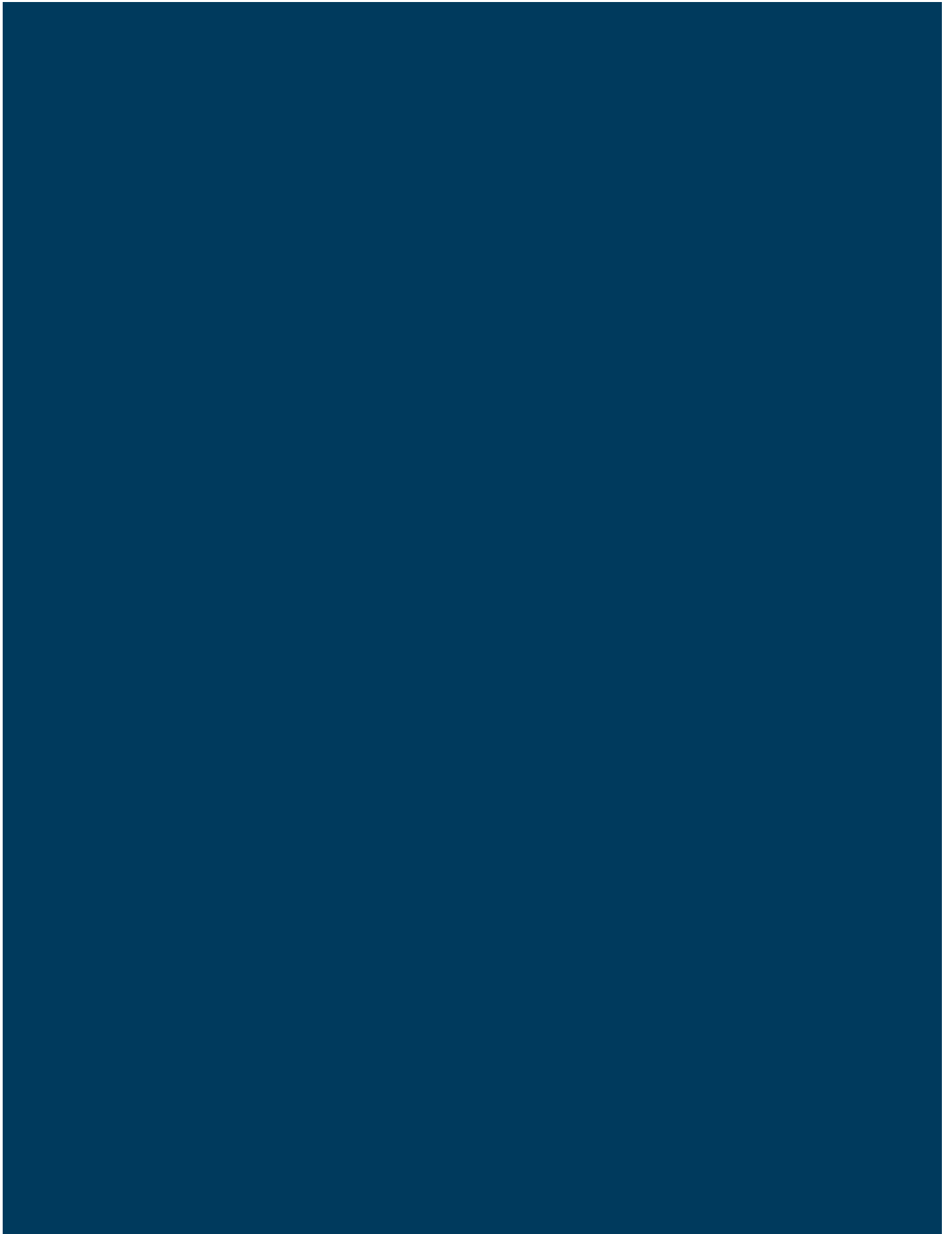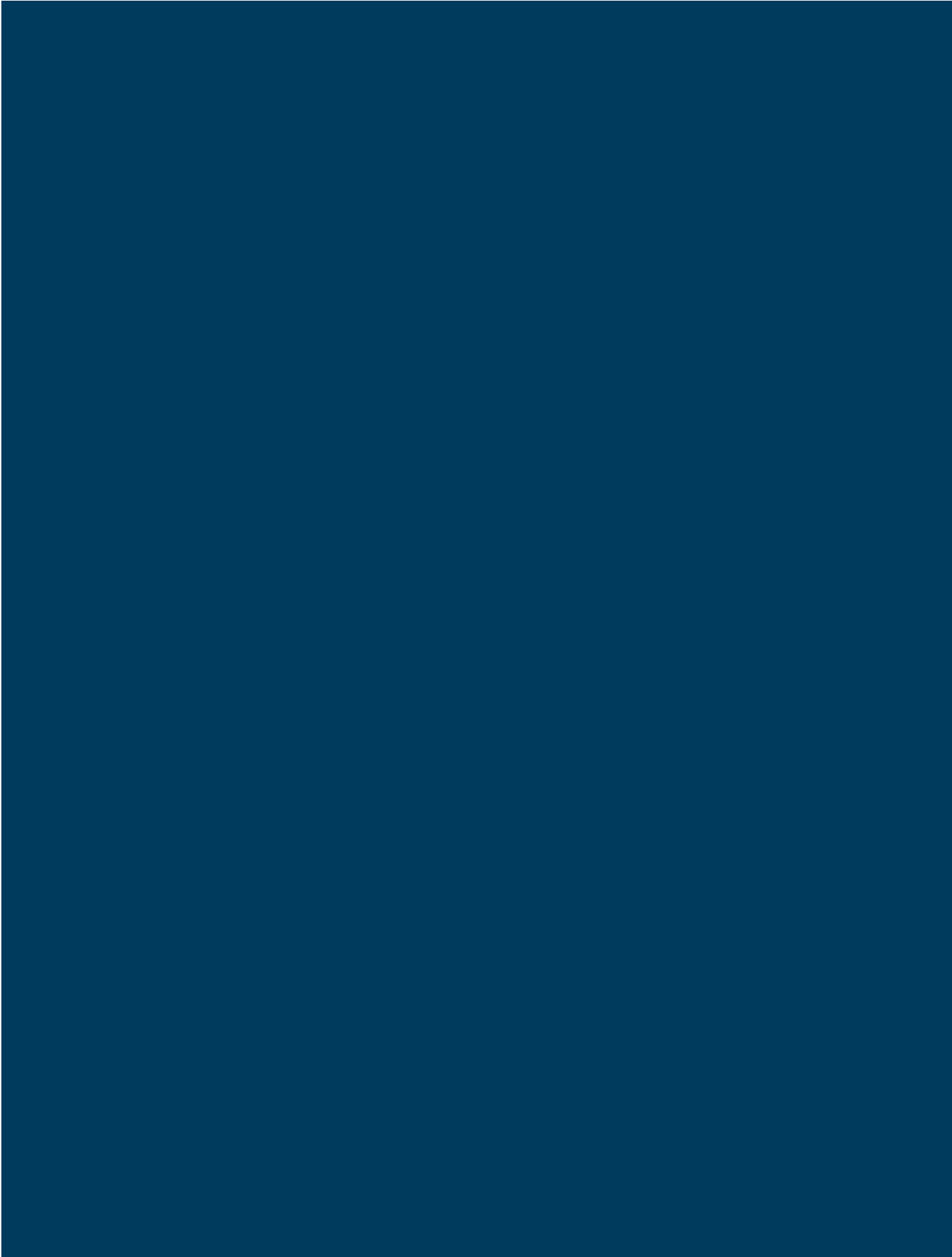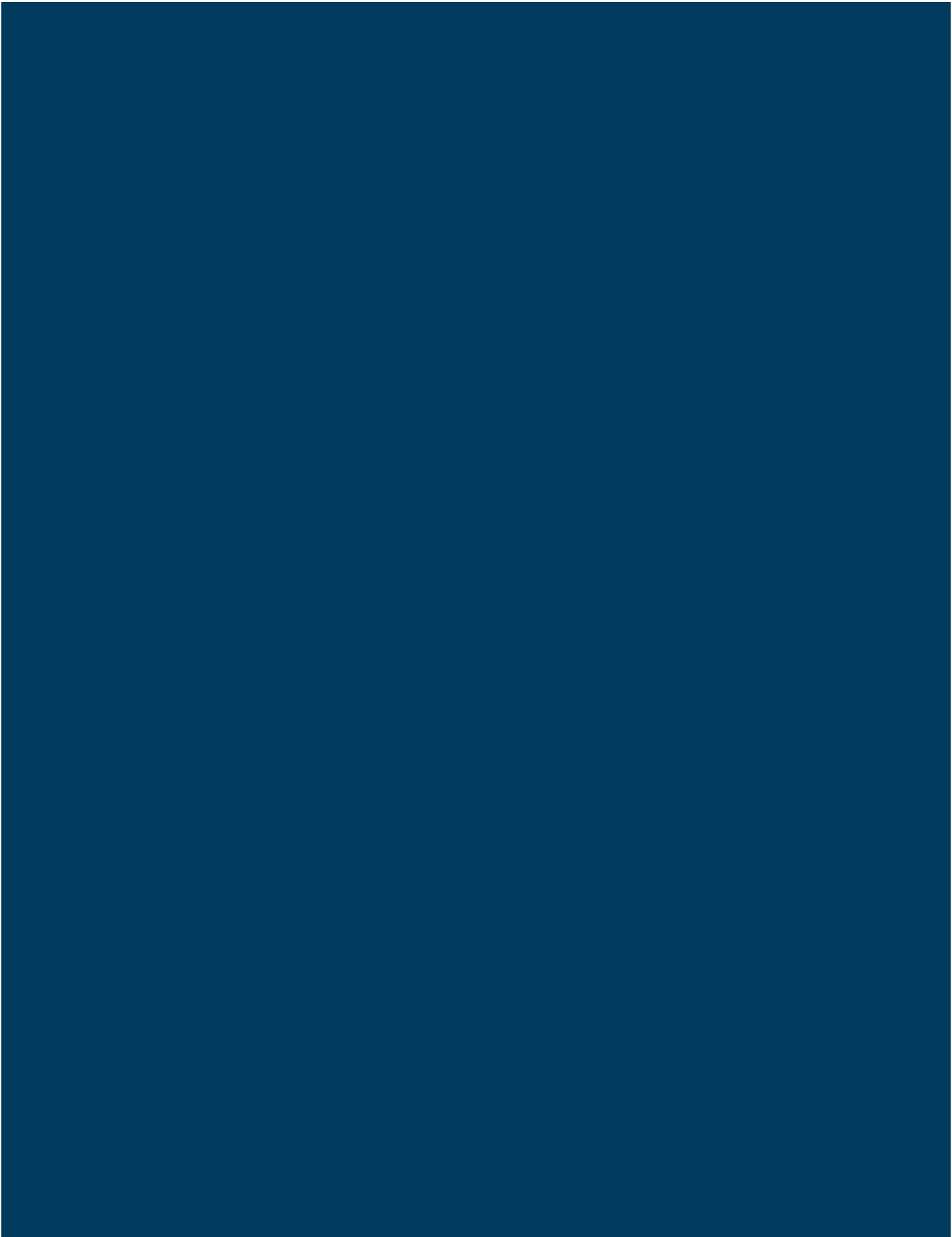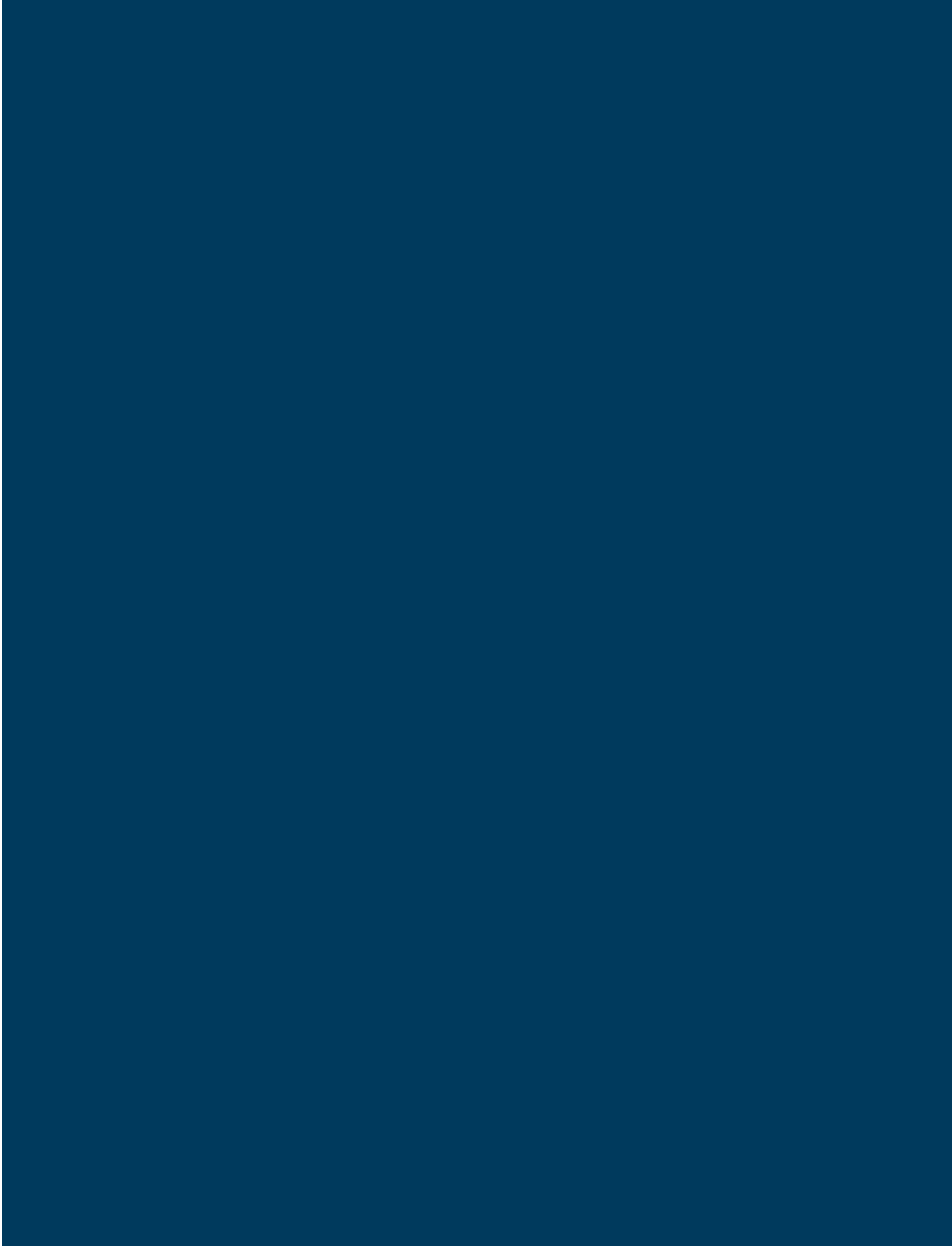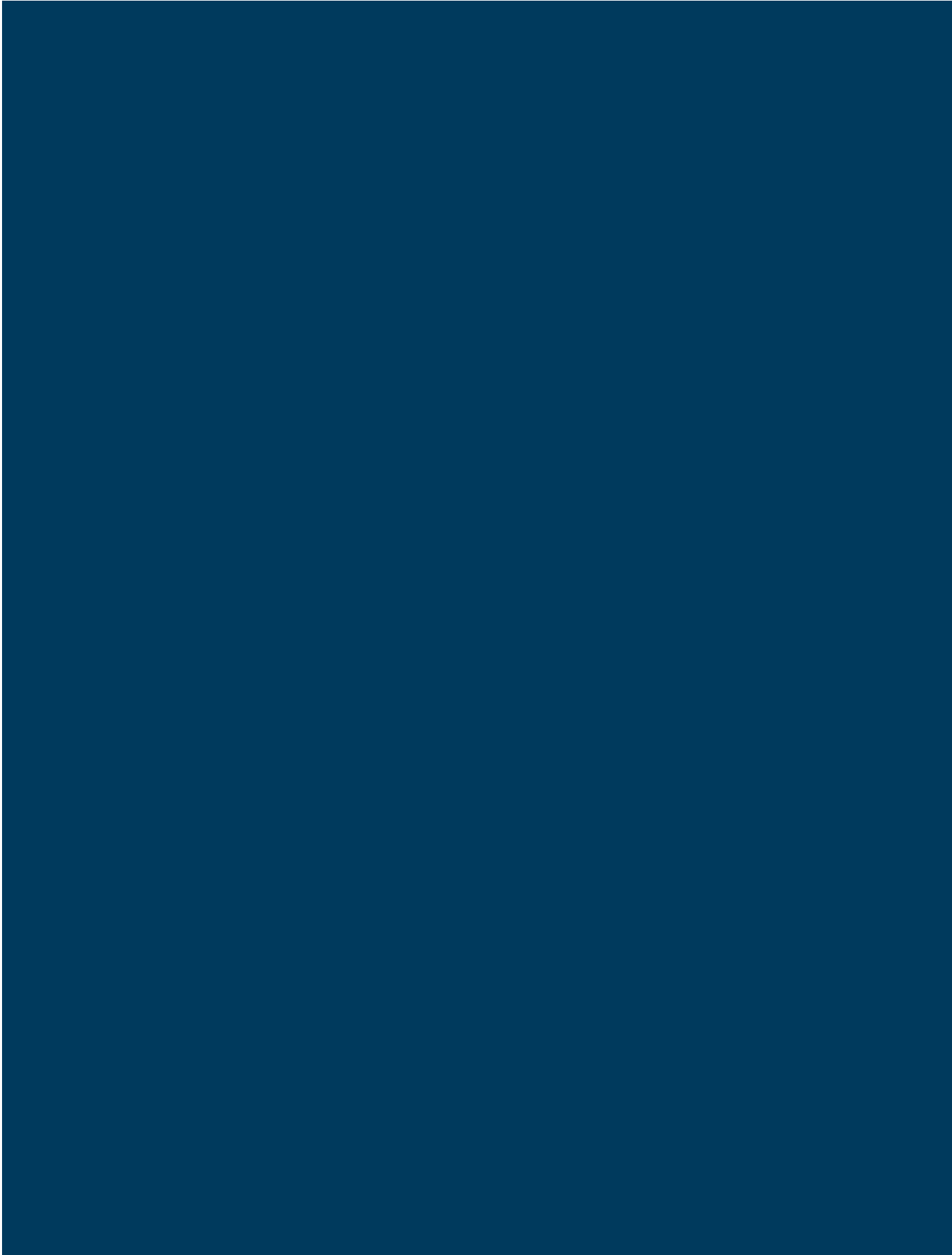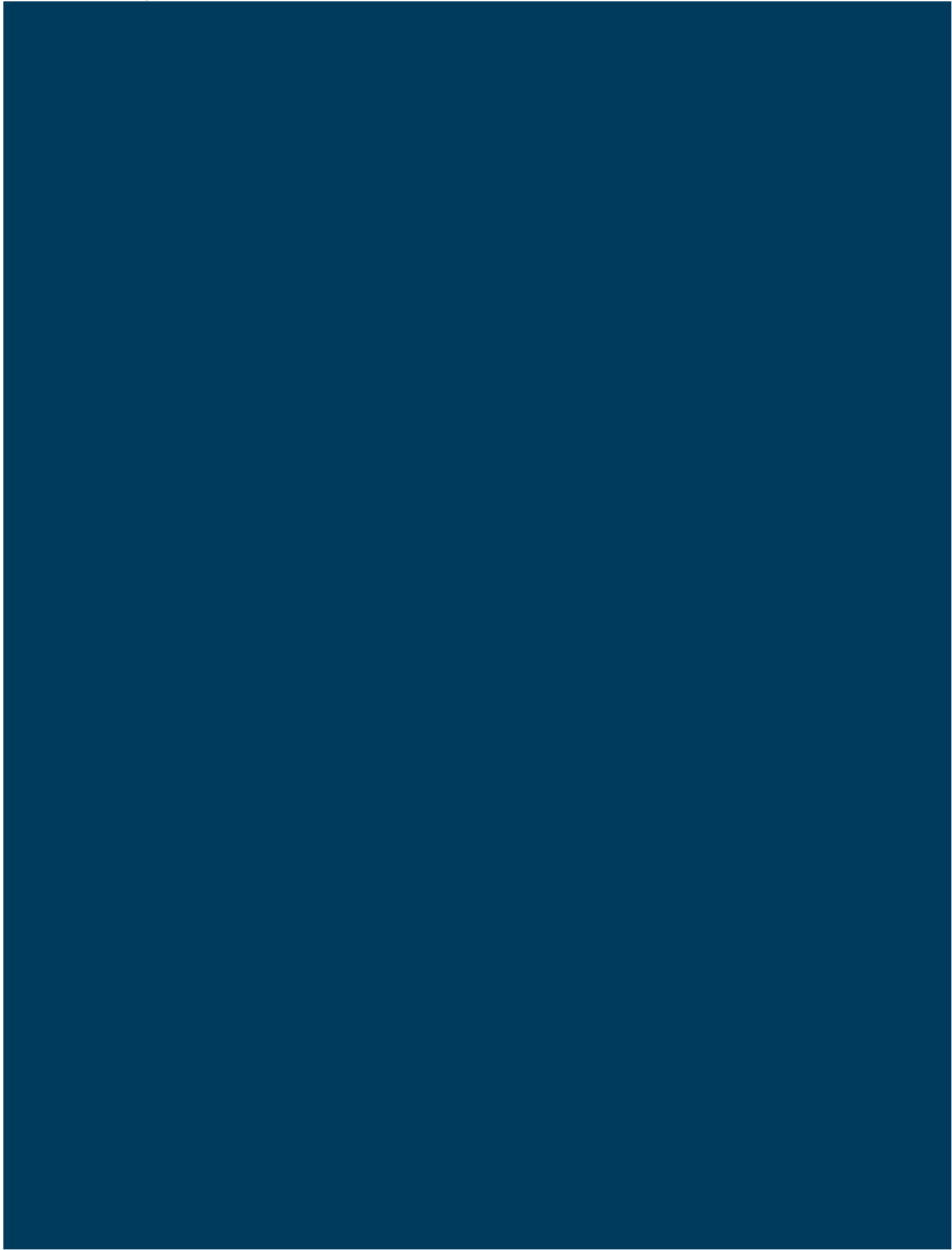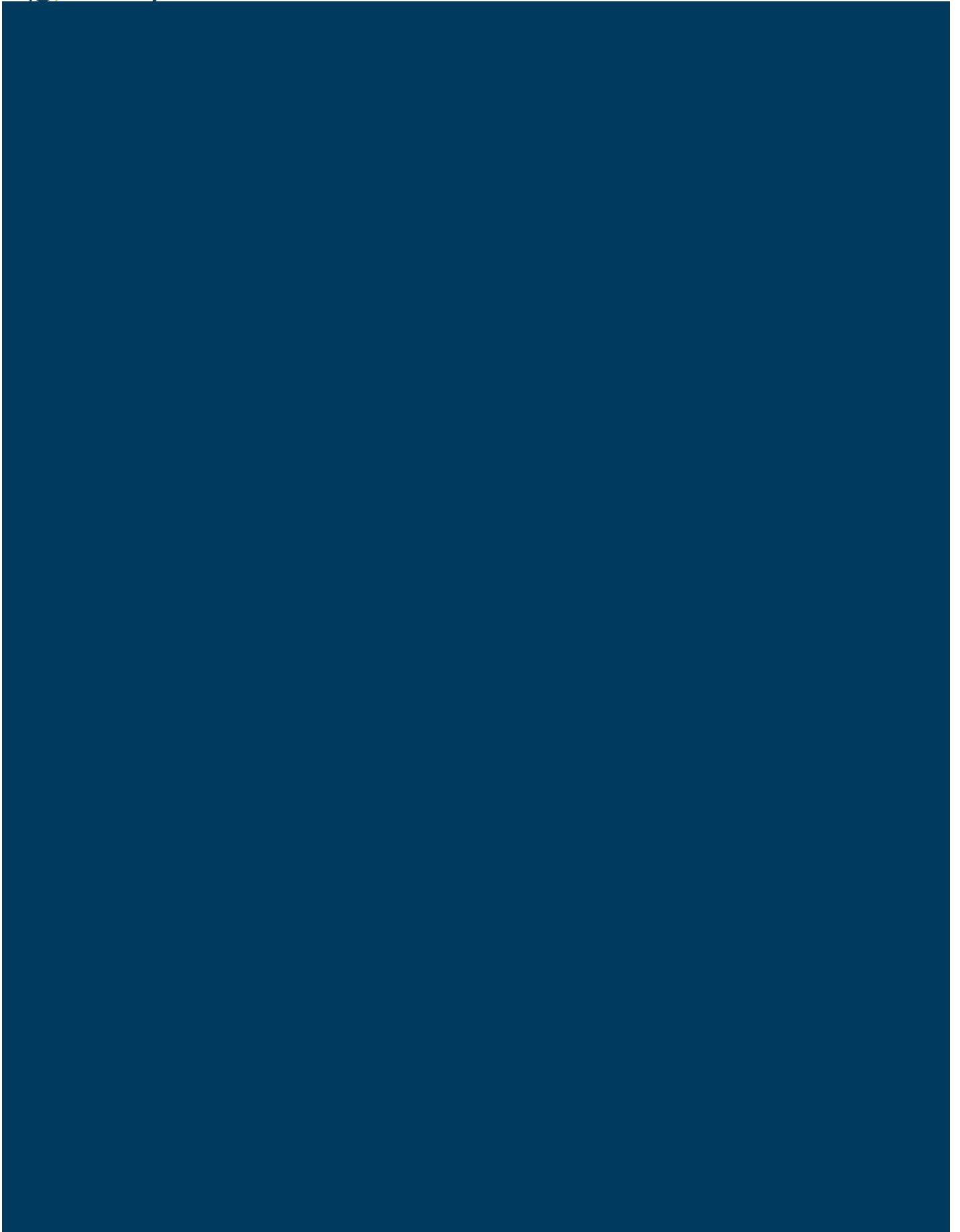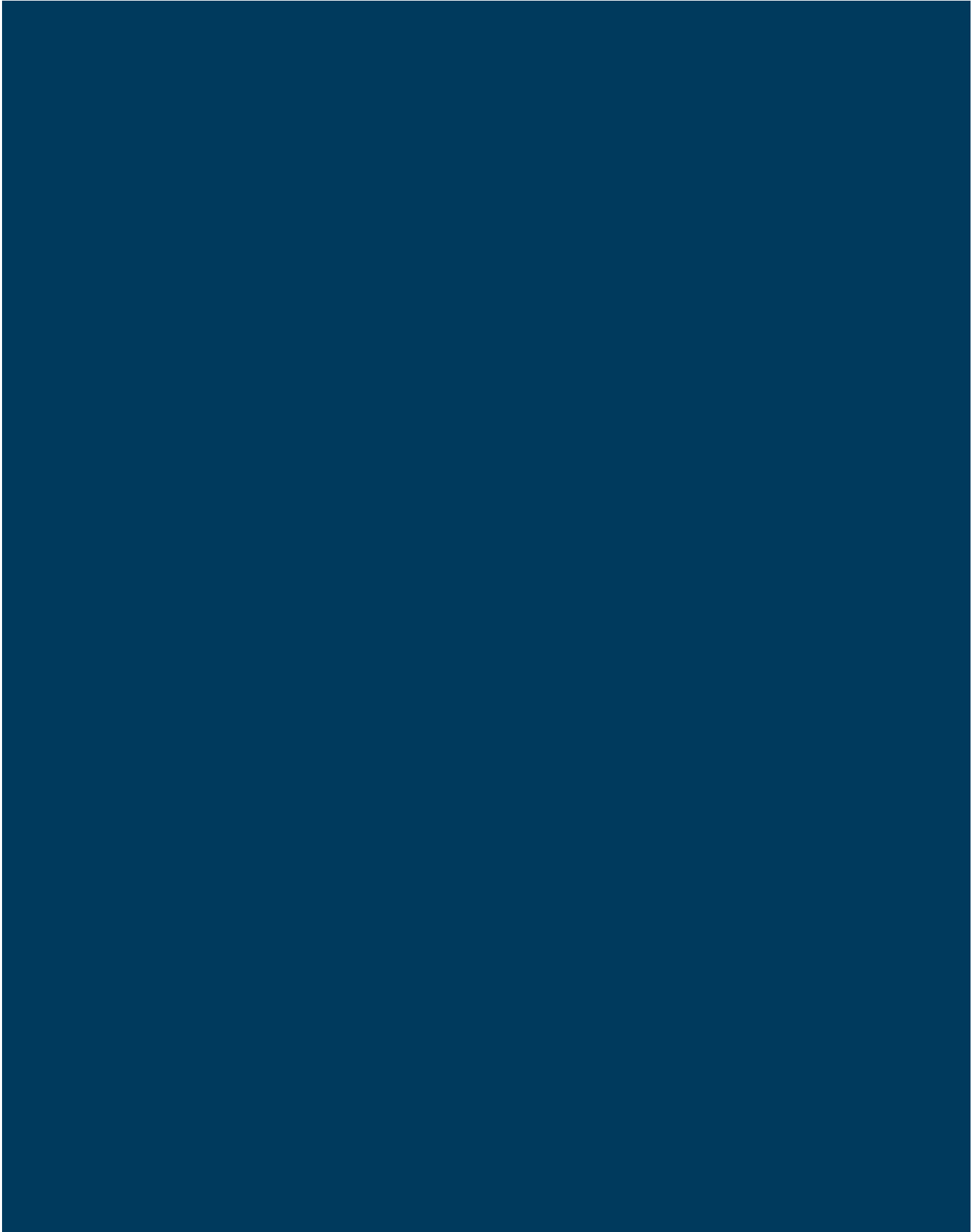
![BerryDunn logo]

F.4.b How Staff are Identified, Recruited, and Supported

b. Describe how staff will be identified, recruited, and supported by the vendor.

BerryDunn's team of over 850 includes subject matter expertise that spans government, private, and commercial sectors—especially those sectors critical to PRMP's success. BerryDunn's approach to identifying, recruiting, and supporting staff is team-first—focusing on the strengths of the team as opposed to the strengths of an individual. As needs are identified, BerryDunn leverages the team-first approach to identify the expertise, skillset, and personality needed and then identify the individual(s) well-suited to support the needs. In doing so, BerryDunn builds teams comprised of individuals with diverse backgrounds, skillsets, and strengths and teams that are highly capable of meeting clients' needs.

BerryDunn's approach toward identifying, recruiting, and supporting staff has been a critical factor in our success in supporting PRMP since 2019. When PRMP and BerryDunn first began their relationship in 2019, we brought with them a team of four professionals—each with a unique skillset and experience to help PRMP achieve their first MMIS certification. Today BerryDunn has identified, recruited, and supported over 30 full-time and trustworthy professionals of who have helped PRMP achieve impressive program milestones such as certification of their MEDITI3G solution, establishment of a PgMO, and approval of over 15 SPAs.

BerryDunn's staffing model to support this growth has been in place for over 30 years and spans the areas identified in Figure 32.

Figure 32: BerryDunn's Staffing Model

To help ensure BerryDunn's team members and clients receive the expertise necessary to exceed client expectations, our dedicated team of recruiters works with our leadership team to conduct workforce planning efforts on an annual basis.

Subsequent to these workforce planning efforts, our dedicated recruiting team executes the following strategies in support of their recruitment and sourcing approach:

- Posting of job openings on the company website, on social media channels, and on job boards

- Outreach to candidates within our candidate sourcing database

- Proactive and consistent outreach to industry proven sourcing agencies with candidates readily available to meet client needs

- Consistent outreach to BerryDunn's 850+ team members whom have deep relationships with industry work groups, the vendor community, and federal partners

To further assist with the recruitment and sourcing of candidates, we use a variety of tools and methods, including advertising with national associations such as the PMI®, utilizing LinkedIn's professional recruiting platform, and participating in college and university recruiting events.

During the selection and hiring stage, all potential BerryDunn employees are required to take the Predictive Index® (PI®) behavioral assessment. The PI® is a science-based assessment that provides BerryDunn hiring managers with accurate, actionable data quantifying the unique motivating needs and behavioral drives of potential employees. The results of the PI® are used by interview teams to analyze, align, and optimize our individuals and teams. The PI® is work-related, free of bias, valid, and reliable. It is designed to help employers comply with the Equal Employment Opportunity Commission's Uniform Guidelines on Employee Selection Procedures.

Candidates for each opening are interviewed by team members who understand the business need, the engagement, and BerryDunn—all pivotal elements in helping to ensure a candidate is a good fit. A background check is completed and candidate references are contacted as a part of the selection and hiring process.

As a part of each candidate's hiring process, they undergo a thorough onboarding program in their first several months that helps to ensure they have support necessary to understand the firm's processes and approach toward supporting client needs.

Over the years, the Puerto Rico engagement has put in place an onboarding program for those resources joining the engagement. Every resource new to EOMC services in Puerto Rico undergoes a two-week onboarding program that helps ensure they have a baseline understanding of PRMP, its MES, BerryDunn's EOMC services and team, and the resources' role and responsibilities. This helps ensure that resources are ready and best equipped to fulfill PRMP's needs.

"Our human capital is the most valuable asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that our employees invest in their work represents a significant part of not only our culture, but our reputation and company's achievement as well. We embrace and encourage (our) employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique." – Society for Human Resource Management

BerryDunn makes it a top priority to retain our experienced staff. As an intentionally developmental organization, BerryDunn's talent development program is just one of the many staff retention strategies BerryDunn deploys to retain staff and meet client needs. Some additional staff retention efforts include:

- Supporting a strong people-focused culture across the firm

- Offering generous benefits including a responsible paid time off program and paid family medical leave

- Providing a robust learning and development program

- Supporting staff's individual development goals with a formal annual planning process, quarterly updates, and biannual check-ins on development progress for our staff

- Offering a mentoring program

- Conducting employee satisfaction surveys and creating action plans to address areas of improvement

Because of this focus, our turnover consistently measures well below industry averages. While we believe in the importance of continuity, we also understand that staff rotation is sometimes a necessity and beneficial to our clients, and we have the depth of professional resources to accommodate requests when necessary.

As an additional example of BerryDunn's commitment to identifying, recruiting, and supporting staff in support of PRMP's business needed and in response to this RFP, BerryDunn's business leads—the same ones currently supporting PRMP—scoped out the tasks necessary to support this work, drafted their respective service area responses, assigned hours necessary to get the work done, and then worked with program managers and the lead program manager to review and finalize the hours and assign resources with the right expertise. As needs beyond this RFP are identified, BerryDunn will work with these business leads and hiring managers to use this same approach and staffing model—complete with workforce planning, recruiting, hiring, talent development, and workforce retention—to help ensure PRMP's needs are met.

Realizing that PRMP's needs for support require a team that can scale up and scale down, BerryDunn deploys the following strategies to help ensure adequate levels of staffing and more importantly adequate levels support for PRMP and BerryDunn teams:

- Business leads review and update project schedules, high utilization tasks, and/or resources who may be overallocated during those instances of high utilization

- Business leads update resource hours projections on a twice a month basis

- Program managers and the lead program manager reviews hours projections as a part of their biweekly meeting and individual check-ins with business leads to help inform existing or projected resource needs

- Business leads, program managers, lead program manager, and the account manager receive reports that allow for monitoring of utilization and consideration for updates to hours projections

The above approach heavily relies upon the partnership of the business lead and their PRMP counterpart to agree on the service area priorities, deliverables, and artifacts and to approve of said information in a timely fashion. Delays that might be due to unclear schedules, changes in priorities, competing priorities and/or other causes impact the BerryDunn team's ability to identify, recruit, and support PRMP as well as BerryDunn staff. These instances have the potential to lead to staff arrangements that are insufficient and/or misaligned to PRMP's needs and are what we strive to avoid. By taking this proactive approach toward staff management, BerryDunn mitigates the aforementioned risk, and is able to develop a PRMP and BerryDunn team that receives the support necessary to be successful.

BerryDunn's onboarding program has been critical in helping to minimize time needed from PRMP and to help ensure resources are onboarding quickly and supported in meeting PRMP's needs. The following topics are covered as a part of each resource's onboarding to the Puerto Rico engagement, and the following will continue to be provided to new EOMC team members:

- History of PRMP's MES journey

- PRMP MES structure

- The EOMC SOW as well as each resource's role supporting PRMP and the BerryDunn team

- PRMP and BerryDunn service area descriptions and points of contact

- EOMC norms, roles, and responsibilities

- A detailed list of tasks they should execute within their first week of being in PRMP

To aid in resources becoming accustomed to their role and responsibilities in Puerto Rico, BerryDunn also provides resources with an Orientation and Administrative Guide that includes topics such as:

- Detailed descriptions of prior EOMC documentation produced in support of PRMP

- Detailed description of the work completed in support of PRMP

- Detailed guidance to aid in producing documentation for PRMP

- PRMP, Vendor, and BerryDunn organizational charts

BerryDunn's proposed team has a demonstrated understanding of the requirements set forth within this RFP and will reinforce that understanding as a part of BerryDunn's contract kickoff for this RFP, BerryDunn will host both an internal kickoff meeting focused on the following:

- Requirements and proposed approach set forth in the RFP and our proposal

- Team's organizational structure as well as each role's role and responsibilities

- SLAs and our approach toward management and tracking adherence

- Differences in scope for new contract in comparison to prior contracts

- Next steps to aid in orienting PRMP to the new contract

- Helpful documents to aide in team members executing the roles and responsibilities identified within this RFP

By leveraging BerryDunn's proposed team of experienced professionals PRMP can rely on our deep understanding of PRMP, the RFP requirements, and our roles and responsibilities to enable PRMP's continued progress.

Time and time again, people who have chosen to work for BerryDunn say the decision was easy after meeting some of the people here and getting a feel for our supportive culture. Our clients often tell us that we've got the nicest people in the world—and that's because our people are genuinely nice people who love working with our clients. Furthermore, BerryDunn is committed to finding smart, talented people who are up to that task and who have the right attitude to make it happen.

F.4.c   Staff Understanding of Roles and Responsibilities

c. Describe how the proposed staff will understand their roles and responsibilities based on the requirements described in this RFP.

PRMP has partnered with BerryDunn's team of professionals to support many of the EOMC RFP requirements since 2019. BerryDunn's EOMC support has now broadened to be focused in all areas identified within this RFP. These past four-plus years have helped our team gain a great understanding of both the requirements within this RFP, as well as additional PRMP needs. The BerryDunn team's understanding of their roles and responsibilities thus far has led to PRMP successes such as achievement of two CMS MES certifications, the establishment of a procurement office that's rooted in industry best practice, and the development of MES Roadmaps and program policies that outshine some of the most mature Medicaid programs in the country.

BerryDunn's proposed team is comprised of over 30 team members with demonstrated experience supporting PRMP and a team that has experience spanning 31 number of state Medicaid agencies. As PRMP's proven, trusted, and experienced partner, PRMP can rest assured that the BerryDunn team understands the RFP's requirements, their roles and responsibilities, and the roles and responsibilities of others within PRMP.

The following are BerryDunn's understanding of our roles and responsibilities as outlined within this RFP:

- PRMP needs a partner with vast understanding of their enterprise as well as their needs. A requirement that we happily fulfill given our years of experience partnering with PRMP to achieve their goals.

- PRMP's time is precious and limited, so having a partner who can quickly deliver in their efforts is paramount. Over the years, we have not only demonstrated our ability to respond quickly to PRMP's needs; but have also demonstrated our ability to be flexible when priorities change. This has been demonstrated in instances whereby procurements needed to be expedited and/or responses to federal partners be drafted overnight.

- PRMP requires expertise that is grounded in the experience of other state Medicaid agencies yet able to be applied to the needs of PRMP. BerryDunn brings to PRMP team members that have experience that spans nearly all of the 56 states and territories, and with them the unique understanding of PRMP's policies, processes, and needs. The team's expertise has been put on display through efforts like when we assisted PRMP with their PHE Unwind effort, or when we helped PRMP prepare for the first PERM audit, as well as through PRMP's journey to expand the policies offered to Puerto Rico Medicaid beneficiaries.

PRMP needs a partner who will remain objective, be succinct in their findings, and work collaboratively with vendors in their enterprise. BerryDunn prides itself on its independence from system vendors and has leveraged that independence to help provide analyses on vendor responses to RFPs, and to work collaboratively with the ePMO and system vendor in support of MES implementations. PRMP needs a trusted partner who is up to date on the latest local and federal guidance, and who is aware of how the industry is meeting these requirements. BerryDunn prides itself on the internal supporting structures it has in place to help stay on top of local and federal requirements and guidance, industry trends, and how state Medicaid agencies are meeting federal requirements. BerryDunn's employees dedicate a

portion of their time toward involvement with industry work groups, internal communities of practice, and/or industry events to help ensure we are staying apprised of the latest guidance and approaches.

Further, BerryDunn has a team that monitors and synthesizes federal guidance being released on an ongoing basis. These approaches and more have led to instances whereby BerryDunn has shared guidance with PRMP that has led to policy changes, it has helped shape PRMP's current approach to certification efforts, and it has reduced PRMP's required level-of-effort to maintain compliance with efforts such as MITA and PERM. PRMP needs a partner who will help increase their understanding of local and federal requirements as well as other state Medicaid agencies to help decrease reliance on vendors and to help enhance the team's ability to independently manage their enterprise. BerryDunn's development-focused mindset is at the core of who we are; and since 2019, we have been able to instill in PRMP a foundation across the very services detailed in this RFP from which the PRMP currently operates. This is detailed further within **Section F.3**; however, some notable ones include helping to establish a PgMO structure and overall governance for the PRMP MES, helping to establish an objective procurement process, and helping to align PRMP with federal requirements in the APD area.

Lastly, PRMP needs a partner who is going to increase federal transparency into the program and enhance PRMP's credibility with both the community, other state Medicaid agencies, and federal partners. BerryDunn has demonstrated this time and time again through instances such as supporting PRMP with speaking at federal and local conferences, support in preparing for federal audits, and with support in obtaining PRMP's first two SMC of two MES modules. The EOMC support PRMP needs is extensive and requires a deep understanding of PRMP's existing enterprise. Without this deep understanding, resources are likely to ask questions and make requests that lead to unnecessary work, duplication of services, and lost time. BerryDunn learned long ago, that in order for the engagement to support a scalable staffing approach, we would need to have onboarding processes that provided timely and accurate information to new resources joining the information. We also knew that this information would need to be supplemented with trainings and/or information sharing sessions tailored to each resource's role. In support of this need, in 2020 BerryDunn developed an onboarding program and an onboarding and administrative guide for resources joining the Puerto Rico engagement.

BerryDunn's understanding of the roles and responsibilities of an EOMC vendor are not only known, it's who we are; and we look forward to continuing our longstanding relationship to support PRMP in the PgMO and Medicaid enterprise journey.

F.4.d   Back-Up Staff Designated

d.   Describe how back up staff will be designated.

BerryDunn employs over 850 staff members. Our Consulting Services Team includes experts in health analytics, healthcare non-for-profit, auditing, program management, compliance, certification, information systems security, etc. Of the 300 in our Consulting Services Team, more than 120 are in our Medicaid Practice Group. As the need for back-up staff is identified, we will leverage the depth of experience and expertise that our consultants provide.

BerryDunn's initial staffing plan is structured such that PRMP's requested service areas are grouped into programs or projects that have similarities that when managed together help to enhance effectiveness and efficiencies. Each program is comprised of service areas that have core teams. Each core team is supported by a team of variable staff—each of whom possess similar and/or complementary experience to the core team. The variable staff approach provides additional capacity to be responsive to Puerto Rico's business needs.

To help ensure we are ready to respond to Puerto Rico's needs when teams are focusing on other PRMP priorities or during planned time off, BerryDunn exercises the following approach: Leveraging the business lead's service area schedules and hourly staff projections, program managers work with other program managers, the lead program manager, and/or other business leads to help ensure sufficient support is available to support PRMP's needs. Each service area schedule accounts for planned events such as holidays, planned personal time off, conferences, and trainings. In the event team members are planning to be unavailable, it is their responsibility to work with their business lead and/or program manager to help ensure coverage that is responsive to PRMP's business needs.

As a developmentally focused firm, BerryDunn prides itself on our ability to develop, mentor, and coach team member's development paths. As a part of each employee's annual development plan, members of BerryDunn's management team engage in conversations with resources to understand their development interests and their development needs. These development interests and needs are then supported by various individuals across the team—leading to educational sessions, cross-training, and partnered practice which has yielded rapid growth of some of the very leaders PRMP has grown to value. If team members are out for extended periods of time, BerryDunn relies upon the approach detailed in Section F.4.b to help ensure back-up staff are identified and engaged. Although this is a rare occurrence, in these instances BerryDunn will work hand-in-hand with PRMP to help ensure the resource who is stepping into back-fill for another team members have the necessary experience and the ability to meet PRMP's needs.

F.4.e   Continuity in Responsibilities

e.   Describe how continuity responsibilities will occur should a staff member need to be replaced.

BerryDunn is committed to providing continuity in our team for the MES EOMC project, as we do all our projects. PRMP has experienced this high level of continuity with the BerryDunn team already. PRMP needs a partner who is committed to their success, and BerryDunn's response commits the proposed team to PRMP's journey. BerryDunn also understands that, as with any journey, additional needs, priorities and/or performance can lead to a need for a team member to be replaced. In the event of team members needing to be replaced, BerryDunn will work hand-in-hand with PRMP as we've done before to identify team members with the necessary experience and/or ability to fulfill PRMP's needs.

To help ensure the experience necessary to support PRMP and/or ability is satisfied in the event of team members needing to be replaced, BerryDunn will use the approach detailed in Section F.4.b of this response and thus look to our existing PRMP team, our team of over 850+ experienced consultants, and/or via our recruiting networks to help ensure we maintain continuity of services and thus continue to fulfill PRMP's needs.

F.4.f   Management Structure, Staff Management Process, and Talent Management

f.   Describe the management structure, staff management process and how talent management support will be provided.
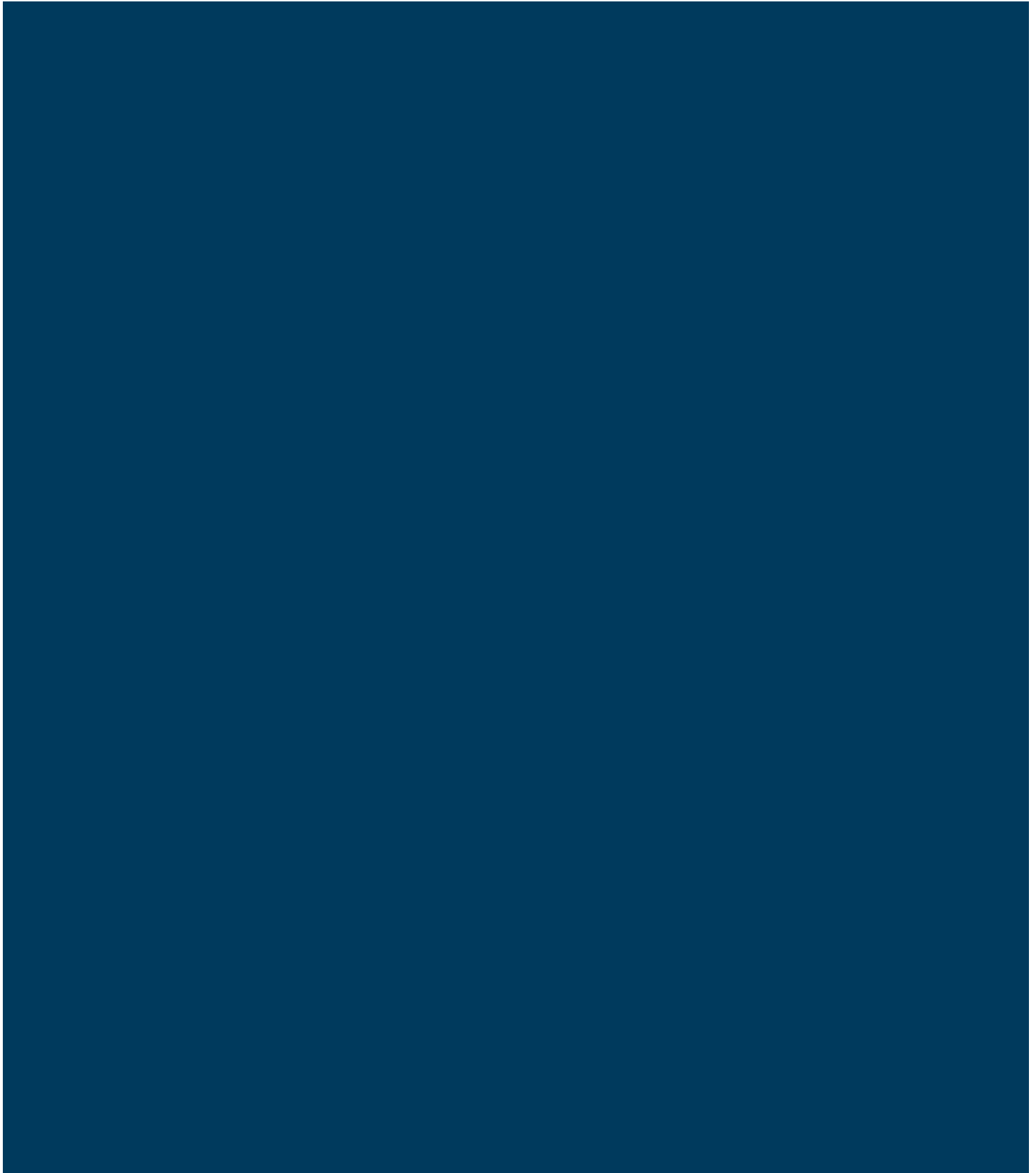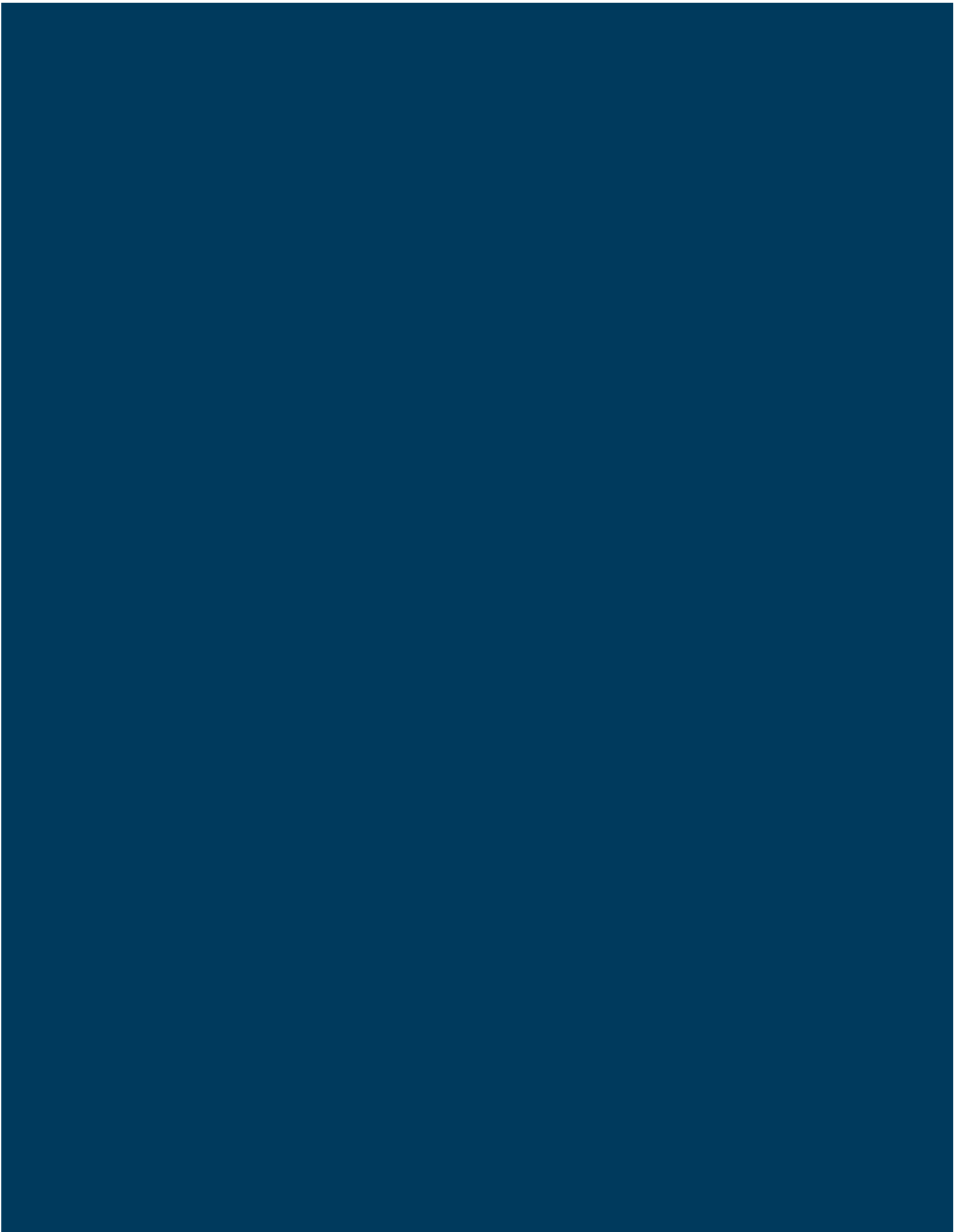
F.4.g   Staff Remediation Plan

g.   In the event a staff remediation plan is requested by the Department, describe how you will provide oversite and manage the remediation plan.

Should PRMP identify concerns with BerryDunn's (or a specific team member's) performance, services, or deliverables, our lead program manager will work with PRMP to understand the specific concerns and establish a plan for addressing the concern and mitigate future risks to the project. This plan may include collaboration with the account manager, program managers, or assigned business leads. We have established processes for escalating issues within BerryDunn's organization, which helps to ensure continual quality services to PRMP and proactive resolution of issues related to performance.

In the event a staff remediation plan is requested, BerryDunn will work with PRMP to execute a remediation plan that leverages BerryDunn's staff management process and includes but is not limited to:

- Identified performance issue(s)

- PRMP's performance expectation(s)

- A root cause analysis of the identified performance issue(s)

- Action plan for identified issue(s)

- Initial timeline for staff remediation

- Related RFP and contract requirement(s)

- Success measures

BerryDunn will work with PRMP to review and finalize the staff remediation plan, and then will monitor its implementation up through achievement of the remediation plan's success measures.

F.5 Approach to Overall Requirements

Please describe in narrative form how your organization will meet the following requirements:

F.5.a Approach to Managing the Entire Contract

a. *Describe what you believe will be the most effective approach to managing the entire contract.*
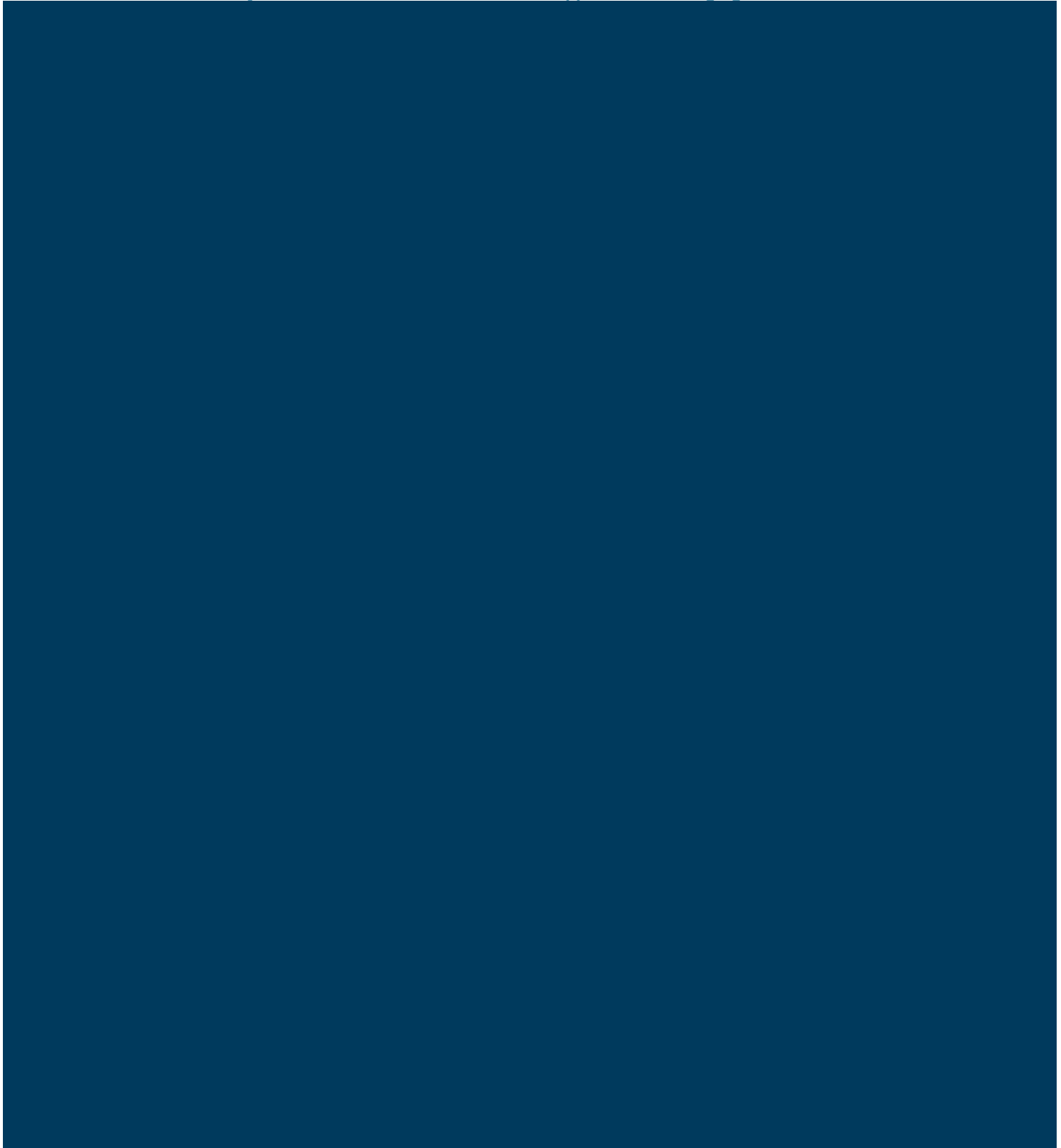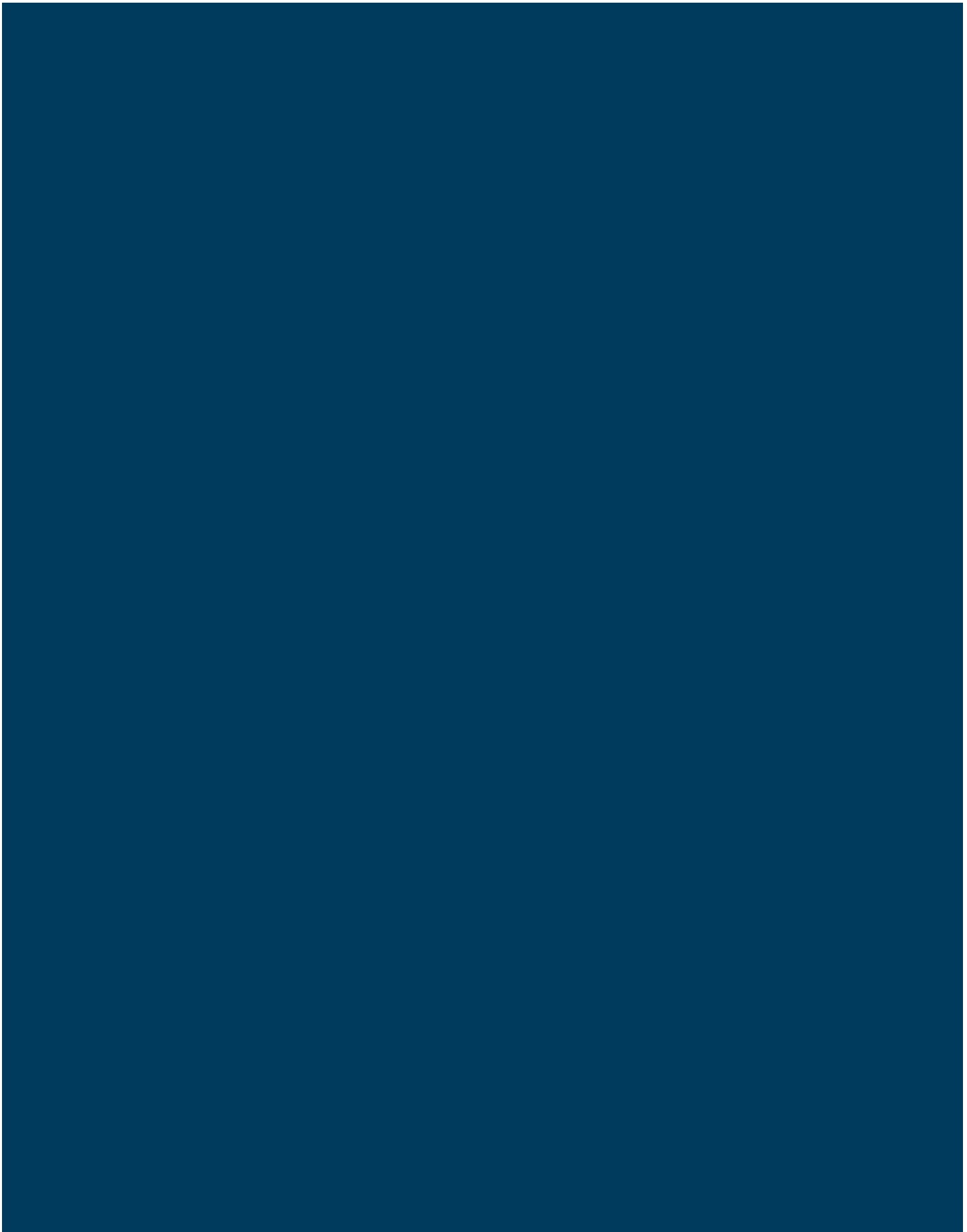
F.5.b   Monitor and Report SLAs

b.   Describe how SLA will be monitored and reported.

F.5.c   Manage Staffing/Resource Needs and Changes

c.   Describe how staffing/resource needs or changes will be managed.

Resource or staffing management involves the monitoring, controlling, and adapting of resources based on project metrics to help ensure the program is successful. This activity involves resource planning to identify, document, and assign program roles and responsibilities to various components of the program, along with the close management of resource projections and utilization across those interdependent areas of the program.

Managing staffing/resource needs and changes are the primary responsibility of the PgMT or the Account Manager, Lead Program Manager, Program Leads, and Business Leads. The PgMT uses the PMBOK® Guide as their guide towards planning, creating, and fulfilling staffing and resource management responsibilities. Resource planning is essential to determine and help ensure that the sufficient type and number of resources are available for successful completion of the project. The key reasons for resource planning are to identify project level staff, levels of authority, and the amount of effort needed to manage projects based on the levels of complexity. Effective resource planning helps prevent over allocation of work which can lead to stress, burnout, and underutilization of resources, which can cause staff dissatisfaction.

As detailed in Section F.4.b, BerryDunn understands PRMP's need for a team that can scale up and scale down for planned or in-flight work. In support of that need, BerryDunn deploys the following strategies to managing staffing / resource needs or changes:

- Business leads review and update project schedules and identify high utilization tasks and resources who may be overallocated

- Business leads update resource hours projections twice a month

- Program managers and the lead program manager reviews hours projections as a part of their biweekly meeting and individual check-ins with business leads to help inform PRMP's existing or projected resource needs and changes to resources

- Business leads, program managers, lead program manager, and the account manager receive reports that allow for monitoring of utilization and consideration for updates to hours projections, resource needs, and resource changes

As noted in Section F.4.b, the approach above heavily relies upon the partnership of the business lead and their PRMP counterpart to not only agree on the service area priorities, deliverables, and artifacts but to also approve information in a timely fashion. Delays due to unclear schedules, changes in priorities, competing priorities or other causes impact our team's ability to identify, recruit, and support PRMP and BerryDunn staff. These instances have the potential to lead to staff arrangements that are insufficient and/or misaligned to PRMP's needs and what we try to avoid. By taking this proactive approach toward staff management, BerryDunn helps to mitigates this risk and supports a collaborative team that receives adequate support for each of their service areas.

When planning for requests for other EOMC support or for changes in PRMP's priorities, BerryDunn will continue to rely upon the depth of BerryDunn's 850+ team members to help resource projects just like we've previously done when PRMP requested support in the business areas of OCM, EDW, and provider credentialing.

As PRMP's business needs change and our team expands, BerryDunn's EOMC team will call upon their onboarding program to help streamline onboarding and minimize resource gaps in knowledge and understanding of the PRMP and its Medicaid enterprise. For more information on BerryDunn's EOMC team's onboarding, please refer to Section F.4.b.

As done since 2019, BerryDunn is committed to helping maintain qualified and capable resources to help ensure fulfillment of RFP scope and PRMP's goals and objectives—irrespective of staffing needs and/or changes. We look forward to collaborating with PRMP to manage staffing and resource needs in a manner that helps enable PRMP's success.

F.5.d   Communication Plan

d.   Describe how the Communication Plan will include all stakeholders, your approach to stakeholder analysis and how the communications will be managed.

Per the PMBOK® Guide, the purpose of a Communications Management Plan is to describe how project communications will be planned, structured, implemented, and monitored for effectiveness. PMBOK® Guide indicates that the Communications Management Plan should address how a vendor will determine and manage topics such as:

- Information to be communicated, including language, format, content, and level of detail

- Escalation processes

- Time frame and frequency for the distribution of required information and receipt of acknowledgment or response, if applicable

- Person or groups who will receive the information, including information about their needs, requirements, and expectations

- Methods or technologies used to convey the information, such as memos, email, press releases, or social media

- Resources assigned and allocated for communication activities, including time and budget

- Method for updating and refining the Communications Management Plan as the project progresses and develops, such as when the stakeholder community changes as the project moves through different phases

Project communication includes the processes necessary to help ensure that the information needs of the project and its stakeholders are met through the development of effective and efficient communications strategies.

The PRMP leadership team is comprised of a limited number of individuals, and thus the need for streamlined and effective communications is paramount to the success of each MES initiative. BerryDunn will work with PRMP's service area project leads to limit the number of communication channels to those necessary for enabling service area's success. Our team will work with their PRMP counterpart to help ensure that the substance of communications over those channels is effective to assist in meeting the project objectives.

The PMBOK® Guide outlines the processes for communications management in three areas. Figure 34 illustrates the communications management processes. The associated steps are described in the following subsections.

Figure 34: Communication Management Processes

The following sections detail BerryDunn's approach toward each of the communication management processes.

F.5.d.1 Plan Communication

The first step in effective communication planning is developing communication requirements and standards relevant to project needs and stakeholder capabilities. The foundation of the communications approach stems from the understanding that effective communication comes from addressing the respective needs of stakeholders across a project. Key insights from a stakeholder assessment enable a project team to tailor the communications approach for the internal and external groups, respectively.

Our team's more than four years of experience supporting PRMP's Medicaid enterprise gives us a deep understanding of PRMP's communication requirements and preferences. Central to these requirements are the following:

- **Deep expertise and a trusted partner who is willingness to educate PRMP to help enable their success and their understanding of federal requirements and industry best**

practices is a must. PRMP's team is comprised of resources who have strong leadership ability and a desire to learn federal requirements and industry best practices. BerryDunn's business lead and supporting SMEs are the partner PRMP has been looking for, and our approach to service delivery allows PRMP to stretch their understanding and grow in their knowledge of industry best practices. Additional detail on this can be found within Section F.3 of this response.

- **PRMP needs a vendor who is going to provide clear and concise communications supported by proven expertise and tailored to PRMP's needs**. BerryDunn understands PRMP's preference for succinct reports supported by industry-backed and objective findings. BerryDunn brings team members who have that ability to provide objective findings supported by their deep expertise in a succinct manner.

- **Communication may be needed in both English and Spanish:** BerryDunn has been and will continue to be prepared to support PRMP in those instances where Spanish or English is needed. Whether it's a deliverable, artifact, or meeting requiring English or Spanish support BerryDunn has bilingual resources embedded in each team ready to support PRMP's needs.

- **Timely communication helps promote project success.** As with any project, being proactive in communicating project needs, activities, and/or timelines helps to ensure project success. BerryDunn's experience maintaining active and timely communications with PRMP on RFP development schedules are one of the many examples of our ability to provide communications.

- **The communication vehicle and the audience matter.** In a world where we must move as expeditiously as possible, it can be challenging to recall every particular project detail. PRMP needs an EOMC vendor who knows when communications should be documented via email, via notes, and/or in other project documentation and shared with appropriate team members. Doing so is paramount to memorialize project milestones and successes so that they can be called upon as future needs arise.

The following identifies an initial list of communication norms to aide in supporting the above requirements:

- BerryDunn will strive to have team members on-site each week in support of healthy in-person communications

- When not on-site, BerryDunn team members will join meetings via Zoom or MS Teams and their video will be on

- Project action items, issues, risks, and decisions will be shared with PRMP subsequent to meetings via notes, emails, and/or status reports

- In alignment with the RFP SLAs, BerryDunn will acknowledge PRMP inquiries within 24 hours of receipt

Additional communication norms will be documented in project kickoff materials and/or supporting service area artifacts.

BerryDunn primarily uses MS Teams, Zoom, SharePoint, and/or email to support project communications. If sensitive and/or confidential information needs to be shared with PRMP, BerryDunn will use the approach detailed in Section F.6 to support management of this information.

To identify stakeholders during the communication planning process, BerryDunn typically uses stakeholder brainstorming, stakeholder analysis, historical data, and stakeholder interviews and surveys to help identify the stakeholders who may need to be engaged in support service area communications.

Typically, at a start of a project, BerryDunn builds an initial stakeholder register and reviews it with project sponsors. That register contains information about stakeholders such as their role, expectations, communication preferences, and potential risks and opportunities associated with their involvement. Given BerryDunn's long-standing history with PRMP and understanding of the PRMP and ASES teams, BerryDunn will leverage its existing stakeholder register and continue to maintain it on an annual basis.

The stakeholder register is used by project teams as an input into their service area's planning and initiation activities, and throughout each service area's execution, monitoring, and control phases. Additional analysis tools the team may use throughout the service areas term are power/interest grids and/or salience models. PRMP can trust that BerryDunn will leverage these industry based tools and approaches to help ensure the stakeholder engagement.

Lastly, Table 34 details the PRMP team members BerryDunn currently understands as the individuals leading each of the service areas identified within this RFP. This list was initially assigned by the Executive Medicaid Director and BerryDunn has maintained its updates through conversations with the PRMP leadership team. BerryDunn will continue to work with PRMP to maintain the below assignments, and will leverage the below assignments to aide in execution of project communications:

Table 34: PRMP Lead for Service Areas

Service Area	PRMP Lead
Procurement	Jorge Sanchez
APD	Marcia Berrios
MITA SS-A	Rafael Graulau
Subprojects	Dinorah Collazo Marcia Berrios
IMES	Marcia Berrios
OBC	Francheska Aponte Carlos Carrasquillo Samuel Velez Rafael Graulau
PERM	Louis Feliciano
Spenddown Implementation Support	Dinorah Collazo Luz Cruz
SPA	Dinorah Collazo Luz Cruz
MFP Implementation Planning Support	Nicole Mercado
Policy Updates Support	Dinorah Collazo Luz Cruz

Service Area	PRMP Lead
Security Privacy and Assessment	Rafael Graulau
Other EOMC Support	Dinorah Collazo Marcia Berrios
OCM	Debora Santiago Carlos Carrasquillo
HIE	Carlos Carrasquillo
EDW	Carlos Carrasquillo
VCM	Jorge Sanchez Marcia Berrios Rafael Graulau

F.5.d.2 Manage and Monitor Communications

At a minimum, BerryDunn will use the following to help manage communications in support of **Section F.3** of this proposal:

- Scheduled communications (i.e., meetings)

- Ad hoc communications (i.e., calls)

- Issues, risks, decisions, and action item logs

- KnowledgeLink (i.e., BerryDunn's SharePoint site)

- Project documentation (i.e., project artifacts and deliverables)

Table 35 identifies scheduled communication vehicles BerryDunn may use to manage the work detailed within **Section F.3** of this proposal:

Table 35: BerryDunn Communication Vehicles

Scheduled Communications		
Method	**Description**	**Frequency**
Meeting	Members of the EOMC PPMT meet with the representative(s) from PRMP to provide an update on project progress and any key issues or risks.	Weekly
Meeting	The EOMC business lead will meet with the respective PRMP lead / counterpart to discuss project progress and any key risks, issues, and/or outstanding decisions as determined best by the PRMP and BerryDunn business leads.	Weekly or as needed
Meeting	The EOMC account manager and lead program manager will meet with PRMP leadership to discuss contract status, risks, issues, and project updates.	Biweekly
Meeting	The EOMC PPMT will meet to discuss and address engagement risks, issues, action items, and decisions as well as engagement-wide communications that may be necessary to enhance service delivery.	Biweekly

Scheduled Communications		
Method	**Description**	**Frequency**
Meeting	The EOMC PPMT will meet with the business leads to address risks, issues, and project integration opportunities.	Biweekly
Meeting	The EOMC program managers will meet one on one with business leads to discuss service area status, roadblocks, and the week ahead.	Twice a Week
Status Report	The EOMC team will produce a Monthly EOMC Status Report that outlines project accomplishment and progress toward MES objectives, and any risks or issues related to EOMC services.	Monthly
Status Report	The PgMO Service Area team will produce the Monthly CMS and PRMP MES Status Report and will meet the CMS reporting standards as outlined in Section F.3.f. This report will be delivered to the PRMP program manager prior to the CMS report deadline.	Monthly
Status Report	The PgMO Service Area team will produce the Monthly PRMP MES Executive Briefing as outlined in Section F.3.f. This report will be delivered to the PRMP program manager at a mutually agreed time.	Monthly
Project Log	Project log management, such as risks, issues, changes, and decisions, will be tracked in the BerryDunn KnowledgeLink, a SharePoint-based repository. These items will include updates from the assigned owner that will convey information to the team, thereby serving as a communication tool. The EOMC team will share information from these project logs with PRMP, as needed.	Biweekly
Ad Hoc	Ad hoc communications may include phone calls, emails, and informal in-person discussions.	As Needed

In support of our approach toward monitoring project communications, BerryDunn will periodically assess the effectiveness of our communication efforts. We will do this through mechanisms such as:

- Reoccurring check-in topics requesting feedback on communication styles and approaches

- Surveys

- Independent reviews of project issues and risks

As the project progresses, being flexible in adapting communication plans to accommodate changing circumstances, stakeholder needs, and/or unexpected issues is critical toward any project's success. As BerryDunn identifies needs for changes in approaches for communications, we will update our project management plan and share with PRMP as necessary.

F.6 Approach to Security Requirements

Please describe in narrative form how your organization will meet the following Security requirements:

F.6.a Protection of Sensitive Data

a. Describe how you will ensure all staff, including subcontractors, will protect sensitive data.

BerryDunn is committed to working with PRMP to help ensure compliance with all relevant standards and policies. Our experience in developing and maintaining programs to safeguard sensitive and regulated data enables us to design our information security program (policies, standards, and procedures) based on industry and regulatory frameworks such as NIST, HIPAA, SOC2, and the Gramm–Leach–Bliley Act (GLBA).

We process data in accordance with some of the strictest data security standards set forth by HIPAA, California Consumer Privacy Act (CCPA), and California Privacy Rights Act (CPRA) and maintain client and internal data using rigorous security protocols. Our staff and subcontractors are required to read and agree to the firm's policies, and we provide ongoing training to help ensure their understanding and compliance.

The firm has implemented a technical safeguards policy that outlines the requirements for encrypting data both at rest and in transit. Data at rest is encrypted using a minimum of AES 256-bit, while data in transit is encrypted using TLS version 1.2 or higher. All BerryDunn endpoints and removable media are encrypted with full disk encryption utilizing Microsoft BitLocker. Additionally, all servers and services hosted on the on-premise hyperconverged infrastructure and Microsoft Azure are encrypted at the host level. Services that transmit sensitive information must be configured with TLS 1.2 encryption.

For remote access, the firm uses Microsoft's Always on Virtual Private Networking (AoVPN) and Citrix environment. Authentication for remote access requires user credentials and multifactor authentication, and the firm deploys certificates to managed endpoints to authenticate to sessions to internal resources.

BerryDunn uses Citrix ShareFile, a secure file and message transfer system, to send confidential messages and sensitive files over public networks. All data is encrypted in transit and at rest, and ShareFile delivery is certified. All files sent via ShareFile are securely purged from the system within 30 days of the initial transfer.

Nightly backups are performed to a disk system, and the backup data is then copied to tape. All tape backups are encrypted with 256-bit AES encryption and stored off-site in a secure, fireproof environment. BerryDunn keeps all monthly backups for one year, daily backups for 30 days, and weekly backups for 30 days. BerryDunn also maintains 30 days of daily backups on its disk-based system and tape backups.

The high availability infrastructure is in a server room with redundant cooling, a battery backup system, and a generator power backup. The hyper-converged infrastructure is located in Portland, ME, and the Manchester, NH office serves as a secondary site. The generator/power loss is tested twice a year. In the event of an outage that affects the availability of systems/ services, the Cybersecurity Incident Response Plan (CIRP) includes processes to prioritize systems and services based on criticality.

F.6.b   Data Confidentiality

b.   Describe how you will ensure data confidentiality.

BerryDunn has an information security program that includes several assessments to help ensure we have effective data confidentiality policies and procedures in place. We have an internal staff dedicated to data confidentiality, responsible for helping ensure our program evolves with industry best practice and compliance with regulations for sensitive data. Annually we undergo a HIPAA Security Risk Assessment and help ensure that we have the necessary physical, technical, and administrative controls in place.

BerryDunn also conducts an annual SOC2 audit to obtain an independent service auditor's report of our adherence to SOC2 controls. In addition, the firm undergoes an independent third-party annual assessment of our security program and controls, as compared against industry best practice and frameworks such as NIST, International Organization for Standardization (ISO), Center for Internet Security (CIS), and Critical Security Controls (CSC). Included in this third-party assessment is an independent internal vulnerability scan, as well as an external penetration test of all externally facing systems and services.

F.6.c   Staff Training to Understand and Observe Confidentiality

c.   Describe how you will train staff to ensure they understand and observe requirements related to confidentiality included in this RFP.

As a CPA and consulting firm, all our professional staff—including our consultants—are required to obtain at least 20 hours of continuing professional education every year. Each member of our consulting group typically exceeds this requirement by completing professional services educational programs each year. BerryDunn offers a thorough orientation process for new employees, which covers firm-wide and industry-specific training and information needed to prepare new hires to work effectively.

We regularly seek out areas of professional education and/or certifications that will meet the needs of our clients. Further, individuals designated as having specialized industry experience and expertise are encouraged to maintain their proficiency by joining appropriate professional associations and attending external professional education programs.

BerryDunn trains its staff on its information security program starting during orientation. All workforce members must complete required training on use of firm systems prior to access. This training covers the firm's policies, procedures, and safeguards around protecting the confidentiality of all sensitive and client data. In addition, workforce members are assigned annual HIPAA training, as well as quarterly security awareness trainings. The firm also uses "phishing tests" to help ensure safe email practices in line with best practices.

Additionally, for BerryDunn consultants and contractors assigned to this contract, additional training will be developed relating to confidentiality and operational guidelines specific to this contract. In accordance with PRMP's security requirements, trainings for the team will be conducted and acknowledged prior to the team member having access to systems and data related to this contract.

F.6.d   Security Breach Processes

d.   Describe your processes if a security breach were to occur (as it relates to this RFP).

BerryDunn has robust security measures in place to protect against security intrusions. The firm's Security Incident and Event Management (SIEM) system, in partnership with Secureworks, continuously monitors our network, firewalls, servers, and endpoints for potential security breaches. In the event of a security incident, BerryDunn has a CIRP aligned with the four phases of the NIST incident response life cycle. This plan includes internal and external notification procedures, and if a confirmed breach involving state data occurs, BerryDunn will notify Puerto Rico in accordance with the agreed-upon timeline in the client contract.

BerryDunn's CIRP team is well-prepared to respond to security incidents and has clearly defined roles and responsibilities. The firm conducts an annual tabletop exercise with a third-party vendor to simulate a cyber incident and assess the effectiveness of the plan. The exercise results in a report with feedback that BerryDunn uses to make ongoing improvements to the plan.

Additionally, the firm maintains an incident response retainer with Secureworks to help ensure quick access to a team of incident response consultants and engineers in the event of a major security incident.

BerryDunn

F.7   Approach to Transition Requirements

Please describe in narrative form how your organization will meet the following Transition requirements:

F.7.a   Transition Plan

a.   Describe the activities and methodology to be included in the Transition Plan.

As important as it is to supply experienced and knowledgeable staff to PRMP, we understand the need to help PRMP ensure continuity through transitions. These transitions may be additional experts to start work on the project, transitioning staff off the project, or even transitioning vendors. With a deliberate approach that understands our team members might be joining or departing a project midstream and by developing a transition plan, we intend to help ensure a smooth transition for onboarding or departing team members, as well as transitioning the project support to PRMP or other vendor staff.

We emphasize collaboration in all our project work, helping to ensure that key stakeholders remain engaged throughout the project life cycle. This collaborative approach, combined with the creation of deliverables and the use of tools (where possible) that can be employed to sustain progress, helps ensure that knowledge is effectively transferred between staff.

In accordance with the terms and conditions set forth in the RFP and resulting contract, if necessary, BerryDunn will prepare a Transition and Closeout Management Plan (Transition Plan). This Transition Plan will include topics such as:

- Key personnel and their responsibilities during transition activities

- Knowledge transfer activities for PRMP or a designated agent

- Detailed description of the transition process to facilitate the smooth transition of operations within timelines

- Turnover/closeout work breakdown structure; including dependencies on PRMP and other vendors

- Transfer of assets (i.e., software, licenses, subscriptions, branding, hardware, furniture, lockboxes) and security responsibilities (if applicable)

- Dependencies on resources (e.g., vendor staff, other vendors, technology, licenses, contracts) necessary to complete the transition activities

- Project communication associated with risk management and project status reporting during the transition

- Transition or closure of active correspondence, as applicable

- Job shadowing and training activities necessary for the transition

- Certificates of destruction of project assets and data, as necessary

- Delivery of project documentation in final as well as editable formats, including documents such as the Program Management Plan(s), master project schedule, risk and issues register, business / process design, business standard operational procedures

- Transfer of assets, as applicable

- Transition or closure of active correspondence

- Delivery of the project closeout report

Additional transition plan deliverables may include a statement of resources, a turnover results report, module and system software and files, and details on infrastructure used to support operations of this contract.

We will deliver a draft of the Transition Plan to PRMP for review, performing a walkthrough of the document. After PRMP's review is complete, we will incorporate feedback and submit the final draft of the document.

Unless otherwise stated in contract terms, BerryDunn will prepare the Transition Plan six months preceding contract termination or upon request.

BerryDunn's transition and closeout strategy will aim to establish a self-sufficient team to support PRMP projects and/or programs. Our EOMC team will accomplish this through the following activities:

- ***Planning*** for turnover and closeout

- ***Supporting*** PRMP with the turnover and closeout

- ***Monitoring*** the turnover and closeout

These are described in greater detail below.

- ***Planning***. Throughout the program, BerryDunn's EOMC team will emphasize to PRMP the importance of starting with the end in mind. This is a vital part of our engagement approach spanning from certification planning to turnover and closeout planning. As we begin undertaking the individual projects, we will include milestones and tasks for turnover and closeout planning purposes. We understand that initial milestones and tasks can change throughout the life of the project, and that is why our unique approach allows for structured flexibility. This structured flexibility allows us to consistently align with PRMP goals and outcomes throughout the life of the project.

  As a part of turnover and closeout activities, BerryDunn will provide current operational and systematic processing procedures, data, and documentation on a schedule as required at the beginning of the turnover and closeout phase.

  Keys to the successful planning for turnover and closeout will be:

  ➢ Identifying the level of staffing required by all involved organizations to successfully transition activities

  ➢ Determining an accurate and realistic timing of the turnover and time frame during which BerryDunn will continue to support PRMP after PRMP and/or PRMP-contracted suppliers assumes responsibility

  ➢ Developing a culture within the BerryDunn team beginning-during project initiation that underscores the eventual transition of our role to the PRMP or their designee

  Additional considerations for planning turnover and closeout activities include:

  ➢ Identifying transition team resources

- Quantifying the scope of work to be transitioned

- Identifying to whom the work will be transitioned (e.g., PRMP or another vendor)

- Defining training tools and required knowledge transfer

- Methodology for training and knowledge transfer

- Performing risk assessment

- Transitioning physical and logical property

- Planning administrative tasks (e.g., securing access, memorandum of understanding)

- Communicating about the turnover

BerryDunn will address these topics during planning to allow the transition team to begin work on executing transition activities.

- *Supporting.* We will begin supporting PRMP with the turnover phase by collaborating with PRMP identified resources who will be taking over EOMC responsibilities. Once PRMP identifies those resources, we will begin focusing on what is being transitioned—such as knowledge, processes, and/or documents. We will also begin communicating about the upcoming transition to help create awareness.

As we work with PRMP to define what will be transitioned, we will create a catalog of the items that need to be transitioned, be they standard processes or system documents. For each item, we will identify a method for transitioning this material, which can range from a simple hand-over of a document, to a walkthrough of the document, or a variety of training. In addition to our method, we will work with PRMP to identify the audience that will receive the information, the frequency (e.g., a one-time walkthrough or multiple trainings) and a high-level time frame for the knowledge sharing such as 30, 60, or 90 calendar days prior to turnover.

In addition to the knowledge that needs to be transitioned, we will catalog physical items that need to be transitioned. As with the transition of knowledge, the transition of physical items will include identifying the recipient and the timing. Physical items could range from printed documents and manuals to Puerto Rico access cards. Furthermore, BerryDunn will work with PRMP to help ensure successful transition of any tools under the contract to an approved location.

BerryDunn understands that PRMP desires a low-risk turnover that is transparent to the resources and enables an orderly, complete, and controlled transition of processing and services provided to clients, providers, and operational users of the solution to PRMP or the successor vendor to minimize any disruption.

- *Monitoring.* Once the transition occurs, BerryDunn will monitor turnover and closeout activities. To support a successful project closure, our project closure documents (including the Transition Plan) will help ensure that the following is planned for, documented, and/or transitioned to PRMP:

- Confirmation of achieving the overall project goals and objectives and justification for any modification to those goals and objectives

➢ A summary of all approved changes to the project

➢ Project issues and risks realized during the project with an ongoing impact to operations or an impact to the execution of subsequent project phases

➢ Lessons learned during execution of the project for which modifications should be made to the approach in subsequent projects

To support transition efforts, our project team will provide a walkthrough of the Transition Plan, review project procedures, and project repositories, and help ensure all project documents are successfully transitioned.

F.7.b   Staff Responsible for Transition

b.   Describe the staff responsible for the transition.

The account manager, lead program manager, and supporting PPMT members are primarily responsible for transition activities and are collectively known as the Transition Team. These individuals will work in conjunction with the business leads to develop and execute the Transition Plan.

PRMP, BerryDunn, and the future EOMC vendor will be critical members of the Transition Team. PRMP team members will focus on receiving and consuming documentation that BerryDunn develops and sends to PRMP. As planning for the turnover begins, we encourage PRMP to identify a turnover team lead who will work closely with the BerryDunn turnover team lead. This will be an important relationship to establish and may be one that has been developed over previous work performed throughout the life of the contract.

F.7.c   Maintaining the Documentation Repository During Transition

c.   Describe your approach to maintaining the Documentation Repository during Transition.

The BerryDunn MES EOMC team will continue to update the document repository through the contract end and the end of transition. We will archive project deliverables and artifacts during the life of the contract, helping ensure that deliverables and artifacts relating to the project are electronically filed in the designated area on the shared SharePoint site or other agreed-upon platform, and/or that they are emailed to PRMP and/or other approved individuals.

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Attachment G: Terms and Conditions Response

This section describes the Terms and Conditions of the RFP, the PRMPs expectations of vendors, and compliance with federal procedures.

G.1 Title Page
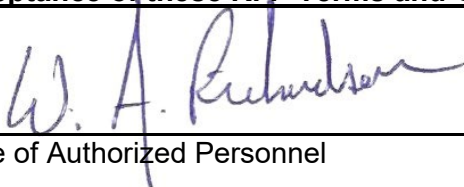
The vendor should review **Attachment G: Terms and Conditions Response** signing each provided signature block using <u>blue ink</u> in order to note the vendor's acknowledgment and intent of compliance. The vendor should identify any exceptions to the Terms and Conditions. If exceptions are not noted in **Attachment G: Terms and Conditions Response** of the RFP but raised during contract negotiations, PRMP reserves the right to cancel the negotiation if, at its sole discretion, it deems that to be in the best interests of PRMP.

G.2 RFP Terms and Conditions

RFP Terms and Conditions consist of provisions throughout this RFP. Moreover, these provisions encapsulate instructions, State and federal procedures, and PRMP's expectations of the vendor when submitting a proposal. The vendor should understand and strictly adhere to the RFP Terms and Conditions. Failure to follow any instructions within this RFP may, at PRMP's sole discretion, result in the disqualification of the vendor's proposal.

<u>Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of these RFP Terms and Conditions.</u>

William A. Richardson/   October 23, 2023
_____
Printed Name / Signature of Authorized Personnel   Date

G.3 Customary Terms and Conditions

The selected vendor will sign a contract with PRMP to provide the goods and services described in the vendor's response. The following documents shall be included in any contract(s) resulting from this RFP:

- **Appendix 1: Service-Level Agreements and Performance Standards**

- **Appendix 3: Proforma Contract Draft** *inclusive of HIPAA Business Associate Agreement*

Please provide a signature stipulating the vendor's acknowledgment, complete review, and acceptance of these documents.

William A. Richardson/ _(signature)_   October 23, 2023

Printed Name / Signature of Authorized Personnel   **Date**

If the vendor is NOT taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor needs to provide a binding signature stipulating its acceptance of these documents. If the vendor is taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor should write 'Taking Exceptions' on the line below and should follow the instructions for taking exceptions, as listed in Attachment G: Terms and Conditions Response, Section 6: Exceptions.

Taking Exceptions

Printed Name / Signature of Authorized Personnel   **Date**

G.4 Mandatory Requirements and Terms

The following items are Mandatory Terms and Documents. Please be advised, the vendor should provide its affirmative acceptance of these items in order to move forward with consideration under this RFP.
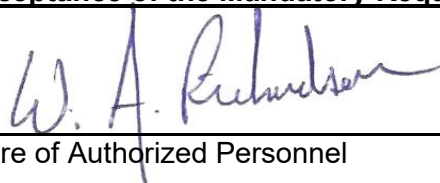
Attachment E: Mandatory Requirements

- Prior to the Contract resulting from this RFP is signed, the successful vendor must be registered with the **"Registro Único de Proveedores de Servicios Profesionales" (RUP)** from the Puerto Rico General Services Administration (ASG) and with the Puerto Rico Treasury Department (Hacienda) for the collection of sales and use tax (IVU) as a provider (if applicable) in the Internal Revenue Unified System (SURI). PRMP shall not award a contract, unless the vendor provides proof of such registration or provides documentation from the Puerto Rico Treasury Department that the Contractor is exempt from this registration requirement in the SURI system. The foregoing is a mandatory requirement of an award of a contract pursuant to this solicitation. For more information, please refer to the PR Treasury Department's web site http://www.hacienda.pr.gov

- Prior to the Contract resulting from this RFP is signed, the successful vendor must provide a Certificate of Insurance issued by an insurance company licensed or authorized to provide insurance in Puerto Rico. Each Certificate of Insurance shall indicate current insurance coverages meeting minimum requirements as specified by this RFP. A failure to provide a current, Certificate of Insurance will be considered a material breach and grounds for contract termination. A list of the Insurance policies that may be included in this Contract are provided in **Appendix 3: Proforma Contract Draft.**

- A performance bond may be required for this RFP.

- Evidence of good standing.

- **Appendix 1: Service-Level Agreements and Performance Standards**

- **Appendix 3: Proforma Contract Draft** inclusive of HIPAA Business Associate Agreement

Vendors that are not able to enter into a contract under these conditions should not submit a bid.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of the Mandatory Requirements and Terms stipulated in this section.

William A. Richardson/	October 23, 2023
Printed Name / Signature of Authorized Personnel	Date

G.5 Commercial Materials

The vendor should list any commercial and proprietary materials it will deliver that are easily copied, such as Commercial Software, and in which PRMP will have less than full ownership ("Commercial Materials"). Generally, these will be from third parties and readily available in the open market. The vendor need not list patented parts of equipment.

BerryDunn has identified within **Section F.1.g** of this response those commercial and proprietary materials to be delivered that are easily copied and in which PRMP will have less than full ownership.

G.6 Exceptions

The vendor should indicate exceptions to PRMP's Terms and Conditions in this RFP. Any exceptions should include an explanation for the vendor's inability to comply with such term or condition and, if applicable, alternative language the vendor would find acceptable. Rejection of PRMP's Terms and Conditions, in part or in whole, or without any explanation, may be cause for PRMP's rejection of a vendor's Proposal. If an exception concerning the Terms and Conditions is not noted in this response template, but raised during contract negotiations, PRMP reserves the right to cancel the negotiation, at its sole discretion, if it deems that to be in the best interests of PRMP.

The terms and conditions of a vendor's software license, maintenance support agreement, and SLA, if applicable, will be required for purposes of contract negotiations. Failure to provide the applicable vendor terms, if any, as part of the RFP response may result in rejection of the vendor's proposal.

Instructions: Identify and explain any exceptions to PRMP's terms and conditions using the tables provided below, adding tables, as needed. If no changes are listed, the vendor is indicating that no changes to the Terms and Conditions are proposed and that the vendor intends to accept them as written if the vendor's Proposal is selected. Mandatory Requirements and Terms noted in this RFP are non-negotiable.

- *The vendor may add additional tables, as appropriate.*
- *Do not submit vendor's Standard Terms and Contracting Provisions in lieu of stipulating exceptions below.*
- *Making revisions to PRMP statutes and regulations is prohibited.*
- *PRMP has no obligation to accept any exception(s).*

G.6.1   Exception #1

Table 36: Exception #1 – Assigned Staff

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response
10.3 Appendix 3:Proforma Contract Draft Third: Timetable and Work Site and Assigned Staff Page 65	BerryDunn has supported PRMP since 2019. In this time, BerryDunn has managed changes to staffing without regular notification to PRMP. BerryDunn respectfully requests to update the notification of staff roster changes from seven (7) calendar days to thirty-one (31) calendar days. This will allow reporting this information to PRMP to align with regular monthly reporting already planned for in the proposed approach.	Update the clause to read, "The SECOND PARTY must keep the Staff Roster updated and will deliver an updated copy to the FIRST PARTY within thirty-one (31) calendar days of each change."
NOTES/COMMENTS: <FOR PRMP USE ONLY>		

G.6.2   Exception #2

Table 37: Exception #2 – Negligence of Abandonment

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response
10.3 Appendix 3:Proforma Contract Draft Ninth: Negligence of Abandonment Page 67	BerryDunn has supported PRMP since 2019. Given the history of partnership, BerryDunn respectfully requests that this clause be updated to indicate that in the event of termination under this clause, the First Party will compensate the Second Party for finishing any pending matters.	Update the last sentence of this clause to read, "The SECOND PARTY, if requested by the FIRST PARTY, will finish all pending matters and jobs and will be compensated by the SECOND PARTY for such services at the previously agreed upon rate of compensation."
NOTES/COMMENTS: <FOR PRMP USE ONLY>		

G.6.3   Exception #3

Table 38: Exception #3 – Insurance Policies

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section of Vendor's Terms, If Any Provided As Part Of The RFP Response
10.3 Appendix 3:Proforma Contract Draft Twenty-First: Insurance Policies Page 75	BerryDunn has successfully supported PRMP since 2019, including providing profession liability coverage. Our insurance policy includes the client as a Certificate Holder. We understand this to be common practice in the insurance industry. We look forward to continuing to protect PRMP and PRDoH's interests by naming them as a Certificate Holder for our professional liability policy.	The policies must have the following endorsements: Naming the DEPARTMENT OF HEALTH of Puerto Rico, as a Certificate Holder.
NOTES/COMMENTS: <FOR PRMP USE ONLY>		

G.6.4 Exception #4

Table 39: Exception #4 – Certification Regarding Department of Labor and Human Resources Matters

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response
10.3 Appendix 3:Proforma Contract Draft Twenty-Eighth: Certification Regarding Department of Labor and Human Resources Matters Page 80	BerryDunn has supported PRMP since 2019. In this time, BerryDunn has not required chauffer's insurance based on the scope of services, nor does BerryDunn anticipate the EOMC scope as requiring chauffer's insurance. BerryDunn respectfully requests that PRMP allow the successful respondent to either mark chauffer's insurance as N/A or PRMP to strike the Chauffer's insurance requirement	Strike the requirement for Chauffer's Insurance.
NOTES/COMMENTS: <FOR PRMP USE ONLY>		

Attachment H: Requirements Traceability Matrix (RTM)

See the attached Microsoft Excel file titled _Attachment H: Requirements Traceability Matrix (RTM)_.

Please review the following instructions:

1. The vendor must note compliance with each requirement and each requirement's associated measure, metric, target setting, performance standard, and liquidated damage.

2. Vendor's Disposition values are outlined below:

   a. "**Will Meet":** The vendor agrees to meet the requirements and each requirement's associated measure, metric, target setting, performance standard, and liquidated damage. The vendor must respond with "Will Meet" for each requirement for the proposal to be considered responsive to the PRMP requirements and be further evaluated.

   b. "**Will Not Meet":** The vendor declines to meet the requirement and each requirement's associated measure, metric, target setting, performance standard, and liquidated damage. If a vendor responds with "Will Not Meet" to one or more requirements, the proposal will be considered non-responsive and may be disqualified per Attachment E: Mandatory Specifications.

   c. If a vendor responds with "Will Not Meet" to one or more requirement, the proposal will be considered non-responsive and may be disqualified per Attachment E: Mandatory Specifications.

3. All requirements must contain one of the values identified above. **Any requirement without a Vendor's Disposition response value will be considered "Will Not Meet."**

4. The vendor must provide the attachment, section, and page number(s) where their detailed narrative response for each requirement resides, providing the PRMP with a crosswalk and helping to ensure that each requirement specified in Attachment H is included in the vendor's response.

Reference BerryDunn's Attachment H: Requirements Traceability Matrix on the following pages.

Instructions
This attachment to RFP: 2023-PRMP-MES-EOMC-004 contains the requirements and service level agreements (SLAs) for the talent resourcing contract. This Requirements Traceability Matrix contains the following worksheets: A. Requirements B. SLAs This Microsoft Excel file must be completed and submitted as part of the vendor's proposal. The vendor should also provide a narrative description of how the requirements will be met in Attachment G: Response to Statement of Work. A description of the columns in worksheets A through B is provided below.

Field	Definition / Instructions
Req. #	The unique identification number assigned to each requirement or service level agreement (SLA) DO NOT EDIT THIS FIELD.
Requirement Description	The detailed description of the requirement or SLA. DO NOT EDIT THIS FIELD.
Requirement Met	Vendor response to whether the requirement will be met by the vendor. For worksheets A and B, indicate whether the requirement, as currently written, will be met by the vendor's proposal: Yes, No, or Clarification For each SLA requirement, indicate agreement: Yes or No
Vendor Proposed Response	If the Response Met is set to "No" the vendor must provide a response as to why the requirement cannot be met, as currently written.
Clarifying Comments*	If the Response Met is set to "Clarification", the vendor must provide clarifying comments.
Proposed Liquidated Damages Amount**	For each SLA, provide a recommended Liquidated Damages amount per measure for noncompliance.

* Only applicable to worksheets A through B

REQ #	Requirements Description	Will meet	Vendor Response	
			Vendor Proposed Response	Clarifying Comments
1	The EOMC vendor will ensure PRMP regulatory compliance.	Yes	BerryDunn will ensure PRMP regulatory compliance as described in Attachment F, Sections F.3.a - F.3.o.	
2	The EOMC vendor will improve operational efficiency.	Yes	BerryDunn will improve operational efficiency as described in Attachment F in Sections F.3.a - F.3.o., F.4, and F.5.	
3	The EOMC vendor will develop risk assessment methodology, templates and guidelines.	Yes	BerryDunn will develop risk assessment methodology, templates and guidelines as described in Attachment F, Sections F.3.a - F.3.o. and F.5.d.	
4	The EOMC vendor will identify applicable regulations and requirements.	Yes	BerryDunn will identify applicable regulations and requirements as described in Attachment F, Sections F.3.a - F.3.o.	
5	The EOMC vendor will comply with the timelines that PRMP will establish.	Yes	Upon discussion and mutual agreement, BerryDunn will comply with the timelines that PRMP will establish as described in Attachment F.	
6	The EOMC services include strategic planning and procurement, certification and compliance, program and policy management, organizational integration, security subject matter expertise and security and privacy assessments, implementation support and development support for Advanced Planning Document and MITA SS-A Annual updates.	Yes	BerryDunn services will include will include strategic planning and procurement, certification and compliance, program and policy management, organizational integration, security subject matter expertise and security and privacy assessments, implementation support and development support for Advanced Planning Document and MITA SS-A Annual updates as described in Attachment F, Sections F.3.a - F.3.o.	
7	The EOMC vendor will be required to work with PRDoH and CMS to ensure compliance with CMS standards.	Yes	BerryDunn will work with PRDoH and CMS to ensure compliance with CMS standards as described in Attachment F, Sections F.3.a - F.3.o.	
8	The EOMC vendor must use their knowledge and expertise to lead PRDoH in the development of the Center of Medicaid and Medicare System (CMS) requirements.	Yes	BerryDunn will use our knowledge and expertise to lead PRDoH in complying with the Center of Medicaid and Medicare System (CMS) requirements as described in Attachment F, Sections F.3.a - F.3.o.	
9	The EOMC vendor must have expertise of Puerto Rico Enterprise Medicare System (PRMES).	Yes	BerryDunn has expertise of PRMES as described in Attachment F, Sections F.2.a and F.3.a - F.3.o.	
10	The EOMC vendor must have expertise of Puerto Rico Medicaid Management Information System (PRMMIS).	Yes	BerryDunn has expertise of PRMMIS as described in Attachment F, Sections F.2.b and F.3.a - F.3.o.	
11	The EOMC vendor must have expertise of Provider Enrollment Portal (PEP).	Yes	BerryDunn has expertise of PEP as described in Attachment F, Sections F.2.c and F.3.a - F.3.o.	
12	The EOMC vendor must have expertise of Eligibility and Enrollment (E&E): i.System known as Medicaid Information Technology Initiative, (MEDITI3G)	Yes	BerryDunn has expertise of E&E and MEDITI3G as described in Attachment F, Sections F.2.d and F.3.a - F.3.o.	
13	The EOMC vendor must have expertise of The Commonwealth's Health Information Exchange (HIE).	Yes	BerryDunn has expertise of The Commonwealth's HIE as described in Attachment F, Sections F.2.e and F.3.a - F.3.o.	
14	The EOMC vendor must have expertise of Procurement.	Yes	BerryDunn has expertise of procurement as described in Attachment F, Sections F.2.f and F.3.a - F.3.o.	
15	The EOMC vendor must have expertise of Program Integrity Unit (PIU).	Yes	BerryDunn has expertise of PIU as described in Attachment F, Sections F.2.g and F.3.a - F.3.o.	
16	The EOMC vendor must have expertise of Money Follows the Person (MFP).	Yes	BerryDunn has expertise of MFP as described in Attachment F, Sections F.2.h and F.3.a - F.3.o.	
17	The EOMC vendor must have expertise of Centralized provider enrollment and credentialing (CPEC).	Yes	BerryDunn has expertise of CPEC as described in Attachment F, Sections F.2.i and F.3.a - F.3.o.	
18	The EOMC vendor must have expertise of the EOMC service areas.	Yes	BerryDunn has expertise of the EOMC service areas as described in Attachment F, Sections F.2 and F.3.a - F.3.o.	
19	The EOMC vendor must have at least three (3) years of experience with Medicaid Enterprise Systems (MES) and Federal (CMS) & State Governmental requirements and documentation.	Yes	BerryDunn has at least three (3) years of experience with Medicaid Enterprise Systems (MES) and Federal (CMS) & State Governmental requirements and documentation as described in Attachment C, Sections C.2 and C.5.	
20	All the EOMC Vendor Key staff must have at least five (5) years of experience working with Medicaid and CMS.	Clarification	PRMP clarified within the Amendment 7 RFP Requirement #4 within Section 2.1, "All the Vendor Key staff must have experience working with Medicaid and CMS. Leads Key must have at least five (5) years of experience." BerryDunn Key Staff have experience working with Medicaid and CMS. Leads Key have at least five (5) years of experience.	
21	The EOMC vendor must have all the liability policies.	Yes	BerryDunn has all liability policies and will share these with PRMP upon request.	
22	The EOMC vendor that provide services to PRMP that may represent a conflict of interest may be disqualified. Vendors that provide services that involve overseeing other services may be disqualified.	Yes	BerryDunn has a current Health Information Technology (HIT) and EOMC Support Services statement of work agreement with the Puerto Rico Department of Health. We do not see this RFP as representing a conflict of interest with those existing services and will transition our existing services either to this new contract or a new vendor when the resulting contract is executed.	

23	The EOMC vendor's that provide services to PRMP that may represent a conflict of interest may be disqualified. Vendors that provide services that involve overseeing other services may be disqualified.	Yes	BerryDunn has a current Health Information Technology (HIT) and EOMC Support Services statement of work agreement with the Puerto Rico Department of Health. We do not see this RFP as representing a conflict of interest with those existing services and will transition our existing services either to this new contract or a new vendor when the resulting contract is executed.	
24	ALL INCLUSIVE SERVICES – Additional work necessary to meet the terms of service under the above scope of work should be identified and included in Proposals.	Yes	BerryDunn has identified and included any additional work necessary to meet the terms of service under the scope of work as described in Attachment F, Sections F.3.a - F.3.o.	

SLA	SLA Description	Will meet	Vendor Proposed Response	Proposed Liquidated Damages for Non-Compliance
				Vendor Response
1	Deliverables: The vendor will comply with the dates for completion of these deliverables will be used as checkpoints for performance monitoring and vendor payments. The vendor's status reports will provide information on progress toward meeting these deliverable dates.	Clarification	As stated in Section 8.7 of the RFP, upon discussion and mutual agreement, BerryDunn will comply with the dates for completion of deliverables. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs. As detailed in Appendix 1 of the RFP, BerryDunn is comfortable agreeing to the following: "Due dates for acceptance of deliverables will be agreed upon by PRMP and the vendor and finalized in the vendor's deliverable tracker once formally approved by PRMP. The dates for completion of these deliverables will be used as checkpoints for performance monitoring and vendor payments. These dates will be regularly managed and PRMP approvals of date changes will be documented in the deliverable tracker as the deliverable date. The vendor's status reports will provide information on progress toward meeting these deliverable dates."	PRMP shall assess up to $100 per calendar day per deliverable from the agreed-upon deliverable acceptance date until the date each deliverable receives acceptance from PRMP.
2	Turnover: The vendor will comply with the Turnover and Management Plan.	Clarification	BerryDunn will prepare and submit a Turnover and [Closeout] Management Plan, and will comply with said Turnover and [Closeout] Management Plan. BerryDunn proposes the language for SLA #2 be modified to align with language within Attachment F: Response to Statement of Work and Section F.7. of our response. Below is the proposed language: "The Transition Plan deliverable defines the vendor's responsibilities related to turnover. Turnover will not be considered complete until the deliverable is accepted by PRMP." Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $500 per calendar day for each day after the due date that an acceptable EOMC Transition Plan is not submitted. PRMP shall assess up to $500 per calendar day for each day after 30 calendar days from the date of the turnover of operations that the Turnover Results Report is not submitted.
3	Turnover documentation: The vendor must provide to PRMP or its designee, within seven (7) business days of notice of termination the following information: •Copies of all subcontracts and third-party contracts executed in connection with the services included in this contract. •A list of services provided by subcontractors, including the names and contact information for the subcontractors. •Other documentation as defined by PRMP.	Clarification	BerryDunn will prepare and submit a Turnover and [Closeout] Management Plan, and will comply with said Turnover and [Closeout] Management Plan. BerryDunn proposes the language for SLA #2 be modified to align with language within Attachment F: Response to Statement of Work and Section F.7. of our response. Below is the proposed language: "Turnover documentation: The vendor must provide to PRMP or its designee, within seven (7) business days of notice of termination the following information: •Copies of all subcontracts and third-party contracts executed in connection with the services included in this contract. •A list of services provided by subcontractors, including the names and contact information for the subcontractors." Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $500 for each calendar day beyond the seven (7) business days that all required materials are not delivered by the vendor.
4	Email Triage and Acknowledgment: The vendor must triage all inquiries received from PRMP-approved email addresses. All emails received must be acknowledged within twenty-four (24) hours of receipt and resolved within three (3) business days unless otherwise approved by PRMP. The vendor must forward to the designated PRMP staff within one (1) calendar day those inquiries that are either: 1.Determined to be outside the response scope for the vendor. 2.Should be handled by PRMP staff. Compliance and Calculation: •Acknowledge all emails received within twenty-four (24) hours and resolve all emails within three (3) business days. •Forward to PRMP staff within one (1) calendar day emails that are determined to be outside of the vendor's response scope.	Clarification	As stated in Section 8.7 of the RFP, upon discussion and mutual agreement, BerryDunn will comply with email triage and acknowledgement requirements. BerryDunn proposes the following changes to this SLA: "The vendor must triage all inquiries received from PRMP-approved email addresses. All emails received must be acknowledged within twenty-four (24) hours of receipt. Compliance and Calculation: • Acknowledge all emails received within twenty-four (24) hours and resolve all emails within three (3) business days. • Forward to PRMP staff within one (1) calendar day emails that are determined to be outside of the vendor's response scope." Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	$100 per occurrence of an email not being acknowledged within twenty-four (24) hours. $100 per occurrence of any emails forwarded to outside the response scope of the vendor within one (1) calendar day.
5	Key Staff: During the entire duration of the contract, key staff commitments made by the vendor must not be changed without thirty (30) days prior written notice to PRMP unless due to legally required leave of absence, sickness, death, resignation, or mutually agreed-upon termination of employment of any named individual.	Yes	BerryDunn will comply with key staff commitments as outlined by PRMP. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	Up to a maximum of $3,000 per occurrence shall be assessed for each key staff person proposed who is changed without proper notice and approved by PRMP for reasons other than legally required leave of absence, sickness, death, or termination of employment.
6	Key Staff Replacement: The vendor will replace key staff in a timely fashion. Replacement of key staff will take place within thirty (30) calendar days of removal unless a longer period is approved by PRMP's authorized representative.	Yes	BerryDunn will comply with key staff replacements as outlined by PRMP. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $200 per business day for each business day after the initial thirty (30) calendar days allowed in which an acceptable replacement for that key staff position is not provided.
7	Meeting Agendas: The vendor will prepare agendas and distribute each agenda and any documents to be addressed at the meeting at least one (1) Business Days before the meeting, unless waived by PRMP.	Yes	BerryDunn will comply with meeting agendas as outlined by PRMP. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $200 per calendar day for each day an acceptable meeting agenda is not timely received.

8	Meeting Minutes: The vendor will publish meeting minutes it attends no later than two (2) Business Days after the meeting, unless waived by PRMP.	Clarification	If necessary, BerryDunn will comply with meeting minutes as outlined by PRMP. Historically, PRMP has not wanted BerryDunn to include someone to take meeting minutes in support of discussions. If meeting minutes are truly being requested, BerryDunn will work with PRMP to uphold this SLA. Otherwise, we would like to propose removing this SLA from this list. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $200 per calendar day for each day acceptable meeting minutes are not timely received.
9	Monthly Status Reports: The vendor must provide monthly reports identifying the current status of the EOMC activities, including any issues.	Yes	BerryDunn will provide monthly status reports identifying the current status of EOMC activities, including any issues. Please see Attachment F, Section F.5.b describing how BerryDunn plans to monitor and report on SLAs.	PRMP shall assess up to $200 per calendar day for each day an acceptable monthly report is not timely received. If the report is received on time but the information reported is inaccurate or incomplete, PRMP shall assess up to $200 per day until an acceptable report is received.

Appendices

BerryDunn

Account Manager / Policy Program Principal

Bill Richardson, MHA, ITIL (F), PMP®, Prosci® CCP
Account Manager and Policy Program Principal

Years of Applicable Experience: 22
Years of Relevant Experience Supporting PRDoH & PRMP: 4
Education and Certifications

Master of Healthcare Administration, University of Minnesota, School of Public Health

BS, Business, University of Minnesota, Carlson School of Management (Major: Management Information Systems, Minor: Political Science)

ITIL – Foundation Certified in IT Service Management

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

Bill is a principal in BerryDunn's Medicaid Practice Group with over 20 years of experience providing program and project management for Medicaid programs, policy, and enterprise systems projects. His experience includes both technical experience as a programmer as well as business and policy experience, including managing eligibility policy projects, Medicaid waivers, and State Plan Amendments.

Key Qualifications

- ❖ Over 20 years of program and project management experience, including technical, systems, and policy programs in over 10 states, including OH, MO, NM, HI, WV, NH, ND, NC, MS, GA, and MA
- ❖ Four years of experience in Puerto Rico, supporting PRDoH and PRMP
- ❖ Certified Project Management Professional®
- ❖ Over eight years of account management experience
- ❖ Bachelor of Science degree in Business and a Master of Healthcare Administration degree
- ❖ Over 10 years of Medicaid program and policy experience
- ❖ Medicaid experience in over 10 states
- ❖ Prosci® Certified Change Practitioner

Relevant Experience

BerryDunn (04/2011 to present)

Principal – Medicaid Practice Group (MPG) (07/2018 to present)
As a principal, Bill manages the strategy and execution of a portfolio of engagements. He leverages his Medicaid experience to guide and develop the team to meet client needs. His work includes helping teams create solutions tailored to the individual client that leverage industry best practice and evidence-based decisions. Bill helps ensure BerryDunn's teams consistently deliver quality results and satisfied clients. In addition, in the principal role, Bill combines his experiences to support BerryDunn initiatives such as BerryDunn's healthcare community of practice, innovation council, visioning process, and culture team. In turn, he applies this experience to support client organizations.

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (07/2019 to present)*.

Bill serves as the contract manager and engagement principal in BerryDunn's partnership with PRMP as they transform their Medicaid Enterprise. BerryDunn's EOMC services span from Medicaid policy and program transformation to program management across Puerto Rico's Medicaid Enterprise. BerryDunn has helped Puerto Rico complete strategic planning for their Medicaid Enterprise System roadmap, improve the management of their contracts and advanced planned documents (APDs), complete certification of multiple modules such as their IES, and transition aspects of operations from system vendor staff to the PRMP staff. In addition to Bill's contract management focus, he focuses his content knowledge on supporting the Medicaid program and policy. Some example projects include:

✓ *State Plan Amendments and Compliance.*
BerryDunn supports Puerto Rico in maintaining its state plan by reviewing State Plan Amendment (SPA) needs, reviewing related regulatory and sub-regulatory guidance, drafting SPAs along with public notice, and submitting SPAs. BerryDunn's work includes collaborating with the Administración de Seguros de Salud (ASES) to help ensure that MCO contracts and the State Plan are in alignment. Further, BerryDunn works with PRMP to bring the State Plan up to date, including navigating the difference in funding and regulatory compliance for a territory as compared to states.

✓ *Money Follows the Person (MFP) Grant Application and Assessment.*
Puerto Rico sought to leverage the MFP grant to assess opportunities for expanding long-term services and supports (LTSS) services in Puerto Rico. BerryDunn supported Puerto Rico's successful grant application and follow-on assessment work to support the awarded grant. BerryDunn worked with both Puerto Rico and CMS to navigate the successful grant application despite Puerto Rico not covering institutional long-term care services.

✓ *Long-Term Services and Supports Financial Analyses.*
As Puerto Rico sought to secure funding through Congressional action, Bill and the BerryDunn team created financial estimates for funding needs for Puerto Rico to support expanding Medicaid services to cover LTSS services in Puerto Rico.

Minnesota Department of Human Services (DHS) – *Program Analysis of Implementation of a PACE Program (10/2023 to present)*.

Bill currently serves as the contract manager and project principal for this engagement. BerryDunn is helping DHS analyze options for the implementation of a PACE program. In this role, Bill helps set the iterative project approach, helps ensure the team has the resources and knowledge necessary to complete the work, and reviews project deliverables for both content and quality.

Ohio Department of Medicaid (ODM) – *Ohio Medicaid Enterprise System (OMES) IV&V Services (12/2016 to present)*.

Bill currently serves as the contract manager and project principal for the OMES IV&V engagement. BerryDunn is helping ODM ensure a modular approach and implementation along with governance that will work for Ohioans and support ODM's modular certification process. BerryDunn works to support the interest of both CMS and ODM in successfully completing program goals.

Ohio Department of Administrative Services (DAS) – *Ohio Benefits IV&V Services (04/2021 to 07/2023)*.

Bill served as the project principal and contract manager for the Ohio Benefits IV&V engagement. Through this work, BerryDunn supported DAS in addressing specific requirements of CMS during the operations phase of the Ohio Benefits program. DAS successfully transitioned away from IV&V in July 2023.

Missouri Department of Social Services (DSS)

✓ *Missouri Medicaid Enterprise (MME) PMO Engagement (11/2017 to 07/2023)*.
Bill served as the project principal and contract manager for the MME PMO project spanning multiple Missouri DSS divisions. Key activities include partnering with the MME to support the implementation of a program integrity solution along with a business intelligence (BI) and enterprise data warehouse (EDW) solution along with supporting certification.

✓ *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2013 to 07/2023)*.
Bill served as the project principal and contract manager for the MEDES IV&V engagement. As part of this project, BerryDunn is serving as an independent partner as Missouri implements a new integrated eligibility system. This work has included an initial implementation, transition to a new systems vendor, and transition to a third vendor for maintenance and operations. BerryDunn is providing proactive risk and issue identification and

management.

Bill has worked on additional projects with Missouri, including serving as project principal for Missouri's Electronic Visit Verification (EVV) procurement assistance project where BerryDunn helped Missouri's Medicaid agency develop an EVV Request for Proposal (RFP), along with the Missouri Medicaid IT governance assessment that seeks to help Missouri determine a governance model that will help the State transform their Medicaid Enterprise.

New Mexico Human Services Division – *Health and Human Services (HHS) 2020 Project Support (08/2016 to 06/2018).*

BerryDunn provided support to the HHS 2020 project, New Mexico's modular MMIS replacement project. As the engagement manager, Bill brought his MMIS experience in support of project management and system architecture to BerryDunn's team.

Hawai'i Department of Human Services Med-QUEST Division (MQD) – *Organizational and Business Process Redesign (07/2017 to 12/2017).*

Bill served in the role of program director for the eligibility business process redesign effort for the customer-facing sections of Hawai'i's MQD. Bill oversaw the work performed by BerryDunn's team, reviewing and approving all deliverables, being involved in key meetings with MQD and State leadership, and helping ensure the full commitment of BerryDunn to the engagement. Phase Two of the project included a report of findings, including recommendations for an organizational transformation of their eligibility offices and call centers.

West Virginia Children's Health Insurance Program (WVCHIP) – *Assessment of ACA Compliance and Transition Project Management Support (10/2013 to 08/2015).*

Bill served as engagement manager overseeing the BerryDunn team evaluating needs associated with WVCHIP to help bring it into compliance with ACA requirements. This project included transitioning WVCHIP from its previous Third-Party Administrator (TPA) to an MMIS.

West Virginia Department of Health and Human Resources (DHHR) – *Various Projects (04/2011 to 06/2015).*

The following are representative projects Bill worked on or led for DHHR:

- ✓ *ICD-10 Transition Planning, Implementation, and Policy Remediation (03/2013 to 06/2015).*
- ✓ *Data Warehouse / Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014).*
- ✓ *Eligibility and Enrollment Project Support Services (04/2013 to 04/2014).*
- ✓ *PPACA Planning, Analysis, and Implementation Support (04/2011 to 12/2013).*

BerryDunn

Project Management Institute.

THIS IS TO CERTIFY THAT

William A Richardson

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Jennifer Tharp | Chair, Board of Directors

Pierre Le Manh | President & CEO

PMP® Number: 1420111   PMP® Original Grant Date: 24 June 2011   PMP® Expiration Date: 24 June 2026

BerryDunn

Zach Rioux, PMP®, Prosci® CCP, MCMP-II
Lead Program Manager and Engagement Principal

Years of Applicable Experience: 10

Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

BS, Political Science and Psychology, University of New England

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

MLC Certified Medicaid Professional (MCMP-II)

Zach is an experienced principal and Information Technology (IT) professional with a proven record leading successful portfolios, programs, and projects for Health and Human Service (HHS) agencies. As a principal within BerryDunn's Medicaid Practice Group, Zach has managed Medicaid Enterprise System (MES) implementation and certification efforts, facilitated multiple HHS agency strategic planning and procurement efforts, and directed portfolios of work focused on strategic planning and procurement, program management, governance, certification and compliance, and policy related initiatives. Whether Zach's been focused on managing an effort to help the PRMP achieve their first ever MMIS CMS certification or managing a portfolio of over 18 initiatives for West Virginia Department of Health and Human Resources, he brings thorough knowledge of portfolio, program, and project management, state IT procurements, CMS certification, finance, and health IT system implementations. Zach's ability to bring together, manage, and partner with large, cross-functional teams makes him an integral resource to any Medicaid agency looking to improve its health IT enterprise.

Key Qualifications

❖ Certified Project Management Professional®; Prosci® Certified Change Practitioner; MLC Certified Medicaid Professional

❖ Over seven years' experience with portfolio, program, and project management within Medicaid agencies and proven relationships with CMS and vendor community

❖ Over six years' experience in areas such as CMS certification, enterprise governance, strategic planning and procurement, and Medicaid finance

❖ Over four years of experience in Puerto Rico, supporting PRDoH and PRMP

❖ Over seven years' comprehensive portfolio, program, and project management experience

❖ Experience managing and/or collaborating with teams to manage portfolios containing over 18 system implementation, certification, strategic planning, governance, and/or health policy related initiatives with budgets as large as $15.7 million and teams as large as 34 full-time resources

❖ Extensive Medicaid Enterprise Certification Toolkit (MECT), Outcome-Based Certification (OBC), and Streamlined Modular Certification (SMC) experience from assisting SMAs with four successful MMIS and Eligibility and Enrollment (E&E) CMS OBC and SMC efforts (including PRMP's first two certification efforts)

❖ Proven success in leading and/or providing oversight for the development, evaluation, and award of more than seven large-scale and complex HHS IT solutions procurements – including over five for PRMP

Relevant Experience

BerryDunn (05/2013 to present)

Puerto Rico Department of Health and Human Services (DHHS) (06/2019 to present)

✓ Zach is currently serving as a portfolio and engagement manager responsible for BerryDunn's services in Puerto Rico. Since 2019, Zach has supported PRMP in overseeing, managing, and/or supporting collaboration across over 16 contracts and 25 different service areas, and at times he was responsible for over 34 full time resources. Of particular focus for Zach throughout this time with PRMP was his role overseeing, managing, or supporting strategic planning, procurement, certification, compliance, program management, and policy related initiatives for PRMP. In this role, Zach has managed annual budgets ranging in size from $432,000 to as high as $9.6M.

✓ As a portfolio manager in Puerto Rico, Zach is directly responsible for teams and the delivery of services supporting the strategic planning, procurement, certification, compliance, and program management service areas; he is responsible for helping ensure collaboration with the policy management area of the engagement.

✓ As an engagement manager in Puerto Rico, Zach is chiefly responsible for client management and helps ensure client needs are fulfilled in as satisfactory a manner as possible. Zach is also responsible for helping ensure the engagement's two contracts are delivered in as coordinated a manner as possible.

✓ Since 2019, Zach has been in a leadership role supporting teams in accomplishments such as PRMP's first MMIS and E&E certifications; establishment of a competitive procurement process for PRMP's Medicaid Enterprise; several enterprise-wide governance related processes and plans; preparations relating to PRMP's first Payment Error Rate Measurement cycle; submission of annual Advance Planning Documents, development and submission of annual MITA-SSA documentation; and development of PRMP's first MES roadmap.

✓ Zach has become best known in Puerto Rico as a leader who brings teams together, helps navigate the unknown, helps enhance PRMP's compliance with federal requirements, helps further PRMP's relationships with CMS, and increases PRMP's presence at national conferences and within industry work groups.

West Virginia Department of Health and Human Resources (DHHR) and the Bureau for Medical Services (BMS) (05/2013 to 12/2019)

✓ Zach served as a portfolio, program, and project manager for the West Virginia DHHR and BMS Project Management Organization (PMO) from May of 2013 through December of 2019. In his portfolio, program, and project management roles, Zach collaborated with two portfolio managers, six program managers, 12 project managers, and over 80 resources to assist the West Virginia DHHR in completing system implementation, certification, strategic planning, procurement, health policy, data governance, and governance related initiatives. In this role, Zach helped portfolio, program, and project managers to manage budgets ranging in size of approximately $500,000 to over $15.7M and teams as large as 28 resources.

✓ As a portfolio, program, and project manager in West Virginia, Zach collaborated directly with client and federal partners to help achieve project objectives and to help ensure BerryDunn's services were delivered in accordance with contracted terms. Example projects of focus included but were not limited to: Provider Enrollment, Data Visioning and Warehouse Development and Procurement, Technical Information and Enterprise Project Management Services, MITA SS-A Maintenance and Annual Updates, Advance Planning Documents, Project Management, testing, certification support for an MMIS Implementation, procurement support for MES projects (i.e. E&E, AVS, and EDW), policy related support for access to care issues, PPACA Planning analysis, and implementation support.

✓ Major accomplishments during his time supporting West Virginia's DHHR and BMS included but were not limited to helping DHHR implement an MMIS on time with no change orders; successful management of MMIS testing phases (i.e. SIT, UAT, ORT, and parallel testing); development and publication of one of the first integrated beneficiary eligibility solution RFPs in the nation; streamlining of APDs; and establishment of the ePMO supporting WV DHHR.

✓ Zach is best known in West Virginia as the individual who brings teams together, is a tenacious executor and project manager, and is someone you call when you are not sure how to proceed.

New Jersey Division of Medical Assistance and Health Services – *MMIS Implementation and Certification Leverage and Reuse (04/2017 to 09/2017).*

Zach served as a subject matter expert to supply expertise in the areas of system integration testing, user acceptance testing, operational readiness testing, APD development, and deliverable review.

Vermont Department of Liquor Control (DLC) – *RFP Development, System Selection, Contract Negotiation, and Project Management for Retail and POS Solution (05/2014 to 02/2015).*

Zach served as a project management assistant for this multiyear software and hardware implementation, which involved the configuration, design, and deployment of a new solution for DLC and the approximately 80 contracted liquor retail agents throughout the State. Zach's duties included assisting in management of project scope, schedule, and cost; conducting regular status meetings; preparing status reports; and communicating continuously with project stakeholders.

Massachusetts Office of the State Auditor (OSA) – *IT Roadmap and Staffing Plan (06/2013 to 08/2013).*

Zach worked with BerryDunn consultants and the Massachusetts OSA on an IT staffing project and assisted with several tasks, including developing an electronic survey, monitoring responses, and analyzing open-ended responses so that the information could be quantified and summarized; writing several sections of the state's IT Staffing Plan based on the information he compiled from the survey; and researching and compiling disparate information into coherent and well-organized appendices.

Massachusetts HIX/IES Entities – *IV&V Services (05/2013 to 08/2013).*

Zach worked with the BerryDunn project team to analyze system implementation requirements and create user test cases to demonstrate system requirements had been met.

THIS IS TO CERTIFY THAT

Zachary J. Rioux

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Jennifer Tharp | Chair, Board of Directors

Pierre Le Manh | President & CEO

PMP® Number: 2036031   PMP® Original Grant Date: 04 May 2017   PMP® Expiration Date: 04 May 2026

 BerryDunn

Charles K. Leadbetter, PMP®, Prosci® CCP
Program Lead and Services Principal, HIE

Years of Applicable Experience: 29

Years of Relevant Experience Supporting PRDoH & PRMP: 3

Education and Certifications

BS, Computer Science and Economics, University of Maine

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

Charlie is a principal and leads BerryDunn's State Government Practice Group. He has provided executive leadership for state agencies across the country for over 29 years. He offers this project best practices in project oversight, project health assessments, Quality Assurance (QA), IV&V, project management, and engagement oversight. He has experience managing large state, high stakes projects and utilizes project management best practices during all of his engagements.

Key Qualifications

❖ Leader of State Government Practice Group

❖ 25 years of state agency consulting experience

❖ Expertise in project health assessments, quality assurance, IV&V, and project management

❖ Experience with planning and implementation of large, complex systems

❖ Prosci® Certified Change Practitioner (CCP)

❖ Certified Project Management Professional® since 2006

Relevant Experience

BerryDunn (1993 to present)

PRDoH – *Health Information Technology (HIT)/HIE Support Services (04/2020 to present).*
Charlie serves as project principal for the BerryDunn team assisting the PRDoH with planning and implementation of an HIE. BerryDunn is performing an HIT assessment and developing recommendations for an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is also providing project management services and supports updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.

Arizona Health Care Cost Containment System (AHCCCS) – *IT Governance, Risk and Compliance Implementation (08/2023 to present).*
Charlie serves as project principal on the BerryDunn team providing implementation of the IT governance and risk management roadmap recently developed by BerryDunn for AHCCCS's IT Governance, Risk, and Compliance (GRC) team. BerryDunn collaborates with the GRC team in collecting data, information mapping, and implementing the IT governance and risk management roadmap to the desired maturity levels within the COBIT 2019 framework while satisfying ITIL aspects throughout.

Vermont Secretary of State – *IT Strategic Planning (08/2023 to present).*
Charlie is project principal on the BerryDunn team providing assistance in the creation of an IT Strategy Implementation Plan. The SOS requires an increased level of support to successfully procure, design/configure, develop, test, implement, and operationalize new systems while supporting all other IT needs simultaneously. As the SOS' office continues to deepen its reliance on IT services as part of its core service offerings, the support staff for those systems has not grown at equal pace. Due to the convergence of IT project needs over the next several years, BerryDunn was contracted to assist

in documenting the current and planned IT projects and the desired organizational/staffing support structure as well as conduct a gap analysis and provide an implementation plan.

Missouri Office of Administration – *Digital Government Transformation (DGT) Program Management Services (02/2023 to present).*

Charlie serves as principal on the BerryDunn team performing project management planning, oversight, and related services for the State's DGT initiative. The portfolio includes four project areas consisting of citizen journey mapping, Microsoft 365 implementation, enterprise application infrastructure, and citizen portal and data lake development. The DGT portfolio of projects will be implemented for all Executive, Judicial, and Legislative agencies of the State of Missouri.

Washington Department of Social and Health Services (DSHS) – *Organizational Development Subject Matter Expertise (11/2022 to present).*

Charlie serves as principal on the BerryDunn team providing organizational assessment, organizational change management, and IT governance framework services as DSHS restructures their information technology units to form a new administration, called the Technology Innovation Administration (TIA), which leverages a workforce of over 700 staff.

West Virginia Bureau for Public Health (BPH) – *Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (01/2021 to present).*

Charlie serves as project principal for the BerryDunn team providing project management to the BPH as it maximizes COVID-19-related grants. BerryDunn provides grants management support for the ELC-ED Project and the Bureau's Data Modernization Initiative, including a baseline assessment, strategic implementation plan, and a workforce assessment and development plan.

West Virginia BPH – *Electronic Vital Records System (EVRS) Implementation (02/2020 to present).*

Charlie serves as project principal for the BerryDunn team providing project management implementation services for a new electronic vital records system. BerryDunn facilitates stakeholder involvement and organizational change management as the State migrates all historical data from the paper-based system to a simple web-based platform for internal and external users.

West Virginia Department of Health and Human Resources (DHHR) – *Child Welfare Initiatives Project Management Services (10/2018 to 02/2020; 01/2020 to present).*

Charlie serves as project principal for the BerryDunn team providing project management services that strengthen execution of priority Bureau for Children and Families initiatives and help ensure programmatic and policy changes are being managed to support the State project teams making funding, prioritization, resourcing, and technical decisions.

West Virginia BPH – *Strategic Map Implementation Support and Performance Management/Quality Improvement Planning (10/2019 to present).*

Charlie serves as project principal for the BerryDunn team providing project management and guidance in development of a Performance Management and Quality Improvement (PMQI) Plan. BerryDunn provides project oversight services, reporting the project status to the sponsor and project leads monthly, weekly, and as needed. With the development of a PMQI Plan, BerryDunn builds capacity to use data to measure performance, solidifies a commitment to continuous improvement, and provides guidance to staff on leveraging quality improvement (QI) tools and techniques.

Oregon Enterprise Information Services (EIS) – *Core Services Development Performance Management (03/2022 to 06/2023).*

Charlie served as project principal for the BerryDunn team aligning the EIS Office of Data Governance and Transparency's (ODGT's) strategy and goals with tactical and operational actions for each of EIS's divisions. The team worked with EIS to develop a performance management plan and other strategic documentation to assist EIS in executing and measuring performance of their divisions against their goals. The team also assisted EIS with understanding and documenting service and operational dependencies and relationships between their divisions to help improve coordination and effectiveness/efficiency of operations.

AHCCCS – *IT Governance and Risk Development Project (10/2021 to 04/2022).*

Charlie served as project principal for the BerryDunn team performing an IT governance maturity assessment for AHCCCS. The assessment involved the selection of an IT governance framework for AHCCCS' IT services department, determining the department's current and desired maturity levels based on environmental factors, updating the agency's internal controls, evaluating AHCCCS' information and technology risk exposure, and creating a strategic roadmap to address gaps identified during the assessment.

Hawai'i Department of Health (DOH) – *Business Process Redesign for Behavioral Health Administration (BHA) (12/2020 to 10/2021).*
Charlie served as project principal for the BerryDunn team providing business process redesign project implementation services. Key activities included performing a current environment assessment, facilitating business process redesign activities, performing organizational change management, developing IT system requirements and an RFP for a solution integrator for a case management and electronic health record solution, and providing procurement support.

Arizona Department of Economic Security (ADES) – *AZTECS, AzCCATs, and LIHEAP Modernization Planning Project (AALMPP) Feasibility Study (04/2020 to 02/2021).*
Charlie served as project principal for the BerryDunn team assisting ADES in planning for the replacement of three legacy mainframe systems. This project involved performing a requirements analysis, alternatives analysis, and a cost benefit analysis to develop a thorough Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.

West Virginia BPH – *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to 01/2021).*
Charlie served as project principal for the BerryDunn team providing process mapping, requirements gathering, and procedure manual development for the Children and Youth with Special Health Care Needs Program (CYSHCN). BerryDunn worked with the program to refine and finalize the Procedure Manual to align with the eight CYSHCN National Standards. The Program was able to implement streamlined processes and a detailed requirements repository, which allows the Program to finalize a Request for Quotation (RFQ) or Request for Proposal (RFP) to procure a new care coordination and case management solution. Collectively, the business processes and case management system support the Program in improved efficiency and quality of care coordination and integration of information services.

West Virginia BPH – *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020).*
Charlie was project principal on the BerryDunn team providing fact-finding and requirements gathering for a new EMS data system. BerryDunn conducted joint requirements planning sessions to refine the requirements and draft a Request for Quotation (RFQ) and worked with West Virginia Purchasing to finalize and release the RFQ, coordinate responses to vendor questions, and assist with scoring vendor proposals. As a result of a robust procurement process, Office of Emergency Medical Services has contracted with a new EMS data system vendor to implement a system that more fully meets their needs, including robust reporting and analytics, and improved ease-of-use for staff and stakeholders.

West Virginia BPH – *HIV and Hepatitis Workflow/Business Process Analysis and System Configuration (09/2019 to 06/2020).*
Charlie served as project principal for the BerryDunn team providing process mapping and a workflow efficiency assessment. BerryDunn redesigned current processes for case management, defined process improvements that aligned with organizational goals, and developed training and implementation support materials.

Indiana State Department of Health Maternal and Child Health (MCH) – *Data System Assessment (08/2019 to 02/2020).*
Charlie was project principal and assessed the current MCH data systems and end-user applications, identified gaps, made recommendations, and developed requirements to help enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs included, but were not limited to, health information exchange (HIE) systems interoperability, robust Extract, Transform, and Load (ETL) processes, provider access and information sharing, and data management as it relates to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.

West Virginia BPH – *Public Health Accreditation Preparation Project (10/2018 to 09/2019).*
Charlie served as project principal for the BerryDunn team, providing gap analysis assessing BPH documentation and conformity to Public Health Accreditation Board guidelines. A Gap Analysis and Recommendations Report identified areas where BPH documentation was a gap, partially complete, or complete, for each of the 108 measures required for PHAB accreditation. BerryDunn provided recommendations to address gaps, review documentation that might expire, update documentation, and adhere to PHAB documentation guidance.

Washington Health Benefit Exchange (WAHBE) – *Operations and Maintenance (O&M) System Integrator Re-Procurement Planning (05/2018 to 05/2019).*
Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.

Andrea Thrash, PMP®
Program Lead, Certification and Compliance Support Program
Business Lead, Other EOMC Support

Years of Applicable Experience: 30
Years of Relevant Experience Supporting PRDoH & PRMP: 4
Education and Certifications

BA, Accounting, Ouachita Baptist University

Certified Project Management Professional® (PMP®), Project Management Institute® (PMI®)

Certified Trainer MPG (Managing Personal Growth), Blessing & White Consultants

Train-the-Trainer Graduate – NYNEX Business Center Learning Network

Andrea is a PMP® certified project manager with over 30 years of experience in project management and business process engineering. She has a strong background in system development and implementation as well as industry experience in healthcare, insurance, and government. She is versatile in leading technical (SDLC), business, and methodology related projects, bringing a balance of technical, business, critical thinking, and relationship building to successfully execute strategic initiatives. In addition to her successful project and program management background, her experience includes leading Business Analyst (BA) and Quality Assurance (QA) teams, defining, implementing, and monitoring best practices, and subcontractor management.

Key Qualifications

- ❖ Over six years' experience with Project and Program Management within Medicaid agencies
- ❖ Successful experience leading and implementing complex multiyear technology projects
- ❖ Six years' experience supporting Health and Human Services (HHS) agency projects in Puerto Rico, Arkansas, Missouri, and West Virginia
- ❖ Four years' experience with CMS Systems Streamlined Modular Certification
- ❖ Over 30 years of comprehensive program and project management experience
- ❖ 10 years' experience leading process improvement initiatives
- ❖ Four years' experience with Organizational Change Management

Relevant Experience

BerryDunn (06/2019 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (06/2019 to present)*.

Andrea is currently a program manager for BerryDunn's partnership with PRMP, supporting the team across the engagement. Areas of focus are Streamlined Modular Certification, Organization Change Management, and Subproject Support. Subprojects Andrea has provided leadership on include Enterprise Date Warehouse, writing standard operating procedures, Public Health Emergency Unwind efforts, Eligibility Policy and Procedure manual rewrite, Enrollment and Eligibility operations training manual, MEDITI3G DDI contract SLA research and analysis, Medicaid Leadership Institute application, and providing talking points for meetings with the federal government.

Murphy USA (09/2016 to 03/2019)

Andrea served as a program manager in various capacities at Murphy USA. She led a corporate risk mitigation project that led to identifying business functionality and processes that provided an $800K savings over two years. Prior to this,

she was responsible for the implementation of a Data Warehouse where she built and managed the development and QA teams and implemented processes for development, support, and maintenance. This led to Andrea providing management for the development of analytics dashboards and reports for the newly developed loyalty program. These dashboards provided immediate access to data, allowing executive leadership to make fast, informed decisions on the program roll-out. Throughout these projects, Andrea managed project teams comprised of in-house talent and multiple vendor partners including onshore, near-shore, and offshore resources.

Rose International/BerryDunn (04/2016 to 06/2016)

Andrea was hired for a three-month contract to support the following BerryDunn projects:

✓ **Missouri Department of Social Services –** *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (04/2016 to 06/2016).*
To support the success of BerryDunn's IV&V team and the MEDES, Andrea evaluated project documentation for completeness, traceability, compliance, and risk flags. Based on her analysis, she formulated improvement recommendations and risk mitigation options. Additionally, Andrea participated in developing weekly and monthly reporting to the State and CMS.

✓ **West Virginia Bureau for Medical Services (BMS) –** *Project Management of MMIS Procurement, DDI, and Certification (04/2016 to 06/2016).*
As part of BerryDunn's team, Andrea implemented process improvements and introduced project management proficiencies, including development of project tasks and action item management.

EngagePoint (12/2012 to 05/2015)

✓ **State of Missouri** – *Medicaid Project (02/2015 to 05/2015).*
For MEDES, Andrea assessed business requirements/analysis and change control processes. This entailed recommending process and resource changes, which streamlined efficiency and productivity and reduced staff by 1.5 FTE.

✓ **Arkansas Department of Human Services** – *MEDES (01/2013 to 01/2015).*
Andrea worked as a project manager and business analysis manager with Arkansas' MEDES, where she defined and implemented project processes for the newly formed project team, including business requirements/analysis, testing, defect management, scope, and change control. She worked with stakeholders to define scope and timeline for development and implementation of system features. Her position also required managing a multi-vendor Business Analyst Team, and she was responsible for end-to-end requirements, enrollment and eligibility determination process mapping, integration into the Cúram system, and interface to MMIS.

Colonial Life & Accident Insurance Company (09/2002 to 08/2011)

On various consulting projects for Colonial Insurance, Andrea served as a senior project manager, program manager, and business analyst.

As a senior project manager, she was responsible for the company's highest-priority projects, including TIBCO BPM implementation, telephony implementation using I3 software, growth initiatives, and sales and marketing tools. She provided project governance for development of a BPM customer solution that drove a 25% efficiency improvement for the business.

She also served as program manager for the company's 2010 seven strategic growth initiatives. During this time, she managed development of a business case and prototype for a new innovative user interface concept for the next generation work management system/BPM platform, using Microsoft UI pivot technology. She also led the successful development of a new marketing presentation tool using outside vendors.

Prior to 2010, she led multiple projects in the developmental cycles of a $45MM enterprise-level, web-based insurance eligibility and enrollment system and its offline counterpart. Her responsibilities ranged from strategic planning, program and project management, PMO development, leading business analysts, and managing quality assurance efforts. Many of the projects she managed were within the enrollment system program, related to the initial design and flow, price quote, electronic signature process, product portfolio, and the offline component with data syncing. She also introduced and implemented business processes, use cases, documentation templates, and methodologies that served as process guidelines for a project team spanning multiple departments. This led to an iterative and more agile development process and was adopted throughout the PMO and IT organizations.

Cook Systems International (10/1999 to 10/2001)

✓ **Arkansas Department of Information Systems** – *Workforce Investment Act Project (10/1999 to 10/2001).* Andrea was responsible for development of a web-based client-server application to support the Workforce Investment Act of 1998. She managed a diverse project team, ranging from 15 to 35 members throughout the project life cycle. Project was delivered on time and within budget guidelines.

BerryDunn

THIS IS TO CERTIFY THAT

Andrea L Thrash

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Jennifer Tharp | Chair, Board of Directors

Pierre Le Manh | President & CEO

PMP® Number: 291373   PMP® Original Grant Date: 19 September 2005   PMP® Expiration Date: 19 September 2024

Jason Hargrove, MBA, PMP®, CSM®, Prosci® CCP
Program Lead, Strategic Planning and Procurement Support Program

Years of Applicable Experience: 25
Years of Relevant Experience Supporting PRDoH & PRMP: <1

Education and Certifications

MBA, Business Administration, Grantham University

BS, Marine Engineering Operations, Maine Maritime Academy

Certified Project Management Professional® (PMP®)

Certified ScrumMaster®, Scrum Alliance

Certified Agile Leader® (CAL-E, CAL-T), Scrum Alliance

Prosci® Certified Change Practitioner

Jason is an experienced leader and implementation manager, delivering information technology software solutions and services in healthcare and engineering for over 25 years. Jason brings a diverse range of skills and experience including project management, procurement management, business development, finance, budgeting, contract management, team development, recruiting, and staff management. He leads by example, fostering communication at all levels of the organization and is familiar with complex and difficult situations.

Key Qualifications

- ❖ Over 25 years' experience in program and project management
- ❖ 15 years of program management in the healthcare/Medicaid space
- ❖ 17 years' demonstrated leadership across multiple Medicaid healthcare disciplines, including Pharmacy Claims Processing, Drug Rebate, Medical Prior Authorization, Mailroom Data Capture, Call Centers, Data Analytics, Finance, Human Resources, EVV and RAC, overseeing MES implementation and operational activities
- ❖ Over 17 years of experience in supporting Health and Human Service (HHS) agency projects in states such as Alaska, Delaware, Iowa, Maine, Illinois, Ohio, Utah, Vermont, West Virginia, and Wyoming
- ❖ Experience leading large and diverse teams
- ❖ Thorough understanding of PMI®'s PMBOK®, PMP® certified since 2004 and CSM® certified as well as CAL-E and CAL-T, Scrum Alliance

Relevant Experience

BerryDunn (02/2018 to present)

Jason participates in a leadership capacity with several clients. He is currently focused on resource development, strategic planning, Advance Planning Documents (APDs), solicitations (i.e., RFQs, RFPs), large technology implementations, and vendor oversight.

Iowa Department of Human Services (DHS) – *Medicaid Procurement of Acquisition Support Services (MES) (04/2022 to present).*
Jason is the program manager for BerryDunn's team assisting DHS with modernization and procurement acquisition support services, including visioning, researching, planning, and developing solicitations. Jason is currently leading BerryDunn's team with the development of a pharmacy RFP and supporting the development of several APDs.

Alaska Division of Health Care Services (HCS) – *Medicaid Management Information System (MMIS) Modernization (09/2020 to present).*
Jason is the engagement manager for BerryDunn's team supporting HCS's MES modernization and procurement activities collaborating directly with HCS leadership. He has led the team to develop an initial modernization strategy, the creation of a Fiscal Agent (FA), and an MMIS Systems solicitation. He is providing subject matter expertise, visioning,

researching, and supporting the solicitation processes. Jason is also assisting the transition of services, vendor onboarding, and contract adherence.

Delaware Department of Health and Social Services (DHSS) – Division of Medicaid and Medical Assistance (DMMA) – *APD Consulting Services (06/2021 to present).*

As the senior analyst, Jason is a part of the team supporting the Delaware DHSS DMMA APD Consulting Services Project, which includes developing, updating, and tracking DHSS DMMA's APDs. In his role, Jason provides senior-level input and design in the drafting of APD documents, MDBT files, as well as updates to federal guidance. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Jason continues to provide support in a training and oversight capacity, specifically focused on APD financials.

West Virginia Bureau for Medical Services (BMS) – *Enterprise Program Management Office (EPMO) (11/2018 to present).*

Jason supports the engagement as a subject matter expert (SME) in several operational areas:

- ✓ Strategic planning
- ✓ Resource management and tracking
- ✓ Budget and scope development
- ✓ Project management methodology and standards
- ✓ Medicaid Information Technology Architecture (MITA) and Medicaid Management Information Systems (MMIS) APD updates, maintenance, and forecasting (multiple iterations)

West Virginia Bureau for Medical Services (BMS) – *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to 06/2023).*

Jason served multiple roles on this successfully completed project, including as an EVV SME and as the implementation project manager. As project manager, Jason assisted BMS with the implementation of their overall EVV solution, which included strategic planning, requirement development, stakeholder engagement, solicitation development, APD and financial funding, evaluation support, vendor onboarding, and CMS certification support.

Northern New England Diagnostics (02/2017 to 08/2017)

As chief of operations, Jason developed client implementation process/strategy, created detailed plans for new client onboarding and oversaw all operational staff, internal systems, and business processes. Jason was also responsible for performing staff and operational assessments regarding quality and production, developing staff training and mentoring plans for development and quality improvement, and helping ensure services met quality and cost effectiveness standards. Jason created and maintained profit and loss financials and associated data models to assist with client valuation and forecasting.

Change Healthcare (formerly Goold Health Systems / Emdeon) (11/2005 to 02/2017)

While at Change Healthcare, Jason held several important roles including Senior Director of Pharmacy Administration Services, Vice President of Administration, Director of Administrative Services, and Strategic Project Manager. Jason contributed to the success of Change Healthcare by providing oversight for multiple operational and implementation initiatives and helped ensure that business development objectives were achieved. He led or contributed to multiple successful procurements and developed and implemented project management tools and tracking methods.

Some of Jason's major projects included:

- ✓ *Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017).*
  Jason served in several capacities on the Ohio project including business development, project leadership, and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal, and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams, and coordinating on-site staff. During the project, the named implementation manager left the organization, and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation, and client relations.

- ✓ *Vermont Department of Vermont Health Access PBM (06/2014 to 07/2015).*
  Jason provided leadership support for project management oversight and contract negotiation, and he supervised

the implementation of all PBA activities, staff management, and SLA performance. Jason also served as the initial client escalation point.

✓ *Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016).*
As the lead implementation manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, and coordination of multiple internal and external stakeholders including regular client meetings.

✓ *Iowa Medicaid Enterprise PBM (04/2012 to 10/2013).*
Jason led the re-procurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to the client's CMS strategy, and develop key project deliverables. In addition, Jason coordinated the efforts of SMEs in the development of artifacts, client reviews, meeting facilitation, and regular updates with client and corporate management.

✓ *Utah CMS certification support (2012).*
Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts, and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process, and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.

✓ *Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 to 10/2011).*
Jason served as the implementation project manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and management, meeting facilitation, risk and issue management, report management, and client engagement. This project also included more intensive training of state staff and product education, change request management, and issue resolution.

✓ *Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 to 05/2009).*
As the project manager, Jason worked closely with internal business leads and the client to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders, and the incumbent vendor. Typical project activities included meeting facilitation and requirement, risk, and action item management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client, and business SMEs to successfully help certify the system.

BerryDunn

Project Management Institute.

THIS IS TO CERTIFY THAT

Jason K. Hargrove

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE
IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND
RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Jennifer Tharp | Chair, Board of Directors

Pierre Le Manh | President & CEO

PMP® Number: 193608   PMP® Original Grant Date: 09 July 2004   PMP® Expiration Date: 09 July 2026

Kim Brandt, MBA, PMP®, Prosci®, CCP
Program Lead, Program Management Support Program
Business Lead, Enterprise Governance and Strategic Alignment, Outcomes Management, and Reporting

Years of Applicable Experience: 35

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

MBA, William Woods University

BS, Computer Information Systems, Central Missouri State University

Certified Project Management Professional®, Project Management Institute®

Prosci® Certified Change Practitioner

Kim is a program, project, and change management professional with more than 35 years of experience successfully leading projects in large-scale Medicaid and integrated eligibility healthcare applications. Offering a broad range of technical and leadership proficiencies, Kim is focused on providing process improvement, program and project management, certification, strategic planning, operational assessment, and independent verification and validation (IV&V) services to help clients with information technology (IT) planning, implementation, and operations. Kim has helped Medicaid agencies in states or territories such as Missouri, Ohio, North Dakota, and Puerto Rico be successful on large Medicaid IT projects by providing her extensive experience and deep understanding of the ever-changing healthcare landscape.

Key Qualifications

- ❖ Over 30 years of program and project management in large-scale Medicaid and integrated eligibility healthcare applications
- ❖ Over 20 years of program management experience across multiple Medicaid healthcare disciplines, including MMIS and Eligibility and Enrollment domains
- ❖ More than 35 years of business analysis, change management, process improvement, project management, risk and issue management, and strategic planning experience in health and human services programs such as Medicaid, Medicare, Temporary Assistance for Needy Families (TANF), and Supplemental Nutrition Assistance Program (SNAP)
- ❖ Over nine years of government health and human services consulting experience
- ❖ Over seven years providing project management of IV&V services for Missouri's Eligibility Determination and Enrollment System (MEDES) implementation built on the IBM® Cúram Social Program Management platform
- ❖ Over 22 years of experience and thorough understanding of utilizing Project Management Body of Knowledge® (PMBOK®) program and project management best practices
- ❖ More than 35 years of involvement with federally funded projects
- ❖ Knowledge of Centers for Medicare & Medicaid Services (CMS) Seven Standards and Conditions, including the Medicaid Information Technology Architecture (MITA)
- ❖ Over nine years of experience with CMS' outcomes-based certification process, including CMS' Enterprise Life Cycle (ELC) Gate Review Process, Medicaid Eligibility & Enrollment Toolkit (MEET), and Medicaid Enterprise Certification Toolkit (MECT)
- ❖ Adept with industry-standard and best practices regarding quality and quality control principles and techniques such as Six Sigma,

Capability Maturity Model (CMM), Control Objectives for Information and Related Technology (COBIT), and/or Information Technology Infrastructure Library (ITIL)

- ❖ Proficient in software development life cycle (SDLC) methodologies, including Waterfall, Agile, and DevOps
- ❖ Experience with organizational change management and business process reengineering

Relevant Experience

BerryDunn (05/2014 to present)

- ✓ **Puerto Rico Medicaid Program (PRMP) –** *Enterprise Objective Monitoring and Control (EOMC) Services (01/2022 to present).*
Kim serves as a Program Manager in BerryDunn's partnership with PRMP as they transform their Medicaid Enterprise. BerryDunn's EOMC services include helping Puerto Rico establish a Program Management Office, complete strategic planning for their enterprise while documenting it in a MITA SS-A update, complete certification of multiple modules such as their IES, guide and support them through the Payment Error Rate Measurement (PERM) cycle, and transition aspects of operations from system vendor staff to the PRMP staff.

- ✓ **Ohio Department of Administrative Services (DAS) –** *Ohio Benefits Program IV&V Services (04/2021 to 7/2023).*
Kim provided engagement management support to BerryDunn's IV&V team that was supporting Ohio's integrated eligibility application—Ohio Benefits. BerryDunn was supporting Ohio in implementing an eligibility application that was consumer-centric and easy to navigate, promoted care coordination, improved administrative efficiencies, and enhanced the delivery of healthcare services that were specific to an individual's needs. Kim was responsible for managing client expectations and advised on delivery and execution of the engagement.

- ✓ **Ohio Department of Medicaid (ODM) –** *Ohio Medicaid Enterprise System (OMES) IV&V Services Engagement (10/2019 to 7/2022).*
ODM was implementing a modular MMIS through the OMES project. Through BerryDunn's IV&V services, Kim was providing engagement management support to the BerryDunn IV&V team, helping ODM's OMES complete the implementation for the following modules: Advanced Data Analytics Tool (ADAT), Electronic Data Interchange (EDI), Fiscal Intermediary (FI), Provider Network Management (PNM), and Single Pharmacy Benefits Manager (SPBM). In addition, Kim was providing guidance and supporting ODM's outcomes-based certification approach for the PNM and SPBM modules and had been instrumental in recommending revisions to the ODM program governance model, which resulted in improvement of ODM's decision-making processes.

- ✓ **Missouri Department of Social Services –** *MEDES IV&V Services (05/2014 to 2/2022).*
Since December 2019, Kim has been serving as engagement manager for the MEDES IV&V project, performing oversight of BerryDunn's project team, reinforcing the highest quality of services, and collaborating with MEDES leadership to help ensure it is fully satisfied with BerryDunn's services and deliverables. Prior to December 2019, Kim served as the project manager, leading a team that assessed MEDES project health, reviewed over 50 project deliverables, evaluated MEDES progress against CMS' MEET requirements, produced over 145 IV&V progress reports, identified potential risks and issues, and offered recommendations for mitigation. Between 2016 and 2019, Kim collaborated with the MEDES Project Management Organization (PMO) and systems vendors to help facilitate more than 250 production deployments to MEDES, providing improved functionality and a large number of improvements and efficiencies for both State workers and Missouri citizens. Finally, Kim contributed to the Post-Operational (R3) Milestone Review of MEDES conducted by CMS on March 14 – 15, 2019, resulting in Missouri successfully meeting the requirements for R3.

- ✓ **North Dakota Information Technology (NDIT) and Department of Human Services (DHS)** – *SPACES Integrated Eligibility System Operational Assessment (08/2020 to 01/31/2021).*
DHS has implemented an integrated eligibility system for economic assistance programs that include the Affordable Care Act (ACA) Medicaid, Child Care Assistance, SNAP, TANF, and non-ACA Medicaid. As project manager, Kim led a team of BerryDunn professionals who performed an operational assessment to help ensure that the SPACES services are performed in an optimum manner that is consistent with best practices in the

industry and to create a baseline against which DHS will measure future performance. The project culminated with the creation of an operational assessment report that provided findings, recommendations, and a high level strategy outlining tactical steps and actions to help North Dakota achieve its future vision and goals for SPACES.

Infocrossing, a Wipro Company (2006 to 2014)

Kim served as the director of business development for Infocrossing, where she was accountable for developing the first strategic account plan for Infocrossing's Missouri business unit. This resulted in the delivery of more than three value-add offerings for Infocrossing's Missouri client. In addition, Kim provided tactical direction to two strategic consultants and one lobbyist firm, resulting in legislative support for Infocrossing's new business opportunities. Kim also led the development of more than 10 proposals, which resulted in awards that included the Missouri Health Information Technology RFP resulting in new revenue exceeding $500,000 and the Nebraska Integrated Eligibility System RFP, resulting in new revenue exceeding $2.5 million.

Prior to this position, she served as the director of information technology, managing a technical and non-technical IT Department of over 100 resources, including both FTE and contractor staff. She was responsible for IT budget and financial results and for the successful delivery of over 100 SLAs of all /systems, PMO, and network components of the Missouri Medicaid Fiscal Agent Account. She implemented practices to develop people, improve IT business processes, and enact technology standards, and she developed winning strategies that resulted in a $400 million Missouri Medicaid Management Information System (MMIS) Fiscal Agent contract win in 2007.

Verizon/Infocrossing (2002 to 2006)

Kim worked as a systems manager for the Verizon Health Care Division before it was acquired by Infocrossing in 2004. She managed a technical and non-technical IT Department of 50 and was responsible for managing the departmental budget and performance objectives. She also managed multi-million dollar organization projects, contributing to business effectiveness and efficiency. These projects included enhancements to the claims processing system, such as the automation of third-party liability leads and drug and behavior health prior authorizations; data entry using imaged claims; and a new claims imaging system. These enhancements led to faster claims processing time, fewer errors, and a reduction in cost to the State Medicaid program.

In addition, Kim led SDLC process improvements by introducing project management proficiencies; implemented resource, project, and finance forecasting models; led and participated in strategic planning efforts of the Fiscal Agent contract; and successfully managed budget reductions within the IT Department.

GTE Data Services (1988 to 2002)

Kim held multiple positions during her years with GTE Data Services. As a project manager, she provided leadership, direction, and guidance in the delivery of a comprehensive disaster recovery capability for the Missouri MMIS. She managed a large project team responsible for Y2K remediation efforts of the Missouri MMIS system and developed and documented project management methodologies for use by the IT Department. The project team that she led successfully established technical solutions for business as usual enhancement requirements during the Missouri Medicaid RFP process.

While serving as a systems supervisor, Kim generated revenues in excess of $5.1 million for successfully managing a 30+-member project team during a critical phase of the Missouri managed care enhancement. She controlled, managed, and approved the development and maintenance activities of the Missouri MMIS through the supervision of systems personnel; assisted in the development of a Year 2000 testing tool (waY2Kool) estimated to save hundreds of man-hours in the Missouri Medicaid Y2K project; and stimulated a 5- to 12-person technical team in delivering quality modifications to the Missouri MMIS.

Kim also served as a project lead / interim systems supervisor for GTE, where she led and supervised a technical team of 5 – 10 people. She developed time lines and detailed work plans in conjunction with team members and supervised many full development life cycle projects, which included delivery and production support.

As a systems analyst, Kim was responsible for system development life cycle on maintenance and modification activities to the Missouri MMIS. She participated as a lead project team member in a major enhancement rewrite of claim adjudication processing and assisted in the 1993 Missouri Medicaid RFP process.

Project Management Institute
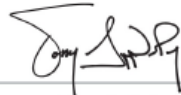
THIS IS TO CERTIFY THAT

Kimberly M. Brandt

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED EXPERIENCE, KNOWLEDGE AND PERFORMANCE IN ACHIEVING AN ORGANIZATIONAL OBJECTIVE THROUGH DEFINING AND OVERSEEING PROJECTS AND RESOURCES AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Project Management Professional (PMP)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE

Tony Appleby
Chair, Board of Directors

Sunil Prashara
President and Chief Executive Officer

PMP® Number:	21514
PMP® Original Grant Date:	07 January 2000
PMP® Expiration Date:	06 January 2025

PMI Project Management Institute

Shardae Bunche, MPH
Program Lead, Policy Management Support Program
Business Lead, Policy and SPA

Years of Applicable Experience: 10

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

MPH, Florida A&M University

Lean Six Sigma Green Belt

Shardae is a Medicaid and healthcare professional with more than 10 years of experience in health policy, healthcare management, public health, and health systems management. She has experience in project management, policy consulting, and working with state Medicaid and health agencies. Other experience includes leading multiple project teams, facilitating meetings with executive leadership to build process mapping, developing project plans, budgets, and schedules, leading Medicaid State Plan Amendment processes to approval status as well as leading and assisting with documenting business requirements.

Key Qualifications

- ❖ Five years' experience managing Medicaid Program with Georgia Department of Behavioral Health
- ❖ 10 years' experience in Medicaid Program policy
- ❖ Completed "Program Management Foundations" course and has five years of program management experience
- ❖ Client Relations
- ❖ Leading Projects
- ❖ Project Management/Program Management
- ❖ Policy Analysis

Relevant Experience

BerryDunn (12/2021 to present)

Shardae is a manager with BerryDunn's Medicaid Practice Group. Shardae has worked as Lead on multiple Medicaid projects which include MITA, State Plan Amendments, and Money Follows the Person (MFP) for Puerto Rico Medicaid Program. Her team has successfully worked with Puerto Rico to achieve approval for several SPAs that have positively impacted the residents of Puerto Rico. Shardae provides great customer service and support to clients as it relates to Medicaid policy.

Incept Data Solutions, Inc. (12/2019 to 12/2021)

As a policy consultant, Shardae was responsible for the review of all Medicaid and Children's Health Insurance Program (CHIP)-related policies, including state and federal policies, rules, regulations, and sub-regulatory guidance; advising PERM data processing and review staff on interpretation of policy; and discussing the effect of policy on review. She helped to ensure all policy related requirements and deliverables listed in the PERM SOW are completed thoroughly and timely, including compilation and completion of each state's Master Policy List, upload and processing of all state policies, and compilation and completion of the Federal Regulation tracker. She also worked with data processing and medical review SMEs to discuss policy interpretation, as well as applications development staff to help ensure all policies are uploaded properly as required in the SOW.

Georgia Department of Behavioral Health and Developmental Disabilities (2014 to 10/2019)

As a Medicaid and Health Systems Manager, Shardae coordinated with the Division of Mental Health and Addictive Diseases and Administrative Services to design and develop new Medicaid programs and Medicaid program amendment(s) and to support the Department of Community Health in behavioral health-related programs. She served as a key Medicaid subject matter expert (SME) in new systems implementation, helping ensure accuracy with business requirements and functional specifications and as an analyst for major IT initiatives, including MMIS change service requests (CSRs) between DBHDD and Medicaid Agency.

Florida Agency for Health Care Administration – Medicaid Services (2012 to 2014)

As a medical/healthcare program analyst, Shardae managed two managed care organization contracts within the Bureau of Medicaid Services as well as Medicaid reimbursement program operations, and she coordinated program policy development and implementation. She represented the Agency as a program subject matter expert at public presentations; provided assistance to Medicaid recipients, providers, and stakeholders with policy related issues; analyzed and developed fiscal impact statements on proposed cost containment measures and program revisions; and conducted policy reviews as well as systems analysis and development.

Shardae also significantly contributed to the Implementation of the 1115 Demonstration Waiver for Statewide Medicaid Managed Care (SMMC) by providing extensive research methods and policy development.

Florida Department of Health – Central Pharmacy (2012)

As an accountant in the procurement office, Shardae provided financial administrative assistance, including maintain purchase logs, managing reimbursements, reconciling invoices, and maintaining fiscal reports.

BerryDunn

Linked in Learning

Program Management Foundations

Course completed by Shardae Bunche, MPH

Sep 29, 2023 at 09:32PM UTC · 55 minutes

Top skills covered

(**Program Management**)

[signature]

Head of Content Strategy, Learning

Program: PMI® Registered Education Provider
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530c6d5eeae8ffa904b82353bac8dd343734293eb000bf58fbd5bedc7384dfc8

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Business Leads

Brennan Pouliot
Business Lead, Procurement
Business Analyst, MMIS PgMO

BerryDunn

Years of Applicable Experience: 6
Years of Relevant Experience Supporting PRDoH & PRMP: 3
Education and Certifications

MPP, University of New Hampshire Carsey School of Public Policy, Concentration on Strategy, Communication, and Policy Analysis

BA, Political Science and Justice Studies, University of New Hampshire

Brennan is a senior consultant with BerryDunn's Medicaid consulting practice, with over five years of experience providing state agencies, the federal government, and private-sector organizations with a broad range of support including project management support and policy analysis. Brennan brings extensive experience in project management, strategic planning, procurement, meeting facilitation, research, policy analysis, and communication. Specific to Medicaid, Brennan specializes in MES modernization and strategic planning, including APD and procurement development and support.

Key Qualifications

❖ Over five years' experience supporting public-sector, and private-sector organizations on healthcare-related projects

❖ Over three years of experience supporting Puerto Rico, Delaware, and Ohio with procurement, funding, project management, and oversight support

❖ MPP, University of New Hampshire Carsey School of Public Policy, Concentration in Strategy, Communication, and Policy Analysis

❖ Experience writing detailed policy reports on a broad range of policy areas, including healthcare policy

❖ Led the development and successful execution of four MES procurements

❖ Manages a team of five resources

Relevant Experience

BerryDunn (07/2020 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (02/2021 to present).*
Brennan is the project manager for the outcomes-based procurement (OBP) service area. In this role, Brennan provides full procurement life cycle support to PRMP, spanning from planning modernization and contract management through procurement development, proposal evaluation, and finally contract award and negotiations. In his role, Brennan serves as a trusted advisor to PRMP, responsible for helping map out the future MES and then implement those plans. Brennan's work requires coordination across the EOMC engagement and the larger PRMP MES, including collaboration with other vendors and projects including APDs, the Program Management Office (PgMO), and the Medicaid Information Technology Architecture (MITA) to help ensure alignment and key stakeholder participation. Additionally, Brennan manages a team of five BerryDunn resources and is responsible for a host of project management responsibilities, including schedule management, risk and issue identification and tracking, reporting, and meeting facilitation. Since the start of Brennan's tenure supporting PRMP, he has helped lead the development and successful execution of six full MES procurements and other related projects.

Delaware Department of Health and Social Services (DHSS) – Division of Medicaid and Medical Assistance (DMMA) – *APD Consulting Services (06/2021 to present).*
Brennan has served in a range of roles supporting DMMA. Initially, Brennan operated as the junior analyst/project coordinator for the project, responsible for developing, updating, and tracking DHSS DMMA's APDs. In that role, Brennan

helped draft APD materials, track APD progress, take meeting minutes, and verified project goals and objectives were met. Brennan has transitioned into the APD SME/deputy project manager role in which he is responsible for managing the client relationship and leading the development of project deliverables including APDs, training documentation, and reports for state and federal partners. Brennan's support and leadership has resulted in at least 20 CMS approved APDs since the start of the project.

Ohio Department of Medicaid (ODM) – *Ohio Medicaid Enterprise System (OMES) IV&V Services (07/2020 to 04/2021).* ODM was implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project, and BerryDunn was providing IV&V support. Brennan served as a consultant on the project, helping provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole. Brennan served as the project lead for risk and issue management. In this role, he focused on risk and issue identification, assessment, mitigation, and strategic planning across the entire OMES program. Brennan led the identification, assessment, and tracking of six risks and issues, and he helped develop and provide ODM with recommended mitigation strategies for each risk and issue.

Additionally, Brennan provided valuable meeting facilitation. Brennan regularly coordinated meeting times, prepared themes overview presentations, organized agendas, took meeting notes, and tracked updates on action items.

Senator Maggie Hassan (01/2020 to 05/2020)

As a constituency services and outreach intern, Brennan was responsible for supporting Senator Hassan's state office. Brennan responded to hundreds of constituent inquiries and worked diligently to provide specific answers to questions and resolutions to cases. He also supported the Senator's office by developing detailed internal memos on a broad range of public policy areas, facilitating engagement events with the Senator, and organizing relevant news clippings into a daily report to keep the Senate staff informed on news in the state.

University of New Hampshire Carsey School of Public Policy (08/2019 to 05/2020)

As a law enforcement research fellow at the Carsey School of Public Policy, Brennan conducted qualitative research which contributed to Professors Daniel Bromberg and Étienne Charbonneau's most recent book on police body-worn camera policy and public trust. Brennan analyzed over 700 survey responses addressing the implementation and evaluation of police body-worn cameras in police departments across the U.S. Brennan helped develop a methodology and coding schemes, analyzed and coded hundreds of qualitative survey responses, conducted literature reviews, and provided frequent, detailed communication to research leads.

Wentworth-Douglass Hospital (05/2019 to 08/2019)

As a government relations and public policy intern, Brennan supported the work of the Director of Government Relations and Public Policy at Wentworth-Douglass Hospital (WDH). Brennan regularly attended meetings with hospital executives, state legislators, and other community and healthcare stakeholders. Brennan helped WDH reach its short- and long-term goals by providing detailed research briefs and policy analysis on state and federal healthcare policy. Additionally, Brennan supported WDH's charitable efforts by creating and maintaining a grant opportunity spreadsheet, which identified and tracked the progress of WDH's grant pursuits and ultimately resulted in WDH receiving thousands of dollars in grants and donations.

University of New Hampshire (01/2019 to 05/2019)

At the University of New Hampshire, Brennan served as a research assistant to a team of three professors studying U.S. immigration law. Prior to starting this role, Brennan successfully completed 10 UNH research training modules which covered a range of research guidelines and best practices. Brennan conducted over 155 hours of independent research, literature reviews, transcribing, and other qualitative research in support of the research team. The experience was highlighted by a capstone presentation on an original research topic that included independent research, literature reviews, and policy recommendations.

New Hampshire Department of Environmental Services (05/2018 to 09/2018)

As a data and records management intern, Brennan successfully developed and implemented a new standard operating procedure to detail the process for digital storage of DES case files. Brennan collaborated with state staff to review previous standards, develop updated standards, and implement best management practices for electronic data storage of case files for the Wetlands Bureau of DES. He then successfully transitioned hundreds of case files from paper to digital

storage, which cleared physical space and improved customer service by allowing for easier access to archived case files. The standard operating procedure that he developed provided consistency and guidance to all bureau staff when trying to access and/or archive case files.

Bianco Professional Association (12/2017 to 05/2018)

As a government affairs intern, Brennan supported the firm's clients by providing crucial insight into state-level legislative, regulatory, and executive activity. He attended daily hearings, meetings, and legislative sessions covering diverse public policy areas including Medicaid, tax, and environmental policy; synthesized complex notes and legislative analysis into concise summary reports for team members and clients; and performed a range of administrative tasks to enhance the productivity, coordination, and preparedness of the entire team.

Christy Schilling
Business Lead, E&E
Subject Matter Expert, E&E PgMO

Years of Applicable Experience: 10
Years of Relevant Experience Supporting PRDoH & PRMP: 4
Education and Certifications

BS, Business Administration – Management and Marketing, Dakota State University

Christy is an ambitious and well-qualified professional with valuable expertise in both Medicaid and the private insurance sector. Christy has 15 years in the health insurance industry and 10 years of experience working with Medicaid policy and federal regulations. Christy has extensive experience in Medicaid eligibility requirements, Payment Error Rate Measurement (PERM) processes, and Streamlined Modular Certification (SMC) activities. She has experience working directly with The Centers for Medicare & Medicaid Services (CMS) on both SMC and PERM efforts with large-scale knowledge of federal regulations and state policies, including their significance to both PERM and SMC efforts. Christy worked with CMS to develop the current eligibility review component of PERM and has led efforts directly with State Medicaid Agencies (SMAs) for the last six years to prepare for, participate in, and develop corrective action plans (CAPs) for the SMA's PERM cycle and SMC efforts.

Christy's areas of subject matter expertise also include Temporary Assistance for Needy Families (TANF), system design and requirements development, and user acceptance testing (UAT).

Key Qualifications

- ❖ Over five years' experience leading efforts with SMAs related to PERM, including preparing for, participating in, and developing CAPs for the SMAs' PERM cycle and SMC efforts
- ❖ 15 years' experience in the healthcare industry
- ❖ 10 years' experience with Medicaid policy and federal regulations
- ❖ Technical and subject matter experience in review systems, audits, and federal compliance measures
- ❖ Excellent written, oral, and interpersonal communication skills

Relevant Experience

BerryDunn (05/2018 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring & Control Services (EOMC) project (01/2020 to present).*
Christy is currently leading multiple efforts in Puerto Rico, including extensive subject matter expertise (SME) for multiple eligibility and enrollment efforts. Christy serves as a CMS eligibility compliance expert to PRMP for all eligibility related updates, including planning and design of required eligibility system changes, policy changes, and other eligibility related questions that arise. Christy has also led the support for PRMP's planning and execution of eligibility determination activities leading up to and following expiration of the COVID-19 Public Health Emergency (PHE).

Christy served as Outcome-Based Certification (OBC)/SMC lead from February 2020 through the implementation and successful certification of the new eligibility and enrollment (E&E) system in February 2023 and continues to provide guidance for additional SMC efforts underway in Puerto Rico.

Additionally, Christy has provided support in other areas such as state plan amendment (SPA) support, development of Puerto Rico's Modified Adjusted Gross Income (MAGI) Verification Plan, updated Eligibility Policy and Procedures Manual, Advanced Planning Document (APD) support, and other areas of subproject request support such as discussion regarding implementation of Medicaid Spenddown and the Verify Lawful Presence (VLP) interface.

West Virginia Bureau for Medical Services (BMS) – *Payment Error Rate Measurement (PERM) Project (05/2018 to 11/2019).*

Christy served as subject matter expert. She worked closely with the State to evaluate and implement new processes and procedures to help ensure federal compliance measures are in place before PERM reviews began.

The Rushmore Group (06/2014 to 05/2018)

Christy served as a subject matter expert, systems analyst, and product manager, working intimately with the Centers for Medicare & Medicaid Services (CMS) for three years to develop the Payment Error Rate Measurement (PERM) process. She has an extensive understanding of state and federal policy and the applicability to PERM eligibility reviews, with in-depth experience working in and understanding the operation and limitation of state eligibility systems.

As a supervisor and quality control specialist overseeing three additional staff members conducting quality reviews of TANF work programs in several states and counties, she conducted re-reviews to help ensure quality reviews were delivered to the client as well as corrective action reviews to help ensure the client was taking action on review findings to improve the quality of the work force program.

In addition, Christy worked closely with internal programmers to design and carry out new review systems through all stages of development as well as necessary updates. She analyzed current review processes to develop individual and personalized review systems for TANF work force and PERM clients, conducted thorough user acceptance testing of all new systems and updates before final implementation, and trained all users of the final systems to help ensure complete understanding of the functionality of the desired system.

South Dakota Division of Insurance (09/2013 to 06/2014)

As a compliance agent, Christy investigated, reported, and suspected cases of fraud and illegal actions by South Dakota licensed insurance agents and insurance agencies. She conducted both planned and unplanned agency audits and approved or denied applications for a South Dakota Insurance Producer's License in situations that the individual disclosed previous actions or illegal charges brought against them in the past.

American Family Life Assurance Company (AFLAC) (05/2010 to 10/2012)

Christy successfully produced and managed personal book of business with both businesses and individuals. As an independent agent, she assessed the personal needs of both businesses and individuals and offered them advice for supplemental insurance products to satisfy their needs.

Fischer Rounds and Associates, Inc. (12/2005 to 05/2010)

As a health insurance agent and account manager, Christy managed health insurance book of business for the company and was broker for more than 100 independent insurance agents in South Dakota. She offered advice to businesses and individuals regarding health insurance options, including employer sponsored plans, individual and family plans, short-term plans, and Medicare supplemental plans. Other duties included assisting individuals with the initial roll-out of the Medicare Part D prescription plans and at open enrollment each year, providing expertise and advice to more than 100 licensed health insurance agents and understanding a wide variety of policy specifics among several insurance companies to help ensure every customer was placed in a policy that met their needs.

Craig White, PMP®, CSSGB, MSIT
Business Lead, SMC

Years of Applicable Experience: 15

Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

Master of Science in Information Technology, North Carolina Agricultural and Technical State University

Bachelor of Science in Business Education – Information Technology, North Carolina Agricultural and Technical State University

Project Management Professional® (PMP®)

Certified Six Sigma Green Belt (CSSGB)

Craig is an experienced IT professional committed to maintaining cutting edge technical and up-to-date industry knowledge and brings over 15 years expertise in the healthcare IT industry. Craig has led several CMS certification efforts for multiple Medicaid agencies and is experienced in the MECT, Outcomes-Based Certification (OBC), and Streamlined Modular Certification (SMC) approaches. Craig currently leads the MMIS Financial Management module CMS certification effort in Puerto Rico.

Key Qualifications

- ❖ Project Management
- ❖ 15 years of working in State Medicaid agencies
- ❖ Five years' experience supporting Health and Human Services (HHS) agency modernization projects in North Carolina and Puerto Rico
- ❖ Eight years' experience with extensive Medicaid Enterprise Certification Toolkit (MECT) and Outcome-Based Certification (OBC) from assisting State Medicaid Agencies (SMAs) with three successful MMIS and MES CMS certification efforts
- ❖ Certified Project Management Professional®
- ❖ Certified Six Sigma Green Belt

Relevant Experience

BerryDunn (03/2023 to present)

Craig serves as a Certification Lead and PgMO Sr. Business Analyst. He leads the certification effort for Puerto Rico's MMIS Financial Management module implementation. Craig provides leadership and business analysis services responsible for working with the project team client and vendor stakeholders to achieve various project objectives including, but not limited to: Streamlined Modular Certification, MMIS, and Program Management Office support.

Craig Cameron & Associates, LLC (05/2018 to present)

Craig served as a project manager/MES Certification lead. He managed the certification team in MECL, OBC, and SMC certification processes to help ensure receipt of CMS federal funding for the State Medicaid Enterprise System (MES) replacement project. Craig created CMS Certification training material for all stakeholders and conducted the training sessions, and he was a key contributor to the funding request documentation (APD) specifying Business Outcomes and Performance metrics for each module to help ensure approval of federal funding. He also contributed and reviewed all Project RFPs prior to submission for State and CMS approval. He was a CMS Certification SME for the business owner, vendors, and the PMO team to provide certification guidance across all stakeholders (MECT, OBC, SMC). Craig facilitated mapping sessions for SMC outcomes and the system requirements to help ensure certification evidence traceability, and he also managed the development of outcome metrics with system vendors to help ensure the delivery of

the Operational Workbook. He was a MITA SME on the PMO team to provide directions in completing the MITA SS-A and documents, and he facilitated and led the State team through the Operational Readiness Reviews and Certification Reviews with CMS/MITRE. Craig led one of the first piloted Outcomes-Based Certification (OBC) processes with CMS/MITRE and certified one of the first Encounter Processing System (EPS) modules with the Streamlined Modular Certification (SMC) process.

IT Division NC DHHS (06/2015 to 05/2018)

As a project manager/contract lead, Craig managed and administered the contracts for the $513M Replacement NCMMIS system (NCTracks) and the $74M R&A system (NCAnalytics). He established RFP compliance audits in monitoring/auditing of 200+ Service Level Agreements, which provided the State with significant retainage savings. Craig managed a staff of Business Systems Analysts performing service and vendor management functions. He was the final signatory authority for Change Management process as well as Project deliverables and was a subject matter expert for Medicaid Transformation and Medicaid Enterprise System projects.

NC DHHS (04/2013 to 06/2015)

Craig worked as an IT manager and acting assistant program manager. He managed Fiscal Agent during Replacement MMIS Early Operation's phase and was responsible for managing the State's Operations teams' post system implementation through CMS Certification. The teams consisted of Training, Testing, Communications, Provider, and Managed Care. Craig provided leadership as liaison between State business owners and the IV&V vendor leading up to CMS certification, and he also served as CMS on-site Point of Contact as a member of NCTracks Certification Team; CMS certified NCTracks, which brought $19 million of enhanced funding to the State of NC.

Office of NCTracks NC DHHS (05/2012 to 04/2013)

As a business systems analyst, Craig performed oversight of Fiscal Agent requirements in adherence to the RFP, and he also reviewed Fiscal Agent Operations manuals for business rules compliance. He provided change management analysis to Fiscal Agent and business stakeholders, analyzed Fiscal Agent self-reporting of contractual SLAs, and provided recommended solutions. Craig reviewed project Technical Design documents, FA Operations manuals, and System Integration Testing documents.

Computer Sciences Corp. (CSC) (04/2009 to 05/2012)

Craig served as an operations supervisor and supervised 19 employees in the call center, mail room, document prep, and scanning departments in support of the Replacement MMIS contract with the NC DHHS. He was responsible for drafting Operations Procedures to comply with State Business Rules and SLAs, and he was the key speaker at provider seminars to over 400 potential CABHA providers throughout the State. Craig was an Operations Subject Matter Expert to the DDI Build teams for the Replacement MMIS System.

NC DHHS (09/2007 to 04/2009)

As a provider credentialing and enrollment specialist, Craig handled a high volume of telephone inquiries from Medicaid providers seeking enrollment and credentialing information as well as application status. He processed provider applications for Medicaid enrollment checking for completeness and accuracy and verification of required licensure and credentials for participation. He also processed all requested provider file changes related to site locations, licensure updates, and provider affiliations according to State policy and requirements.

Emily Richards, MA, Prosci® CCP
Business Lead, HIE
Subject Matter Expert, HIE PgMO

BerryDunn

Years of Applicable Experience: 11

Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

MA, International Commerce and Policy, George Mason University

BA, Political Science, West Virginia University

Prosci® Certified Change Management Practitioner

Emily is a senior consultant in BerryDunn's State Government Practice Group and brings extensive experience working in state government health and human services (HHS) operations. Emily is an innovative leader and change agent, with demonstrated success leveraging public, private-sector, and non-profit experience to strengthen organizations by marrying systems thinking with organizational change, project management, and health information technology expertise.

Key Qualifications

- ❖ Over 10 years at a state's Agency of Human Services in leadership roles, including six years as Director of the state's HIE Program
- ❖ Seven years as the HIE Program Director, accountable for Medicaid related program operations including, but not limited to, IAPD and cost allocation proposals and Medicaid HIE strategic planning
- ❖ Over 10 years of project, program, and change management experience
- ❖ Former director of the state of Vermont's Health Information Exchange (HIE) Program
- ❖ Successful experience leading and implementing complex multiyear technology projects
- ❖ Deep HHS and organizational change management experience
- ❖ Strong experience working with, and deep understanding of, health information systems and operational management
- ❖ Established the Change Management practice at Vermont's Agency of Human Services

Relevant Experience

BerryDunn (07/2022 to present)

Puerto Rico Department of Health (PRDoH) – *Health Information Technology (HIT)/HIE Support Services (07/2022 to present).*
Emily is serving as the program manager for this project to assist PRDoH with planning and implementation of an HIE.

Vermont Agency of Human Services (2012 to 2022)

- ✓ *Director, Health Information Exchange Program (2016 to 2022).*
  As director of Vermont's HIE program, Emily transformed an underperforming department and instilled trust through diligent, accountable action. In this capacity, Emily prompted essential legislative action that updated consent to share health records policy and removed barriers to achieve data exchange goals statewide. She led a large multiyear project to develop the State's centralized healthcare data management architecture to embolden healthcare decision-making, optimize healthcare operations, and advance value-based care. Additionally, Emily established and led the cross-sector health IT governance structure including the HIE steering committee legislatively mandated to develop an annual strategic plan that guides statewide health IT planning and investment. In this role, Emily negotiated, secured, and managed millions in federal and state investment to sustain health IT and support transformational change and healthcare advancement; led successful certification of Vermont's HIE, ensuring sustained Medicaid funding; served as advisory council member of the National Association for Health IT State Leaders; and managed the Agency's HIE Unit, which included direct reports and matrixed staff.

- ✓ *Director, Organizational Change Management, Medicaid Enterprise (2014 to 2016).*
  In this role, Emily constructed business plans and built the program from inception to support execution of healthcare IT initiatives for various statewide Medicaid and HHS programs. She designed and delivered individual assessments and consultations, customized training plans and sessions, designed intensive workshops based on organizational structure, best practices, employee needs, compliance, and quality management. Additionally, Emily served as advisor to project teams and liaised with all organizational levels to support user engagement and adoption of business practices in the modernization of healthcare. She also developed and orchestrated events for 200+ staff to help enhance engagement and buy-in of the organizational shift.

- ✓ *Education & Outreach Director, Vermont Health Connect (2012 to 2014).*
  In this role, Emily oversaw project planning and execution of a multi-faceted, multiyear state health insurance enrollment campaign that resulted in a reduction of Vermont's uninsured population. She led a team of four reports in the training and support of hundreds of grantees conducting outreach and enrollment.

ICF International

As program analyst, Emily collaborated with the CDC, FEMA, and other federal entities to conduct qualitative research and provide tools for public health campaigns, with a focus on marketing, community engagement, technology integration, and communications.

Volunteer Fairfax

As emergency response program manager, Emily developed and facilitated emergency preparedness trainings and implemented a volunteer mobilization initiative.

Hilary Foster Moles, RN, BSN, Prosci® CCP
Business Lead, PERM

BerryDunn

Hilary, a registered nurse, is a senior consultant in BerryDunn's Medicaid Practice Group with extensive clinical and state agency policy development and analysis experience. She has five years of Payment Error Rate Measurement (PERM) experience, providing support and project management to both Puerto Rico Medicaid Program (PRMP) and West Virginia. Hilary has also been providing Public Health Emergency (PHE) related support to West Virginia and the State of Washington. She brings expertise in case management, Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) claims processing.

Years of Applicable Experience: 10
Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

BSN, West Virginia Institute of Technology

MLC Certified Medicaid Professional (MCMP-II)

Prosci® Certified Change Management Practitioner

Key Qualifications

- ❖ Five years' providing PERM support to West Virginia and Puerto Rico
- ❖ Five years' providing SME, project management, and program oversight for the West Virginia PERM Project
- ❖ Six months serving as project management supporting the Puerto Rico Pilot PERM review
- ❖ 14 years of experience as a RN
- ❖ 10 years of Medicaid-related experience
- ❖ Prosci® Certified Change Practitioner

Relevant Experience

BerryDunn (04/2019 to present)

Hilary serves as part of BerryDunn's Medicaid Practice Group, working with the West Virginia BMS on program management initiatives, PRMP with PERM project management services, and Washington State Health Care Authority (HCA) with PHE support.

Washington State Health Care Authority (HCA) – *Public Health Emergency (PHE) Unwind Project (03/2023 to present).*

Hilary is providing support and subject matter expertise (SME) to the Washington State HCA PHE unwinding project.

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control Services (EOMC) project (02/2023 to present).*

Hilary is providing project management services to PRMP as the PERM lead for PRMP's pilot PERM review, working closely to help ensure and guide the team through the requirements and expectations. This project includes both project management and subject matter expertise (SME) throughout the pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for PRMP, and supporting the Medicaid Eligibility Quality Control (MEQC) portion of the PERM review.

West Virginia Bureau for Medical Services (BMS)

- ✓ *Public Health Emergency (PHE) Support Project (10/2021 to present).*
  Hilary is serving as the project manager for the PHE Support project to assist West Virginia with the preparing and planning and unwinding activities once the PHE ends. This project includes tracking program flexibilities, assisting with the development of processes and initiatives to roll back current efforts, and supporting all PHE-related activities. Hilary is managing budgets and project deliverables and works closely with the client to help ensure the team meets the project requirements and expectations.

- ✓ *Payment Error Rate Measurement (PERM) Project (04/2019 to present).*
  Hilary is currently providing oversight as program manager of the PERM project. She began the PERM project as a subject matter expert (SME) before transitioning to project manager. Hilary is managing budgets and project deliverables and working closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes support throughout all pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for West Virginia, and supporting the Medicaid Eligibility Quality Control (MEQC) portion of the PERM review.

- ✓ *MMIS Fee Schedule and Edit Quality Review (04/2019 to 04/2023).*
  Prior to serving as program manager, Hilary served as a project SME completing analyses of the MMIS configuration of Medicaid benefits and prior authorization requirements in comparison to Medicaid policy. She completed an analysis of telehealth policies to identify opportunities to expand telehealth coverage for West Virginia. She has collaborated with BMS and Gainwell to evaluate claim edits to help ensure the MMIS setup and current processes comply with Medicaid policy and national standards.

- ✓ *State Plan Review and Support (SPRS) Project (09/2020 to 01/2021).*
  As a business analyst, Hilary worked with the project team to analyze the West Virginia Medicaid State Plan and assist the State to make process and document improvements for long-term policy compliance and sustainability.

- ✓ *COVID-19 Emergency Services Sub-Project (03/2020 to 10/2020).*
  Hilary supported the project with tracking of federal waivers, WV Disaster Relief State Plan Amendments (SPAs), and other COVID-19 related legislative policy changes. Hilary researched and advised the client of other state policy implementations daily. She attended weekly Centers for Medicare and Medicaid (CMS) stakeholder calls and advised the client of noteworthy changes to help them stay current with the evolving changes during the public health emergency.

Kepro (09/2015 to 03/2019)

As the care coordinator lead and case manager, Hilary assisted in the development of local medical policies for West Virginia Medicaid. She conducted training sessions to colleagues, providers, and physicians; provided case management to West Virginia Medicaid members; and utilized InterQual and BMS criteria to determine medical necessity. Disciplines included hospice, home health, rehabilitation, and durable medical equipment, among others.

West Virginia Medical Institute (02/2013 to 08/2015)

As a utilization review nurse, Hilary used InterQual and BMS criteria to determine medical necessity. Disciplines included acute care, imaging, hospice, and home health.

Charleston Area Medical Center (06/2009 to 02/2013)

With Charleston Area Medical Center, Hilary served as a nurse and as a Level 2 Clinical Nurse on the Labor and Delivery unit and the Surgical Intensive Care Unit.

Jean Beaty, M.Ed
Business Lead, MMIS PgMO
Subject Matter Expert, MMIS PgMO

Years of Applicable Experience: 18

Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

Master of Education, Vanderbilt University

Bachelor of Arts, Union College

With over 16 years in healthcare experience, Jean has experience in managing teams implementing and operating MMIS, gathering, analyzing, and implementing functional and technical requirements, including creating integrated test plans. She has expansive experience in interface design and testing, including identifying data quality issues and helping resolve data governance issues. She has over 18 years of assessment, request for proposal (RFP), and technical design experience, including contract negotiation and management. Jean has worked on the MMIS in Alaska, Iowa, Maine, Mississippi, Montana, New Hampshire, New Jersey, Puerto Rico, and West Virginia. She is currently supporting the Puerto Rico Medicaid Program (PRMP) in attaining CMS certification for Phase III of Puerto Rico's MMIS and supporting the Puerto Rico Management Office in relationship to all phases of the MMIS.

Key Qualifications

- ❖ Over 18 years of assessment, RFP, and design experience
- ❖ Over 16 years of healthcare experience
- ❖ Experience with CMS certification and vendor management
- ❖ Knowledgeable of the Medicaid Information Technology Architecture framework, CMS expectations for certification, and MMIS business and technical processes
- ❖ 14 years' experience working with SMAs supporting MMIS functionality, including five years as a manager for operations and four years managing new implementations
- ❖ Four years supporting PR as a technical lead and SME for MEDITI3G and as a MMIS SME; nearly three years supporting New Jersey, which has 2.2 million members, as manager and SME for interfaces, reports, and conversion; one year supporting Mississippi, with three million members, as a claims provider and TPL SME

Relevant Experience

BerryDunn (February 2022 to present)

Jean serves as a senior consultant supporting PRMP and the Program Management Office (PgMO) in monitoring the Medicaid Management Information System (MMIS). Jean tracks projects, risks, and issues for MMIS operations, Provider operations, Case Tracking operations, and the Phase III implementation. Jean coordinates tracking of Key Performance Indicators (KPIs), Service Level Agreements, (SLAs), and metrics across the MMIS modules. Jean coordinates with other analysts and consultants working on MMIS projects and subprojects to help ensure consistent open communication across the projects. She also assists as needed in analyzing statements of work, relevant federal regulations, and other documentation to help determine how changes may likely impact the MMIS. In addition, Jean supports PRMP in attaining Centers for Medicare and Medicaid Services (CMS) certification for Phase III of the MMIS, Puerto Rico's financial module, by assisting in identifying and tracking evidence and metrics, preparing presentations, and managing the certification schedule to the overall project schedule. She previously supported PRMP in obtaining certification for MEDITI3G, Puerto Rico's eligibility and enrollment system, by gathering and tracking evidence for the conditions for enhanced funding and by rewriting the Certification Management Plan based on updates from CMS. Jean identified updates required to the citizen's portal user interface that are required by CMS to gain approval of PRMP's online application, and she analyzed

reports produced for certification. Jean completed the Member Enrollment Research and Analysis subproject as requested by PRMP and assisted in the analysis and recommendations for spenddown policy.

IntervoicePR (2020 to 2022)

Jean served as a technical deputy for Project Management Office (PMO) and MEDITI3G. She established project management methodologies, managed cross-functional multi-vendor teams and facilitated gathering, developing, testing, and implementation of system requirements. She coordinated with others to develop a cut-over plan for MEDITI3G that included cooperation from various vendors. Jean led the teams responsible for system conversion and implementation of federal and local interfaces. Jean framed business problems and solutions appropriately for all audiences. She managed priorities across the project, communicating with stakeholders when project priorities changed. Jean wrote RFPs for the Enterprise Content Management system and was responsible for revision and review of project deliverables including System Operations Plan, Performance Management Plan, and Change Management Plan.

Conduent Healthcare, Inc. (2018 to 2020)

As the system manager for Alaska's MMIS, Jean oversaw the analysis, design, development, and implementation of major projects, change requests, and defect fixes. Under her leadership, her team reduced the defect count from 169 to fewer than 40 in one year. She coordinated the design and early implementation of a tech stack upgrade, moving Alaska's MMIS from an unsupported IBM® stack for 18 environments to 11 environments on Conduent Virtual Machines (cloud-based architecture) with the latest IBM®, Cognos, and Oracle software, reducing costs over time. Jean was responsible for estimating costs for all new Alaska MMIS system work and negotiated to extend the State of Alaska's MMIS contract by three years, clarifying issues between the State and Conduent's technology team and driving the technology team to provide rapid response for negotiators. Jean supervised software upgrades for COTS products, including Edifecs, DocFinity, Cognos, Oracle, MQ, and ITIM/ITAM, working with the client and vendors to minimally impact production and lower environments. She was also accountable for delivering all system projects on time and within budget for the State of Alaska's MMIS. Jean identified and delivered new project proposals, including a new provider module and an upgraded Service Authorization module, and collaborated with stakeholders, including multiple vendors, to address management issues and priorities. Her efforts led teams to investigate root causes to project issues and propose effective solutions. Jean coordinated with other CR board members to prioritize CRs and defects and mentored Subject Matter Experts (SMEs) to better analyze issues and recommend solutions that met the client's needs and desired functionality. Finally, she contributed to MMIS proposal team and Red Team proposal reviews.

Molina Healthcare, Inc. (2013 to 2018)

As an application development and architecture manager, Jean was responsible for oversight of the analysis, design, development, and implementation of non-standard interfaces and conversions for New Jersey's DDI, including eligibility, Medicare Buy-In, claims, finance, prior authorization, and TPL. She identified data quality issues with conversion and worked with senior leadership to resolve data governance issues. She led requirements traceability efforts for conversion and the interface team and identified evidentiary artifacts, contributing to certification efforts. Jean worked with the Change Control Board members to prioritize CRs and determine targeted release. She managed conversion and cut-over efforts, converting 1.8 billion claims from the legacy mainframe system to the new MMIS solution. Jean collaborated with stakeholders to address management issues and priorities and contributed to project strategy and deliverable planning, producing the Conversion, Interface, and Cut-Over Plans.

During her tenure with Molina, Jean also served as a business architect. In this position, she led the West Virginia T-MSIS project, coordinating work with CMS and the state client, and supervised, evaluated, and mentored 10 interface and report data engineers across four state contracts. She also led analysts in designing and writing test cases for the West Virginia MMIS implementation. Jean managed the internal baselining project, which created base-lined versions of code and documentation. She taught new interface analysts how to map and test interfaces and how to communicate effectively with Extract, Transform, Load (ETL) developers. She developed and presented a solution for meeting audit requirements using COTS products, including APEXSQL.

Xerox State Healthcare (2007 to 2013)

Jean served as the Third-Party Liability (TPL) project lead for the Montana implementation. She was responsible for analyzing client business processes and requirements and evaluated the impact of requirements on the product. She also analyzed and documented Electronic Data Interchange (EDI) requirements, including the 270/271 and 837/835 transactions sets. Jean developed end-to-end solutions with cross-functional, multi-vendor teams, including member, claims, and financial. She also delivered concise functional and technical design documentation and supported the certification team in identifying appropriate artifacts. Jean oversaw the design and development for new requirements by explaining requirements to offshore developers.

Jean also served as a SWAT business analyst, or an analyst who quickly identified and analyzed requirements for high priority changes and defects, and then led the development and testing. The SWAT team met Mississippi's goal to reduce the average time responding to change requests or fixing defects by 50%. As the lead analyst, she also delivered concise design and testing documentation.

As a senior analyst and test lead, Jean managed a team of over 40 testers, implemented integrated test plan for the Automatic Response System, TPL, Security, and Global Services. She evaluated 835/837 and 270/271 EDI X12 transaction processes and collaborated to develop a solution for 5010. Jean analyzed data needs and requirements from customers and delivered concise functional and technical design documentation and effectively collaborated with the state client to identify and meet requirements. Jean composed testing and change control process documentation, contributed to the MMIS proposal team, and provided Red Team proposal review.

Georgia Department of Education (2011 to 2012)

As a Race to the Top program manager, Jean created technical specifications and wrote RFPs for an education testing system, test item bank, and professional development. She also mentored and trained staff in writing RFPs, created quality assessments and Georgia contract procedures.

Measured Progress, Inc. (2005 to 2007)

Jean served as a test developer where she composed, edited, and managed production of quality multiple choice and open response items for state assessments. She analyzed texts to determine the best methods of addressing state standards. Jean collaborated with various stakeholders, gathering testing requirements, and selecting passages and test items, constructed assessment frameworks, and drafted proficiency descriptions and standards. Jean also coordinated with statisticians to build assessments aligned with state expectations.

Joy Prenger
Business Lead, APD

Years of Applicable Experience: 30
Years of Relevant Experience Supporting PRDoH & PRMP: 3
Education and Certifications

BS, Accounting, Columbia College

State of Missouri Certified Project Manager

Joy is a senior consultant in BerryDunn's Medicaid Practice Group. Specific to Medicaid, Joy specializes in MES modernization, data management and analytics, finance, budgeting, and contract management, and APD development and funding requests. Joy brings 25 years of leadership experience at the Missouri Department of Transportation (MoDOT) and Medicaid agencies, and she is well versed in government processes, organizational structure, budget management, business plans and strategies, and procurement.

Key Qualifications

- ❖ Five years of experience providing project management, funding and acquisition support services to Health and Human Services (HHS) and State Medicaid Agency (SMA) projects in Puerto Rico, Missouri, and Iowa

- ❖ Five years' experience as business lead and SME, supporting HHS agency projects with APDs, procurements, writing business process documents, performing gap analysis, and System Integration Testing (SIT) and User Acceptance Testing for Program Integrity, Fraud, Waste and Abuse, and Enterprise Data

- ❖ 25 years' leadership experience at the Missouri Department of Transportation; well versed in government processes and organizational structure, budget management, business plans and strategies, and procurement

- ❖ 13 years of experience working with Sage 300 Accounting software for collections and disbursements exceeding $195 million annually

- ❖ Six years serving as a board member for the International Fuel Tax Association Inc. (IFTA), actively participating in the simplification of the administration of motor fuels and use taxation reporting in the United States and Canada

- ❖ Testing experience on complex projects with multiple software solutions, advancing transportation infrastructure for the commercial motor carrier industry

- ❖ Over 10 years of knowledge in program evaluation and review techniques (PERT), performance measurement and strategic planning, customer relationship management (CRM), and financial and logistic solutions

- ❖ Extensive knowledge of statutory and regulatory compliance for state and federal requirements for Medicaid finance and the commercial motor carrier industry

- ❖ 10 years of experience as a Goldschmidt Cancer Center volunteer working in admissions, medical records, information desks, and patient navigation for radiation and infusion treatments

Relevant Experience

BerryDunn (10/2018 to present)

Puerto Rico Medicaid Program (PRMP) *(01/2021 to present).*

Joy is a senior consultant for BerryDunn's team and works hand-in-hand with her program manager, Jason Hargrove, to lead the development, updates to, and tracking of Advance Planning Documents (APDs) and Medicaid Detailed Budget Table (MDBT) files as well as updates to federal guidance. In this role, Joy is primarily responsible for the APD financials, including expenditures, and assists with the APD narratives. Additionally, she currently supports the quarterly MMIS KPI dashboard and helps with data analysis. Since the start of Joy's tenure supporting PRMP, she has helped with the MMIS Phase III procurement, supported the RedMane SLA subproject, and developed multiple plan aids and supporting documents for the PgMO service area.

Iowa Department of Human Services (DHS) Medicaid Procurement of Acquisition Support Services *(04/2022 to present).*

Joy is a senior consultant for BerryDunn's team assisting DHS with modernization and procurement acquisition support services, including visioning, researching, planning, and developing solicitations. In this role, Joy helps draft APD materials, prepares minutes for biweekly CMS meetings, assists with solicitations, strategic planning, monthly CMS reports, and vendor onboarding.

Additionally, Joy developed a Vendor Engagement Plan, analyzed the NASPO Provider Management Solution master agreement, business and technical requirements, and performed a cost analysis. Additionally, she assisted in the development of a Provider Management participating addendum and task orders, supported the development of a Pharmacy RFP, and assisted in the development of outcomes-based performance measures and metrics.

Missouri Department of Social Services *(11/2018 to 10/2022).*

Joy served as a business analyst, lead, and senior consultant supporting various projects for Program Integrity, Fraud, Waste and Abuse, Enterprise Data Warehouse, and Electronic Visit Verification. She provided subject matter expertise, capturing supporting evidence for certification checklists in support of CMS certification reviews; serving as SIT and UAT test lead; supporting and resolving technical inquiries of the team and guiding them in the delivery of properly executed test cases; and developing test execution metrics and defect management.

Missouri Department of Transportation (11/1992 to 07/2018)

Joy led and oversaw the collection and distribution of daily accounts receivable and accounts payable activities in excess of $195 million annually for IFTA, International Registration Plan (IRP), Unified Carrier Registration (UCR), Operating Authority (OPA), Oversize – Overweight (OS/OW), and Safety and Compliance. She researched, performed tests and monitored system issues for numerous customer transactions to help ensure credential issuance, revenue recognition, and adaptation to changing regulatory environments. In addition, she developed and enforced financial, international, national, and state motor fuel tax and apportioned registration policies and procedures for the division; worked with internal and external auditors and program compliance review teams to provide guidance, ongoing monitoring, and evaluation of programs to help ensure compliance; and delegated authority to vote, respond, and review ballot proposals for IFTA and the IRP that regulate commercial motor vehicle and safety business practices.

Khrista Eades, MBA
Business Lead, MITA SS-A

Years of Applicable Experience: 10

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

Master of Business Administration, Ohio Dominican University

BS, Business, Emphasis in Management, Ohio Dominican University

Lean Six Sigma Black Belt

Project Management Boot Camp/Project Management Theory, Ohio Dominican University

Khrista was the MITA project manager for the State of Ohio for over four years. She served as a leader within the Ohio Department of Medicaid (ODM) to aid in the growth and development of MITA maturity throughout the Medicaid Enterprise. She managed the completion of ODM's MITA 3.0 State Self-Assessment (SS-A) for continued Federal Funding Participation (FFP) eligibility, and she managed the Medicare and Medicaid Services (CMS) Software Development Life Cycle (SDLC) Gate Reviews for Ohio Medicaid systems certification. Her responsibilities included developing a governance model that complements ODM and includes a baseline of key elements that are required for project governance based on Medicaid projects' scope, timeline, complexity, risk, stakeholders' and departmental priorities. Khrista developed and implemented a new Medicaid Enterprise business and IT workflow that increases the agency's interoperability capabilities across other State of Ohio agencies and the nation. She developed and implemented a new Medicaid PMO Governance and Standards Strategy and Framework to support the clarity and consistency of decision-making capabilities for Medicaid policy and operations leadership. Khrista served on various Health and Human Services (HHS) taskforces spanning across all Ohio state agencies.

Key Qualifications

❖ Over 10 years of MITA and Medicaid experience

❖ Seven years' experience with Ohio Office of Health Transformation

❖ Over 30 years' experience with various Health and Human Services (HHS) programs, including Medicaid, child support, internal auditing, IT project management, and communications

❖ Over five years' experience as MITA project manager for the State of Ohio Department of Medicaid (ODM)

❖ Program Manager for PRMP MITA SS-A (2021-2023)

❖ Over five years' experience as a project manager within the ODM PgMO leading Ohio's E&E (Ohio Benefits) system gate reviews during CMS certification and deployment of ODM's PgMO governance structure

❖ Governance project manager for Ohio Medicaid Department

❖ Certified Six Sigma Lean professional

Relevant Experience

BerryDunn (02/2021 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (02/2021 to present).*

(2021-2023) Deputy Program Manager for the PRMP Enterprise Objective Monitoring and Control (EOMC) Services Engagement.

✓ Providing program planning, management and oversight of staff, services, deliverables, and artifacts; responsible for meeting with EOMC project leads to address project status, issues, risks, and/or open discussions

✓ Meeting with program sponsors and key client personnel to manage project/program status and provide resolution of issues and mitigation of risks relating to contracted services

- ✓ Managing and providing leadership oversight of strategic planning and procurement activities to help enhance the client's ability to plan and procure its MES projects in alignment with their short- and long-term business goals and objectives; primary management and oversight for the following EOMC Service Areas:
  - ➢ MITA State Self-Assessments (SS-A)
  - ➢ Integrated Medicaid Enterprise System (MES) Program Management Support
  - ➢ Outcomes-Based Procurement Support
  - ➢ APD Support

(2020-2023) MITA SS-A and Roadmap Support Project Management.
Assisting client with its goals related to maturing the Medicaid Enterprise by managing annual performance of its MITA SS-A; primary activities are as follows:

- ✓ Working with internal and external stakeholders to update previous MITA SS-A documents including the MES Roadmap, Data Management, and Technical Management Strategies
- ✓ Developing a new MITA approach that aligns to CMS guidance released in April 2022 as part of the CMS Streamlined Modular Certification (SMC)
- ✓ Developing a MITA outcomes matrix to replace the MITA Maturity Matrix (MMM) to assess MES projects based on outcomes versus automated maturity scoring (1-5) to determine their MES maturity level through the following outcomes-based assessments:
  - ➢ Determining current operational problems and risks, challenges, and limitations of the existing systems or modules
  - ➢ Identifying Medicaid program goals that may be impacted by the existing systems or modules and their limitations
  - ➢ Defining what success looks like in the to-be environment and how it will be measured and monitored throughout the life cycle of MES system solutions

(2022-2023) Integrated MES (IMES) Program Management Support Project/Program Management.
Project/program manager for the delivery of program performance and management support to help the client achieve its MES vision, goals, and objectives through the following activities:

- ✓ Developing an Outcomes Management Plan to identify target results for the MES program and help measure desired program outcomes
- ✓ Development of an MES Program Performance Dashboard detailing enterprise-wide metrics related to business operations, key enterprise project updates and status, KPIs and metrics, and vendor SLAs
- ✓ MES Project Intake and Analysis support to help ensure future MES investments provide value to the client as new modular components become necessary for the expansion of its current MES
- ✓ Program Management Office BA/SME Support to assist with tracking and monitoring requirements throughout MMIS design, develop, and implementation phases
- ✓ Medicaid Enterprise Governance Framework and establishment of a Program Management Office (PgMO) for the management and oversight of all Medicaid Enterprise IT system projects and enhancements

Ohio Department of Medicaid (ODM) (2012 to 12/2020)

PMO Governance and Standards (2018 to 12/2020)
Khrista was a project manager with Ohio's largest healthcare payer with a network of 135,00 active providers and a $29B annual budget. She created a new governance and standards area within the ODM Project Manager Office (PMO). Her responsibilities included training and managing the adoption of the State of Ohio's Project and Portfolio Management Practice (PPMP), managing the deployment of Workfront Project Management Tools, and developing an information technology (IT) solution for the ODM director to actively monitor and track all program work associated with all Medicaid projects and SFY 20/21 budget initiatives. Other job duties included supervising ODM project managers, vendors, and business analysts on various ad hoc Medicaid IT Projects and other program initiatives and supporting CMS efforts related to State Technical Assistance Group, All-State Cohort, and CMS MMIS Cohort Meeting.

Her contributions included the development of a new ODM Project Portfolio Management (PPM) automated solution to replace a manual Excel spreadsheet tracking and monitoring tool for all ODM projects and budget initiatives as well as

oversight of project management efforts for the timely deployment of the Incident Management System (IMS) and Home Choice systems.

MITA Project Manager (2014 to 2018)

Khrista served as the project manager for the MITA 3.0 State Self-Assessment (SS-A), including Request for Proposal (RFP) development and procurement of an automated tracking system to align all ODM business, information, and technical business processes with Federal Financial Participation (FFP) eligibility requirements. She collaborated with key department personnel and executive leaders to build and implement an internal MITA process to support new project decisions based on the potential impacts to Medicaid's IT/business enterprise; supported all MMIS modular system project teams during CMS system certifications; managed the development of the PMO program management plan (PMP); and implemented the new Department of Administrative Services (DAS) PMP practice; and managed both on-sight and remote SS-A project team members that report to the ODM PMO director and executive leadership.

Khrista replaced a stand-alone system with existing technology offered through DAS in tracking and maintaining ODM's MITA profile scores; created surveys to improve timeliness and staff efforts related to gathering and tracking over 1200 separate MITA business process criteria; worked with ODM executives to set MITA maturity levels prior to workgroups, saving the department time and money in subject matter expert (SME) resource utilization.

Health System Administrator (2012 to 2014)

Khrista maintained a wide scope of responsibilities in the development of a thorough Integrated Eligibility (Ohio Benefits) system for Ohio Medicaid and other health and human services programs. She wrote, edited, and tracked system requirements documentation, system change requests, enhancements, and overrides; managed the Final Design and Development (FDD) and Operational Readiness Review (ORR) gate reviews for the Ohio Benefits system as required for continued federal funding and system certification; provided support during the writing, editing, and gathering of information for processing and approval of the Ohio Benefits system Advanced Planning Documents (APD)s, which procured 90% Federal Financial Participation (FFP) and coordinated the release of Ohio Benefits project.

Governor's Office of Health Transformation (OHT) (2010 to 2012)

As a communications program administrator, Khrista supported the OHT communication and legislative director in day-to-day operations and website development; managed OHT electronic messaging distribution; managed all page edits and file uploads to OHT Website; participated on governor-sponsored initiatives including Employment First, Early Childhood Education, and Human Trafficking; performed market research and analysis on projected Affordable Care Act (ACA) legislation impacts to Ohio's healthcare industry; and provided logistical management of external stakeholder meetings including scheduling, agenda development, facilitation, minutes, tracking, and action item follow-up.

Kirsten Saunders
Business Lead, OCM

Years of Applicable Experience: 4
Education and Certifications

Bachelor of Science in Industrial & Organizational Psychology, Capella University

Associates of Science in Administrative Medical Assisting, Ultimate Medical Academy

Prosci® Certified Change Practitioner

Kirsten has 20 years' experience running enterprise-wise change programs and leading large-scale, Agile/Agile-Hybrid, and process improvement projects. She is adept at establishing quality and financial operational standards to produce positive impact on overall performance of the organization. She has excellent leadership and people management abilities as demonstrated by a history of building and mentoring top performing teams (upward of $400M book of business) and passionately motivating staff towards constant improvement.

Key Qualifications

- ❖ Over 20 years of team leadership and development experience, leading teams upwards of 250 (direct/indirect reports), inclusive of healthcare and operational change
- ❖ Over 20 years of experience in running enterprise-wide change programs and leading large-scale, agile-hybrid, process improvement initiatives
- ❖ 12 years in the healthcare / human services industry, including Medicaid, Medicare, VA, and commercial programs, and MES

Relevant Experience

BerryDunn (10/2023 to present)

Kirsten is a subject matter expert in OCM and Organizational Development for BerryDunn's Medicaid Practice Group's Organizational Excellence Practice.

SCA Health (03/2022 to 10/2023)

As an organizational change management leader, Kirsten led department and develop team of change consultants to implement strategies and plans that maximized employee and stakeholder adoption and usage of required changes. She developed and executed change management plans to meet strategic and operational goals, helping ensure clearly defined dependencies, risks, and critical paths were carefully considered as part of the planning process. She collaborated effectively across Senior Leadership, HR, Culture, and other key functional partners to assess change management needs, and she developed strategic recommendations to address critical change management areas of focus.

Cerner Corporation (04/2020 to 03/2022)

Kirsten served as the Organizational Change Engagement Owner/Director. She created and implemented change management strategies (ADKAR) and plans that maximize adoption, minimize resistance, and meet project objectives. She built strategies to support adoption of the changes required by $26B Veterans Affairs, Electronic Health Record Modernization initiative, while supporting the design and developing of organizational communications. Kirsten provided direct support and coaching for managers by conducting analyses, assessing change readiness, and identifying key stakeholders. She was also responsible for overall change management delivery at the VA facility level, to include oversight of Organizational Change Consultants.

U.S. Bank (05/2018 to 04/2020)

Kirsten was responsible for the leadership and development of the North America, Operations Change Management team. She worked to identify, design, develop, and implement requirements/tasks needed for the Operations business line in alignment with greater than $30M in projects (Agile & Waterfall) and/or process changes. She interacted with internal and external partners to help ensure successful and timely completion of identified Change opportunities.

Aetna (05/2017 to 05/2018)

As the senior operations manager, Kirsten was responsible for overall direction and leadership of the Southeast Account Management team ($140M book of business with a 91% retention rate). She managed direct reports in multiple locations and was accountable for exceeding performance goals, especially in the areas of quality, client retention, productivity, and call management. Kirsten motivated associates through continual guidance, direction, development, and coaching. She was responsible for performance evaluation/management and compensation administration. She analyzed skill set and knowledge of the team and individuals to determine training requirements and provided continual communication and coordination of functional activities with the Director of Client Service and other Insurance Services departments to help ensure effective client support. Kirsten was responsible for influencing departmental strategy, change management, and managing the daily operations of the department business area by anticipating, guiding development of, and implementing required systems, procedures, and programs.

Anthem (06/2014 to 05/2017)

Kirsten served as the operations process expert and led and directed the [Florida Medicaid] Network Management team in change management, operational process improvement, including conducting in-depth evaluations of workflow and turnaround times, providing recommendations to maximize productivity and increase effective processing. She served as a subject matter expert, applying extensive knowledge of Medicaid legislation and regulations to help ensure compliance with state and government requirements. Kirsten collaborated with CMS, leadership, staff, and providers to deliver training, create job aids, and educational materials to help ensure proficiency and consistency across all programs. She managed all reporting and trend reviews to help ensure that all processes are up to date.

UnitedHealth Group (03/2013 to 06/2014)

As the provider service representative team lead, Kirsten supervised and directed employees while focusing on process improvement and the resolution of complex issues with [Medicare / Senior Supplemental] providers. She focused on responding to claim inquiries, eligibility, covered benefits, billing, authorizations, and other provider requests. Kirsten investigated claim processing and payments errors, collaborating with claim operations to reprocess. She researched and identified trends to develop policy and process improvements that supported the organizational mission for superior customer service and quality improvement.

Kitty Purington, JD
Business Lead, MFP

Years of Applicable Experience: 25+

Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

Fluent in Spanish and English

Juris Doctor, University of Maine School of Law

BA, History and Spanish, University of Massachusetts

Kitty is an experienced Senior Consultant with nearly 30 years of Medicaid experience. She has served in multiple leadership positions in state agencies, national organizations, and community organizations. Kitty has a strong background in Medicaid policy research and analysis, identifying policy solutions to improve care for people with complex needs, developing and implementing programs of national significance, and assisting Medicaid agencies in managing change.

Key Qualifications

- ❖ Over 25 years' experience working on state Medicaid policy related to systems and services for older adults and people with complex conditions
- ❖ Over 10 years working at the National Academy for State Health Policy, providing Medicaid, long-term care, and behavioral health expertise directly to states on a range of subjects
- ❖ Almost three years' experience working for the State of Maine, developing and implementing health home program for individuals with complex needs
- ❖ Understanding of unique features of Puerto Rico Medicaid
- ❖ Systems thinker with practical experience designing and implementing policy and program changes
- ❖ Understanding of state best practices and policy approaches in serving people with complex needs
- ❖ Long history of working with states to improve Medicaid services and systems

Relevant Experience

BerryDunn (05/2022 to Present)

Puerto Rico Medicaid Program – *State Plan (05/2022 to present).*

Kitty serves as a senior consultant on the Puerto Rico State Plan Team. In that role, she leads the team's work on Money Follows the Person, providing support to the Puerto Rico MFP team by developing detailed outlines for the MFP Needs Assessment and NEMT Analysis; drafting initial sections on the MFP Needs Assessment (Section 3.0: Background: LTSS in Puerto Rico and Section 5.0 Workforce), developing the MFP draft survey for providers, families, and people in need of services; providing other expertise to the MFP team on Medicaid, home and community-based services, and other issues as needed.

West Virginia Bureau for Medical Services (BMS)

- ✓ *Certified Community Behavioral Health State Plan Amendment (06/2022 to present).*
  Kitty provides subject matter expertise to BMS in the development of a new SPA to support the CCBHC model.
- ✓ *State Plan Review and Support (SPRS) Project (05/2022 to present).*
  In Phase II of the SPRSP Project, Kitty provides subject matter expertise associated with the Medicaid State Plan. The SPRS Project Team drafts the state plan amendment (SPA) packages, tracks amendments through the review and approval process, supports BMS with the execution of Medicaid Services Fund Advisory Council meetings, and provides ad hoc assistance for State Plan related activities.
- ✓ *Substance Use Disorder (SUD) Waiver Initiative Project (05/2022 to present).*
  Working as a Subject Matter Expert (SME) for Phase IV of the SUD project, Kitty assists in the development of new state plan amendments and supports the state Medicaid agency in developing new policies for its SUD

waiter services.

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

As senior program director, Kitty led the Behavioral Health, Aging, and Disability portfolio for NASHP, a national, non-partisan, mission-driven organization that supports state leaders in their work to improve health policy. She worked with state leaders, private foundations, federal agencies, and partner organizations to develop and implement multiyear projects that focused on delivery system transformation, payment reform, implementation of best practices, and policy innovation. She designed and oversaw technical assistance and learning opportunities that supported state policy makers on a range of topics including Medicaid, behavioral health, long-term care, and value-based payment. Kitty researched, analyzed, and evaluated emerging state and federal health policy issues, oversaw the development and dissemination of briefs, blogs, webinars, and other resources for state Medicaid, behavioral health, and long-term care officials, and she facilitated meetings, webinars, and conference sessions to assist state health officials in problem solving and sharing best practices. She supervised a team of professionals to manage grant development, contracts, budgets, and staffing.

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

Kitty worked as program and policy manager of Value-Based Purchasing (VBP) with the Maine HHS Commissioner's Office and agency leadership to oversee the development, implementation, and ongoing growth and improvement of OMS practice transformation and VBP initiatives. She developed and implemented the state's Health Home regulatory framework (including state plan amendments, Medicaid regulation, provider contracts, licensing and certification related to payment and provider requirements) in collaboration with the OMS Office of Policy and State Attorney General's Office. She also developed and implemented thorough quality and compliance strategies. Kitty worked with the OMS Operations team and external vendors to implement online portal and set of tools for primary care and behavioral health providers to support population-based care coordination, physical and behavioral health integration, panel assignment and management, and quality improvement. She collaborated with internal and external stakeholders (related state agencies, providers, peer leaders, family and advocacy organizations) on program development and implementation; oversaw communications, including production of member materials, provider communications and technical assistance, webinars, and public forums; developed the State Innovation Plan and behavioral health-related initiatives for a successful $30 million CMS State Innovation Model grant; and served as liaison post-award on projects such as HIE connectivity for Behavioral Health Home providers, learning collaboratives, and workforce development. She also developed a concept paper for Maine's Accountable Communities initiative and worked with internal and external stakeholders on total cost of care methodology and quality strategy.

National Academy for State Health Policy (1/2009 to 06/2012)

Kitty worked as a policy specialist to manage NASHP activities and deliverables under a five-year project funded by the Substance Abuse and Mental Health Services Administration that focused on promoting evidence-based practices for adults, older adults, and children with behavioral health needs in state Medicaid programs. She collected and analyzed detailed state policy data related to Assertive Community Treatment, Supportive Housing, Medication Assisted Treatment, and other evidence-based services. She provided technical expertise and analysis on Medicaid and other state policies topics, including behavioral health, VBP, health IT and exchange, data analytics, behavioral health privacy and confidentiality issues, and quality measurement. She also developed materials and facilitated activities to promote state learning objectives.

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

Kitty served as the director of government and business affairs to develop and direct legislative strategy for a large community mental health center. She identified new business opportunities and strategic initiatives for the organization resulting in programs and partnerships on physical and behavioral healthcare integration, school-based health centers, and pre-trial behavioral health supports for correction-involved women. Kitty provided ongoing analysis and information regarding regulatory, reimbursement, and policy changes at federal, state, and local levels.

Maine Association of Mental Health Services (11/2001 to 01/2007)

Kitty served as interim executive director and policy analyst to provide leadership and strategic planning to a board of directors on a variety of issues for statewide provider trade association of mental health and substance use disorder provider organizations, including development of new governance structure and bylaw changes, and planning and implementation of legislative agendas. She worked with state and federal agencies in advocacy, interpretation, and development of rules, legislation, and standards pertinent to reimbursement and delivery of behavioral health services. She represented the Association in a variety of forums, including as chair of the governor's Medicare Part D Implementation Task Force, chair of the state Medicaid Advisory Committee, and member of the Policy Committee of the National Council for Community Behavioral Health.

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

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

National Alliance for the Mentally Ill (10/1993 to 05/1996)

Kitty worked as a managed care policy analyst to analyze Medicaid managed care policies for the state chapter of a national advocacy organization.

Matt Bria, CISSP, PMP®, GSNA, PCI-QSA, Prosci® CCP
Business Lead, Security Assessment Audit

Years of Applicable Experience: 19

Years of Relevant Experience Supporting PRDoH & PRMP: 3

Education and Certifications

BS, Management Information Systems, Salve Regina University

Certified Information Systems Security Professional (CISSP)

Certified Project Management Professional® (PMP®)

GIAC Systems and Network Auditor (GSNA)

Payment Card Industry Qualified Security Assessor (PCI-QSA)

Prosci® Certified Change Practitioner (CCP)

Matt is a senior manager in BerryDunn's Government Assurance Practice Group and leads BerryDunn's IT Security Practice. He leads several of BerryDunn's IT security engagements, including PCI assessments and information security program development. He possesses a strong knowledge and understanding of security analytics, enterprise resource planning security, network and cloud security, security architecture, security governance, risk assessments, and compliance. Matt is a certified Project Management Professional® (PMP®), Certified Information Systems Security Professional (CISSP), GIAC Systems and Network Auditor (GSNA), and PCI-QSA with 19 years of security-related project management experience.

Key Qualifications

- ❖ 10 plus years of experience of develop security programs
- ❖ Seven plus years of leading National Institute of Standards and Technology (NIST) and MARS-E assessments
- ❖ 10 plus years of developing incident response plans and performing tabletop exercises
- ❖ 19 plus years of project management experience

Relevant Experience

BerryDunn (09/2016 to present)

Glynn County, GA – *Independent Security Assessments (ISA) (07/2022 to present).*
Matt was project manager in completing a cybersecurity risk assessment, vulnerability scanning, and penetration testing for the County using the NIST Cyber Security Framework (CSF).

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

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

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

Puerto Rico Medicaid Program (PRMP) – *Independent Security and Privacy Controls Assessment Medicaid Management Information System (MMIS) (06/2020 to 09/2020); MARS-E Assessment Eligibility Enrollment System (11/2020 to 04/2021; 01/2022 to present).*

Matt serves as the project manager and senior security consultant for MMIS NIST based assessment and the annual CMS MARS-E assessment of the PRMP eligibility and enrollment system. In this role, Matt serves as the primary point of contact for PRMP and leads all engagement activities for the MARS-E assessment. Additionally, Matt provides subject matter expertise in assisting PRMP in developing and maturing their security organization and governance structure.

Bangor Savings Bank (BSB) – *PCI Gap Assessment (10/2020 to present).*

Matt is the lead PCI-QSA, completing a PCI gap assessment that includes mapping out BSB's CDE and providing guidance on policies and procedures and design of mobile based rewards funding program to help ensure the security of credit card data.

New Mexico Health Insurance Exchange (NM HIX) – *Independent Security and Privacy Controls Assessment (12/202 to 07/2021; 03/2022 to 08/2022).*

Matt served as the project manager and senior security consultant for the annual CMS MARS-E assessment of the New Mexico Health Insurance Exchange (NM HIX) eligibility and enrollment system. In this role, Matt served as the primary point of contact for the State and led all engagement activities for the MARS-E assessment.

Goodwill Industries of Northern New England – *PCI Assessment (05/2019 to 10/2019; 11/2020 to 04/2021; 04/2022 to 08/2022).*

Matt served as a project manager for the Goodwill Industries of Northern New England. Matt oversaw the PCI assessment that included mapping out of the CDE, provided guidance on policies and procedures, completion of relevant self-assessment questionnaires (SAQs) and an Attestation of Compliance (AOC) at the completion of the assessment using the Payment Card Industry Data Security Standards version 3.2.1.

City of Scottsdale, AZ – *Security Assessment (01/2020 to 05/2020); Wireless Network Assessment (01/2022 to 05/2022).*

Matt served as the project manager and senior security analyst for the City of Scottsdale. In this role, Matt served as the primary point of conduct for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's security posture and wireless network environment.

City of Phoenix, AZ – *Database and Server Security Assessment (06/2019 to 02/2020); IT Asset Management (11/2020 to 05/2021); Water Services Department (11/2021 to 05/2022).*

Matt served as the project manager and senior security analyst for the City of Phoenix. In this role, Matt served the primary point of conduct for the City's audit department for the duration of the project. Additionally, Matt was the senior security analyst, performing analysis of the City's database and server infrastructure, IT asset management, and Water Service Department security assessment.

Missouri Department of Social Services, MO HealthNet Division – *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (09/2021 to 05/2022).*

Matt was the project manager and lead security analyst for a NIST based security and privacy assessment for four systems contained within the Missouri Medicaid Enterprise. These included Individual Assessments, based on NIST 800-53 rev 5, of the Medicaid Management Information System (MMIS); Clinical Management Services and System for Pharmacy Claims and Prior Authorizations (CMSP); Program Integrity Solution (PI); and the Business Intelligence and Enterprise Data Warehouse Solution (BIS-EDW).

Missouri Department of Social Services (DSS) – *Independent Security Assessments (ISAs) for Missouri Eligibility Determination and Enrollment System (MEDES) (01/2017 to 05/2017, 01/2018 to 03/2018, 01/2019 to 04/2019, 01/2022 to 05/2022).*

Matt served as the project manager and senior security consultant for the annual CMS MARS-E assessment of the Missouri Eligibility and Enrollment System (MEDES). In this role, Matt served as the primary point of contact for the State and led all engagement activities for the MARS-E assessment.

Minnesota Information Technology Services – *Independent Security and Privacy Controls Assessment (04/2018 to 06/2018; 03/2019 to 06/2019;01/2020 to 05/2020,01/2021 to 05/2021).*

Matt served as the project manager and senior security consultant for the annual CMS MARS-E assessment of the Minnesota eligibility enrollment system (METS). In this role, Matt served as the primary point of contact for the State and led all engagement activities for the MARS-E assessment.

West Virginia Department of Health and Human Resources (DHHR) – *Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017; 08/2020 to 02/2021).*
Matt served as the project manager and senior security consultant for the West Virginia E&E Independent Security and Privacy Controls Assessment project. The independent assessment was being completed against the CMS MARS-E v2.0 framework.

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

Colorado School of Mines – *PCI Assessment (11/2019 to 11/2020).*
Matt served as the project manager and lead PCI-QSA for a PCI assessment we were conducting for the Colorado School of Mines (Mines). He completed a PCI gap analysis, which included a review of credit card payment channels, point of sales terminals, policies and procedures, and recommending the appropriate SAQ. A SAQ assessment was performed, which resulted in an AOC.

Larimer County, CO – *HIPAA Assessment (10/2018 to 10/2020).*
Matt served as the program manager and senior security consultant for the Larimer County HIPAA assessment. In this role, Matt served as the primary point of contact for the County and senior security consultant.

Indiana Department of Family and Social Service – *Independent Security and Privacy Controls Assessment (03/2019 to 06/2019).*
Matt served as the security analyst for the annual CMS MARS-E assessment of the Indiana eligibility enrollment system.

Pasco County, Florida – *PCI Assessment (10/2018 to 07/2019).*
BerryDunn completed a PCI assessment that included mapping out Pasco County's CDE across multiple county wide departments and payment processes, provided guidance on policies and procedures, completion of relevant SAQ, and an AOC at the completion of the assessment using the PCI Data Security Standards, version 3.2.1.

TBC Corporation (09/2006 to 08/2016)

As the director of IT security, Matt was responsible for all aspects of enterprise-wide security and enterprise production change management for a multi-billion-dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security architecture, identity and access management, intrusion detection and analysis, multi-factor authentication, advanced malware detection, security analytics, forensics, DLP, incident response, and endpoint protection. In addition, Matt was responsible for the implementation of enterprise-wide security metrics and security policies and chaired the executive security steering committee.

Megan Fitzgerald
Business Lead, Spenddown
Business Analyst, PERM and SPA

Years of Applicable Experience: 10

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

BS, Biology, Georgia Southern University

Megan is a self-motivated, passionate, and enthusiastic professional with Medicaid experience spanning more than 10 years, six states, and various healthcare settings. In addition to her work history, Megan is certified through the SSI/SSDI Outreach, Access, and Recovery (SOAR) program and serves two non-profit organizations as a Disability and Medicaid Advocate. Her expertise lies in eligibility, policy, and operations.

Key Qualifications

❖ 10 years' Medicaid Spenddown operations experience and 10 years of Social Security disability and policy experience spanning six states and various healthcare settings

❖ Eight years' experience as business lead and SME support experience, spanning six states and various healthcare settings

❖ Eligibility policy and operations experience in Florida, Georgia, Alabama, South Carolina, North Carolina, Virginia, and Puerto Rico

❖ Two years' experience supporting Puerto Rico with Spenddown project, SPA, and PERM

Relevant Experience

BerryDunn (09/2021 to present)

Megan serves as a senior consultant with BerryDunn's Medicaid Practice Group and is currently leading the Spenddown project in Puerto Rico. She also serves as the eligibility SME for the SPA area, providing support for all eligibility related SPAs and client communications. She is the eligibility lead for the PERM efforts in Puerto Rico and provides SME support for other eligibility related requests received by PRMP. Megan provided support to PRMP in their efforts to design a CMS approved Medicaid application and MAGI verification plan. She led, drafted, and provided SME support for the Eligibility Policy and Procedures Manual in Puerto Rico. Megan continues to provide support to PRMP for manual updates.

Consulate Healthcare (08/2018 to 09/2021)

As a regional Medicaid specialist, Megan was responsible for the oversight and success of the pending Medicaid application process for a group of assigned skilled nursing centers. She assessed the financial risk to the center as it related to non-covered services under the payer contract and/or the ICP Medicaid Application approval process. She also analyzed the status of any payer related issues, provided reports to regional and division teams on findings, and developed action plans to resolve outstanding balances and reduce bad debt impact to the center.

Medassist (A FirstSource Company) (01/2013 to 08/2018)

✓ *Medicaid Eligibility Specialist (09/2016 to 08/2018).*
Megan served as a Medicaid eligibility supervisor for Georgia and Florida, monitoring performance statistics and forecasting revenue projections. She set, evaluated, and achieved departmental objectives as well as identified new business opportunity and upsell Medassist brand to new, current, and potential clients.

✓ *Off-site Field Manager (04/2015 to 09/2016).*
Megan was an off-site field manager with Medassist, assisting on-site Medicaid representatives in identifying and problem solving workflow issues. She also trained new staff on Medicaid processes.

- ✓ *Patient Service Representative (01/2013 to 04/2015).*
  Megan reviewed hospital census to identify self-pay patients; interviewed and determined their eligibility for local, state, and federal healthcare coverage to include Medicaid, Medicare, SSI/SSDI, Victims Compensation, etc.; identified specific patient needs and directed them to the appropriate agency; and initiated and submitted applications for various government healthcare programs.

Ryan Wrisley, MHCDS, PMP®
Business Lead, EDW
Subject Matter Expert, EDW PgMO

Ryan is an experienced project manager, with a unique blend of business and technical experience through his IT strategic planning and requirements development work with state agencies and his previous work as implementation manager for a vendor of commercial financial accounting software. He is experienced in managing large-scale engagements/projects and leading initiatives that promote the open exchange of ideas and strengthen organizational performance.

Key Qualifications

- Five years' experience in population health warehouse implementation in healthcare enterprise with 10 hospital systems as well as development of enterprise analytics team, including physician data science team
- Four years' implementing an enterprise data warehouse within a state government
- Over 10 years' experience running ERP software implementations nationally
- Over 20 years of experience leading project teams on large, complex projects across the software development life cycle—from business process analysis and procurement planning through contract negotiations and implementation
- Extensive data governance and analysis expertise
- Healthcare data analytics implementations expertise with state environments as well as healthcare enterprise environments
- Experience providing Independent Verification & Validation (IV&V) services

Years of Applicable Experience: 25
Years of Relevant Experience Supporting PRDoH & PRMP: <1

Education and Certifications

MHCDS, Dartmouth College

BA, Business Administration, University of Maine at Orono

Project Management Professional®, Project Management Institute®

Relevant Experience

BerryDunn (2011 to 2014; 09/2019 to present)

West Virginia Department of Health and Human Resources (WV DHHR) – *Enterprise Data Solution (EDS) (09/2019 to present).*
Ryan is serving as the Project Manager for the procurement and implementation of an Enterprise Data Solution (EDS). A major phase of work before the implementation was the development of an enterprise data management and governance strategy and Data Governance Committee. This includes a Data Governance Committee, roadmap, policies and procedures, and approval processes. Ryan is currently working with executive leadership at WV DHHR to build out data governance for the enterprise. The EDS went live March 31, 2023.

Maryland Health Benefit Exchange – *IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).*
Ryan served as a quality assurance analyst for a project valued at approximately $200 million dollars. He worked closely with the project manager and the project team who performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the Executive Leadership of the project.

West Virginia Offices of the Insurance Commissioner (OIC) – *Health Insurance Exchange Planning (06/2011 to 03/2013).*

Ryan served as Project Manager for the development of a Strategic Technology Plan to guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition, he has provided program and portfolio management of the OIC's various planned initiatives that must take place for the HIX to become fully operational and comply with Federal healthcare reform requirements.

Maine Human Resources Division (HRD) – *System Analysis and Requirements Development for Procurement of Human Resources Management System (03/2012 to 08/2012).*

Ryan served as project manager for the development of requirements for an RFP to procure a Human Resources Management System (HRMS) for the State of Maine's HR Division. Ryan's responsibilities included:

- ✓ Conducting a Current Environment Assessment
- ✓ Documenting process flows for each of the major business processes
- ✓ Identifying issues, challenges, and bottlenecks within each process flow
- ✓ Conducting research of peer state agencies
- ✓ Developing technical and functional requirements for inclusion in an RFP to procure a new HRMS

Massachusetts Office of the State Auditor (OSA) – *IT Roadmap (04/2012 to 06/2012).*

Ryan served as project manager for BerryDunn's engagement to develop a 48-month Technology Roadmap. His responsibilities included:

- ✓ Conducting a Current Environment Assessment
- ✓ Identifying issues, challenges, and bottlenecks with current systems and processes
- ✓ Conducting research of peer state agencies
- ✓ Developing technology initiatives to address the issues, challenges, and bottlenecks
- ✓ Providing a Technology Roadmap to guide the State Auditor's Office over a four-year horizon

New Hampshire Liquor Commission (NHLC) – *Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012).*

Ryan served as project manager for a systems planning and RFP development project for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse Inventory Management System, Liquor Inventory and Distribution System, and supporting back office systems.

MaineHealth Accountable Care Organization (MHACO) (2015 to 09/2019)

As the senior director of data operations and analysis, Ryan was responsible for data operations, analytics, and clinical applications teams for the MHACO. He procured an enterprise-wide multi-million-dollar Population Health Management Software Tool; was responsible for the aggregation of EMR/EHR data across different EMR/EHRs as well as claims data from commercial payors and CMS MSSP; developed analytic strategy and plan tied to operating plan to enable data driven decisions; developed a data request triage process as well as data request help desk process; implemented help desk software; and oversaw the legacy internally built clinical integration registry and the transition to the new Population Health Tool.

Dartmouth Medical School, Northern New England Accountable Care Collaborative, & High Value Health Care Collaborative (2014 to 2015)

Ryan served as an account manager and program director, hired by Dartmouth Medical School to work with NNEACC and HVHC to establish process and structure around programs and manage member accounts. He established internal project management process and worked with core disease research teams at HVHC to determine and develop structure around each of the teams and assist in providing focus, tracking deliverables, developing reporting process, and defining value and goal attainment.

Tyler Technologies (2002 to 2011)

As implementation manager for Tyler Technologies (formerly Advanced Data Systems), Ryan managed a team of consultants implementing financial software for the company's School Solutions Division. He managed software implementations in accordance with PMI® standards for schools and health centers. Ryan successfully managed over 350 projects from point-of-sale to handoff to support, including meeting with clients to establish a project timeline, creating and reviewing documentation, facilitating client status meetings, obtaining client approval of key deliverables and milestones, providing quality assurance oversight of implementation activities, and managing staff resources. In addition, he provided client software support for MUNIS financial accounting software.

Bath Iron Works (1999 to 2000)

As a buyer for Bath Iron Works, Ryan managed a multi-million dollar budget and was responsible for purchasing multiple commodities. He implemented an inventory system for warehousing at the shipyard, developed and maintained purchasing contracts with suppliers, and assisted with the shipyard's SAP procurement system implementation.

BerryDunn

Austin Wagenknecht, PMP®
Subject Matter Expert, Enterprise Governance, PgMO

Years of Applicable Experience: 10
Years of Relevant Experience Supporting PRDoH & PRMP: <1
Education and Certifications

Bachelor of Arts, Economics, California State University

Project Management Professional®

Lean Six Sigma Yellow Belt

Public Sector Technology Group, Member and Workgroup Chair

MITA Governance Board - Workgroup Member

Austin is an experienced Medicaid Business Operations and Enterprise Governance Strategist with extensive experience in enterprise governance, data governance, strategic planning, business process improvement, modernization planning, business architecture, enterprise architecture, MES Investment Management, and project management. Additional experience includes implementation of enterprise governance frameworks to support organizational strategic planning, outcomes development, and performance monitoring. Austin is also active in national Medicaid forums and conferences. Austin has been a presenter on a variety of topics at the Medicaid Enterprise Systems Conference (MESC) (2017, 2018, 2019, 2021, 2023) and State HIT Connect Summit (2021). Presentation topics include Enterprise Business Process Strategy, CMS MES Certification Strategy, Outcomes-Based State Self-Assessment.

Key Qualifications

- ❖ 10 years of Strategic Planning, Program/Portfolio Management, Policy Development, and OCM experience
- ❖ Eight years of Enterprise Governance experience
- ❖ Eight years of Data Governance experience
- ❖ 10 years of Business Operations Strategy experience
- ❖ Eight years of Enterprise Performance Management experience
- ❖ Four years of MES Investment Management experience
- ❖ Eight years of Enterprise Architecture experience
- ❖ Eight years of Modernization Strategy experience
- ❖ Eight years of Enterprise MES Roadmap Development experience
- ❖ Nine years of experience working for the CA Department of Health Care Services (Medicaid)

Relevant Experience

InterVision Systems (05/2016 to 8/2023)

California Department of Health Care Access and Information (08/2022 to present)

Austin works as the data governance lead and leads the development and implementation of an Enterprise Data Governance program. He has developed Enterprise Data Governance framework, roles and responsibilities, and strategy and roadmap. Austin leads the development and implementation of Data Standardization Workgroups. Austin has managed the following projects and initiatives:

- ✓ Lead workgroups for Address Standardization, SOGI, REaL, and Payer Categories
- ✓ Data Steward orientation and education
- ✓ Data Owner orientation and education
- ✓ Data Custodian orientation and education
- ✓ Data Governance Tool analysis and recommendation
- ✓ Project Data Governance Framework implementation

- ✓ Data Issue prioritization and management

Department of Health Care Services (05/2016 to 8/2023)

Medicaid Information and Technology Architecture (MITA) Support

Austin served as the contract manager as well as the lead for the Business Architecture work in the Director's Office. As senior project manager, Austin has managed the following projects and initiatives:

- ✓ Enterprise Governance – Operational Project Manager, managing the facilitation and content development for Enterprise Governance and day-to-day management of all Governance activities
- ✓ Enterprise Portfolio Management – Leading the development of portfolio management processes and policies and managing portfolio implementation activities in Jira®; leading cross divisional teams in portfolio development and developing enterprise dashboards and reporting
- ✓ Enterprise Electronic Funds Transfer (EFT) – Managing implementations for Pharmacy and Dental provider payments
- ✓ Enterprise Document Management (EDM) – Managing Director's Office Implementation of Hyland OnBase as well as performing the enterprise implementation planning for EDM
- ✓ COVID-19 Unwinding – Leading Executive Forums and Planning for Unwinding the Public Health Emergency
- ✓ Population Health Management (PHM) Service – Leading the project initiation efforts, including RFO and APD development
- ✓ 2017 MITA SS-A – Scorecard Development, Business Profile Development, Concept of Operations and Gap Analysis, and Maturity Models Updates
- ✓ 2018 MITA SS-A – Updates to Business Profiles, Contractor Management Concepts of Operations
- ✓ 2019 MITA SS-A – Enterprise Scorecard Development, Maturity Model Updates, Financial Management Concepts of Operations and Gap Analysis, MES Certification SS-A updates
- ✓ 2020 MITA SS-A – Working with Executive Leadership on SS-A approach and redesign, MES Certification SS-A updates
- ✓ Developing strategy to implement MES Investment Toolkit as an integrated tool with Strategic Planning, Portfolio Management, and MES Modernization
- ✓ Providing Enterprise Governance and Leadership Development and Facilitation
- ✓ Leading and facilitating the Executive Steering Committee and Strategic Initiatives Workgroup as a part of the first phase of Enterprise Governance implementation
- ✓ Leading and facilitating both the MITA Governance Team (MGT) and MITA Governance Workgroups from 2017 to 2020; leading the support work for the MITA Governance Workgroups to assist with project initiation to help ensure enterprise-wide solutions were being proposed to MGT
- ✓ Developing the support structure and facilitating both the COVID-19 Leadership Forum and the COVID-19 Workgroup to support the enterprise-wide effort to unwind the Public Health Emergency; helping ensure alignment with strategic goals of the Director's Office
- ✓ Leading and facilitating the Provider Management Steering Committee and assisting in the enterprise analysis to leverage PAVE as a common solution across the enterprise
- ✓ Leading and facilitating the Enterprise Certification Management Committee
- ✓ Leading the Director's Office Implementation of Enterprise Business Architecture and Analysis
- ✓ Managing and directing the Business Architecture work for the Director's Office
- ✓ Managing and updating the Enterprise Business Process & Capability Map – all of the Medicaid-related processes that supports the business of Medicaid
- ✓ Identifying and providing training for current and new Business Process Owners
- ✓ Leading Business Process Improvement Efforts for Enterprise processes that require approval and signatures in the Director's Office
- ✓ Leading Business Process Improvement Efforts for processes related to APDs in support of its role in

Governance

- ✓ Developing processes to support Enterprise MES Certification including the Certification Management Strategy
- ✓ Leading Business Process Improvement Efforts for the Family PACT Division and BCCTP program area to improve process timing and reduce errors in processing
- ✓ Leading the enterprise analysis for EFT to determine the direction for an enterprise solution for processing payments

Public Consulting Group (06/2013 to 05/2016)

California Department of Health Care Services - *Managed Care Quality and Monitoring Division – Encounter Data Improvement Project*

- ✓ Management of new processes developed in the Encounter Data Quality Improvement Project for the Managed Care Quality Monitoring Division responsible for encounter data quality for managed healthcare
- ✓ Documented the new processes and applied business process improvement methodologies to retiring processes
- ✓ Authored policy and procedure documents for MCQMD
- ✓ Managed high sensitivity projects for the unit and coordinated with multiple entities to achieve goals for the entire division

City of Carmel - *IT Strategic Plan Development*

- ✓ Analyzed and determined best practices for ERP, HR, and Finance software
- ✓ Conducted stakeholder interviews to gather requirements from stakeholders and developed IT Strategic Plan Draft
- ✓ Developed the RFQ drafts documents for the ERP/HR/Finance software solutions and created the requirements traceability matrix
- ✓ Performed business process improvement and reengineering for future ERP/HR/Finance software
- ✓ Facilitated vendor proposed software demonstrations for business and IT stakeholders

City Borough of Juneau, Alaska - *IT Strategic Plan Development*

- ✓ Facilitated stakeholder sessions to identify system and project goals, objectives, and initiatives for input to the City Borough's IT strategic plan
- ✓ Provided recommendations for managing IT projects across divisions
- ✓ Drafted the IT Strategic Plan for the IT department and developed strategies for City Borough IT Investment and Budget management

Brittany Ludwiszewski, MBA, MS
Subject Matter Expert, OCM

BerryDunn

Brittany is a subject matter expert with experience in change management strategy, including directing a change management team and executing change strategies for major organizational initiatives. Her skills include engaging stakeholders and communication and developing communication plans to help ensure engagement and alignment throughout the change life cycle. She also has provided training and development to stakeholders and supported risk mitigation and project integration initiatives.

Years of Applicable Experience: 13

Education and Certifications

MBA, Business, Capella University

MS, Psychology, Capella University

Diploma in Change Management, Saylor University

Leading Diverse Teams & Organizations Certification, Michigan University

Project Management Certificate, CITI Program

Types of Conflict Certification, University of California, Irvine

Diversity, Equity and Inclusion in the Workplace Certificate, University of South Florida

Key Qualifications

❖ Over 13 years of experience in leading full-cycle organizational change, including implementing change initiatives, driving adoption, and enhancing organizational effectiveness to achieve strategic objectives

❖ Over six years in healthcare/health and human services industry with oversight on several projects relating to advances in personal care, wellness care, b2b healthcare relationships, and HUMAN TECAR™ technology implementation

❖ Over 13 years conducting change impact assessments and stakeholder analyses to identify potential resistance and develop mitigation strategies

❖ Over 13 years of experience in successfully leading and delivering complex projects and programs; adept at strategic planning, stakeholder management, and cross-functional collaboration to help ensure the achievement of organizational goals

❖ Over five years of experience leading, strategizing, and implementing IT/Programming team initiatives

Relevant Experience

BerryDunn (10/2023 to present)

Brittany is a subject matter expert in BerryDunn's Medicaid Practice Group.

Acoustiblok, Inc. (08/2022 to 09/2023)

Brittany served as the director of programs. She directed a change management team in creating and executing change strategies for major organizational initiatives, resulting in a 30% increase in successful change adoption. Brittany established change management methodologies and frameworks to improve efficiency and effectiveness in managing organizational transitions. She developed and implemented communication plans to ensure stakeholder engagement and alignment throughout the change life cycle and conducted impact assessments and stakeholder analyses to identify and mitigate potential risks associated with organizational changes.

Garden Grocer, Inc. (03/2016 to 08/2022)

As the Vice President of HR, Brittany oversaw the planning and execution of diverse programs, coordinating efforts across teams to achieve program goals and objectives. She mentored and coached team members, fostering a culture of continuous improvement and knowledge sharing within the program management team and led cross-functional teams in the successful execution of multiple large-scale programs, ensuring alignment with organizational objectives and stakeholders' expectations. Brittany developed and maintained program roadmaps, timelines, and budgets, consistently

delivering projects on time and within budget and implemented program governance and oversight mechanisms to track progress, manage risks, and provide timely reporting to senior management. She established strong relationships with key stakeholders, ensuring effective communication and collaboration throughout the program life cycle and also onboarded, led, and strategized full-cycle IT/Programming team initiatives.

Pure Wellness Company (07/2010 to 03/2016)

Brittany worked as the Chief of People and Organizational Development. She provided strategic guidance to executives and project teams on change initiatives, ensuring alignment with organizational goals and objectives. She led long-term training, development, strategy, and long-term implementation for HUMAN TECAR™ technology integration. Brittany designed and facilitated change management workshops and training sessions for employees at all levels, enhancing their change readiness and resilience. She led the development and execution of change communication plans, ensuring consistent and effective messaging to all stakeholders and coordinated with cross-functional teams to align change efforts with organizational culture, values, and strategic direction.

Christa Bernacchia
Subject Matter Expert, MMIS PgMO

Years of Applicable Experience: 24
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

B.A. Mass Communication, Quinnipiac University, summa cum laude

Member of NAMSS

Secretary - CT NAMSS

Member of CT Chapter of HFMA

Christa leads a team of credentialing professionals and is responsible for the overall vision of the credentialing division, including the firm's NCQA Credentials Verification Organization (CVO) certification. She is an accomplished healthcare strategist and problem solver with two decades of experience in the industry with a focus on credentialing, re-credentialing, privileging, enrollment, primary source verification, accreditation, and quality improvement. She has proven expertise in developing relationships, project planning and implementation, and workflow redesign to improve efficiency and quality.

Christa's experience includes working for a staff model HMO where she managed all internal credentialing, including primary source verification, privileging, Joint Commission accreditation, special projects, and emergency planning efforts.

Key Qualifications

❖ Eighteen years' experience in managerial and leadership positions working with providers, practice groups, health systems, facilities and private payers

❖ Focus on credentialing, privileging, enrollment services (governmental and commercial carriers), primary source verification (PSV), accreditation (NCQA and Joint Commission), regulatory considerations, service excellence, special projects, assessments, healthcare consulting, forecasting, strategic planning, communication, process improvement, quality improvement, audits, reporting, presentations

❖ Served as the functional project manager on the Yale Health Center building project, gaining expertise in collaboration and project management

Relevant Experience

BerryDunn (01/2021 – Present)

As Senior Manager and Director of Credentialing, Christa is responsible for the overall growth and vision of the credentialing service line, including the firm's NCQA Credentials Verification Organization (CVO) certification and credentialing consulting offerings. She leads a dedicated team that helps ensure compliance with current regulatory matters and payer requirements, builds relationships, and manages client communications. The services she oversees include commercial insurance carrier and governmental payer enrollment for providers, groups, and health systems and facilities as well as credentialing, primary source verification, gap analysis and file audits, assessments, organizational redesign, and ongoing/exclusion monitoring needs. Christa also serves as a subject matter expert to support clients as they navigate the changing landscape that is the business of medicine.

VantagePoint HealthCare Advisors (2016 – 2020)

✓ *Director of Credentialing Services*.
Christa managed a team of credentialing specialists and was responsible for the operational oversight of the Credentialing Department, including the organization's NCQA Credentials Verification Organization (CVO) certification. She assisted clients with strategic planning and provided subject matter expertise for a variety of engagements ranging from practice assessments to payer contracting and enrollment strategy, Medicare and Medicaid regulatory and enrollment considerations, and credentialing operations. She also prepared several RFP responses and partnered with compliance and consulted colleagues to support a variety of client engagements.

- ✓ *Credentialing Client Manager.*
  Christa oversaw the credentialing and enrollment services in accordance with all state and federal regulations, accreditation standards, and managed care criteria. She managed client relationships, assisted in significant client acquisition planning and execution, participated in the management of the credentialing software database, developed reporting strategies, oversaw credentialing and enrollment processes, recommended best practices for workflow improvement, partnered with the credentialing leadership team to support accreditation and PSV efforts, and supervised credentialing specialists.

HealthyCT (2016 – 2016)

As a quality improvement analyst, Christa supported activities and projects related to credentialing, re-credentialing, data analysis, reporting, accreditation, HEDIS, audits, and member and provider experience. She conducted analysis to identify gaps in data, systems, and processes and created workflows/best practices to help ensure corrective actions were implemented and maintained. She managed external vendor oversight (outsourced CVO services), including leading CVO and internal file audits, to help ensure timely and ongoing compliance with agreements and requirements as well as credentialing and re-credentialing time frames. She supported initiatives for an extensive quality improvement program and was responsible for external accreditation efforts (NCQA) as well as compliance with federal and state regulations and standards.

Yale Health (2007 – 2016)

As manager of administrative services, Christa oversaw the clinician credentialing and privileging processes. She monitored Joint Commission accreditation requirements for compliance with additional federal and state standards. She created policies and defined procedures for best practice, including record retention and reporting. She supervised support staff carrying out daily credentialing and privileging activities and communicated policies and procedures with clinical staff. Christa was a ten-year participant of the Joint Commission Steering team. She participated on University Emergency Operations Team, and she contributed to communications, response, and planning efforts.

Yale Health Center Building Project (2006 – 2010)

Christa served as the functional project manager for the Yale Health Center building project, a 138,000 sq. ft. facility. She developed and fostered strategic relationships while partnering with the University Construction Manager, design team, and builders on all phases of the five-year, one-hundred million dollar project. She led various operational, project, and communication teams and managed all aspects of project planning, space allocation, furniture and medical equipment selection and procurement, internal and external communications, signage, and move coordination. She successfully collaborated with the move coordinator and move consultants to seamlessly reorganize nearly 400 staff and dozens of clinical and administrative departments and services over a period of three weeks, helping ensure redundant operations and continuity of care for members. Christa successfully coordinated with the Sustainability Project Manager to help ensure that the new Yale Health Center complied with U.S. Green Building Council Standards. She also accomplished LEED Gold certification and Green Guide for Health Care registration, making the Yale Health Center the first healthcare facility in Connecticut to achieve such distinction.

In addition, Christa held a variety of coordinator, managerial, and administrative support positions at Yale Health, Yale's University Career Services and Steinbach from 1998 – 2007.

Clara Avalos
Subject Matter Expert, Procurement

Years of Applicable Experience: 12

Education and Certifications

Fluent in Spanish and English

Juris Doctorate (JD), Law, Case Western Reserve University

Bachelor of Arts (BA), Political Science, Bates College

Clara is a transformational strategic procurement director with over 20 years of progressively responsible experience leading procurement, contracts, compliance, and legal terms. She excels in highly visible roles within fast-paced, deadline-driven environments. She is an exceptionally agile and resilient manager with strong business acumen who is passionate about accountability. As a Medicaid Enrollment Systems (MES) Subject Matter Expert, she drives functional vision, direction, and execution, and she manages spend, streamlines productivity, aligns with organizational strategies, and optimizes value. Clara leads initiatives to modernize services, products, and capabilities by partnering with and advising clients at all stages of the procurement process, from developing RFPs through vendor selection, contract execution, and implementation.

Key Qualifications

- ❖ 20 years' experience leading procurement, contracts, compliance, legal teams
- ❖ 25 years public sector experience (both vendor and client)
- ❖ 15 years in the health & life sciences industry, including Medicaid Enterprise Systems, Technology and Consultancy vendors to federal and state healthcare agencies, Health Insurance, Biotech, Scientific Instrumentation, and Pharmaceutical
- ❖ 15 years' experience in business lead/procurement/legal/compliance SME roles, supporting state Medicaid agencies, comparable to and larger than PRMP, as well as large national healthcare provider management organizations similar in size to, and larger than, PRMP
- ❖ 20 years developing high-performing procurement, contracts, and compliance teams in large matrixed global organizations and public sector entities
- ❖ 25 years' experience leading cross-border teams in multiple countries and time zones

Relevant Experience

BerryDunn (10/2023 to present)

Clara is a subject matter expert in BerryDunn's Medicaid Practice Group.

Commonwealth of Massachusetts (EOHHS) (02/2022 to 07/2023)

As the Senior Director of HIX Procurement IT Contracts and Vendor Management, Clara developed, managed, and executed contracting strategy for the MassHealth technology vendor contracts. She positioned strategic procurement/sourcing competitively by aligning business unit and stakeholders to maximize objectives and help ensure continuity of supply. Clara was responsible for $800M+ direct and indirect annual spend on IT products and services (SaaS, custom analytics, cloud services, hardware, telecom devices, etc.). She negotiated and drafted contract clauses based on documented standards in line with deal-specific aspects as supported by internal stakeholders.

Avalos Consulting Services (06/2019 to 02/2022)

Clara served as a principal and as an executive consultant and developed and led high-performing teams in MES Procurement, Compliance, Contracts, and Program Management. She worked closely with leadership, business partners, and provider organizations to advance MES procurement contracting initiatives and teamed with business partners, and

internal stakeholders to understand needs, determine risks, and design execution plans. Clara assessed transactions, developed deal strategies, and communicated with peers, leadership, stakeholders, and third parties. She collaborated with key stakeholders for input and approvals and helped ensure MES procurement contracts initiatives were in sync with state and federal government programs and integrated strategies and operations across all functions. She regularly negotiated complex global enterprise-wide agreements with top technology providers. Clara conducted market research, prepared reports, and gave presentations focused on a variety of MES procurement matters, including trends, vendor data, insights, variables, and options. She also facilitated RFP Q&A sessions, vendor conferences, evaluation sessions, contract negotiations sessions, and post-award debriefing sessions.

Booz Allen and Hamilton (10/2018 to 06/2019)

As the contracts director, Clara managed multi-year contract in support of the Center for Medicaid Services (CMS) Marketplace Systems Integrator (MSI) contract award to coordinate the implementation of federally funded marketplaces (FFM). She led teams tasked with helping ensure compliance alignment with continuing congressional mandates and constantly evolving regulatory requirements, and she also managed complex contractual relationships in support of the technical coordination of multiple interoperable sets of systems.

Accenture (06/2016 to 11/2018)

Clara served as both the Digital Legal Subject Matter Expert as well as the MES/MMIS Programs Contracts Director. She directed highly specialized teams of procurement contracts managers, each with multiple direct reports. Clara steered and participated in creating new provider strategies, reimbursement models, networks, and approaches. She planned and executed negotiation strategies within allotted timeframes in a constantly changing environment, and she was responsible for strategic sourcing teams that managed IT vendor operations and spend on behalf of state government client HHS entities. Clara negotiated agreements with key Operations and Maintenance (O&M), Design, Development, and Implementation (DDI) IT products (SAAS), and services providers, and she also directed Health & Life Sciences contracts compliance team tasked with helping ensure MES and MMIS client contracts complied with applicable federal and state regulations.

Avalos Consulting Services (11/2014 to 06/2016)

As the Principal Consultant of MES Program Management, Procurement, Contracts, Legal and Compliance, Clara advised and consulted founders, General Managers, CEOs, and leadership teams. She supported clients throughout the bid proposal process, Q&A, post-award negotiations, and implementation of IT contracts with state government Health and Human Services clients for MES requirements. Clara negotiated MES IT contracts that met client objectives and adhered to organizational and regulatory requirements. She assessed contractual deviation from standard terms impacts, prepared risk assessments, and engaged internal parties.

Thomson Reuters, Inc. (07/2011 to 11/2014)

Clara served as the director of compliance. She established compliance, contracts, and strategic procurement programs for $1.3B IP & Science division of global technology/media/financial corporation, resulting in operational benefits and significant savings. She provided thought leadership to cross-functional teams tasked with developing strategic planning initiatives for public sector client MES modernization efforts. Clara led teams that managed contingent workforce, managed relationships with domestic and offshore staffing agencies, and drove operational improvements (design and build) to support the business strategy.

Avalos Consulting Services (10/2008 to 06/2011)

As the principal consultant, Clara helped ensure regulatory and contractual compliance by advising and making recommendations to project managers, proposal development staff, and leadership. She established governance and communication framework for alignment, oversight, and key decision making.

Colin Buttarazzi, PMP®, CAPM®
Subject Matter Expert, Certification and Compliance

b BerryDunn

Colin is a manager in BerryDunn's Consulting Services Team with experience in communicating and executing strategic plans, coordinating membership development for various groups, and coordinating finance activities. He has worked on a wide range of projects with a focus on programmatic audit, forensic audit, financial process improvement, invoice review, and data analysis. Colin holds a Project Management Professional® certification and uses best practices from the Project Management Body of Knowledge (PMBOK®) to help clients achieve their project objectives.

Key Qualifications

❖ Nearly eight years compliance and risk management consulting
❖ Certified Project Management Professional® (PMP®)

Years of Applicable Experience: 8
Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

BS, Economics and Business Management, University of Maine

Project Management Professional (PMP®)

Certified Associate in Project Management (CAPM®)

Relevant Experience

BerryDunn (05/2015 to present)

Puerto Rico Department of Health – *Medicaid/CHIP Eligibility Determination Review (11/2021 to present).*
Colin is a lead auditor on the BerryDunn team in charge of reviewing accuracy of Puerto Rico Medicaid Program (PRMP) eligibility determinations and recertifications, as well as capitation payments, on a sample of Medicaid and Children's Healthcare Insurance Program (CHIP) beneficiaries.

Maine Department of Environmental Protection (DEP) – *Enterprise Licensing Planning (06/2020 to present).*
Colin is working on the BerryDunn team that is assisting the DEP in planning for the replacement of its Enterprise Licensing System. This project involves the development of functional and technical requirements, performing research into licensing systems in peer states and conducting an analysis of the overall cost of acquisition. At the conclusion of the project, BerryDunn will present a thorough business case for the acquisition and implementation of a next generation licensing system to executive bodies. Colin is also assisting with the return-on-investment document that will help the DEP anticipate costs of implementing a modern licensing system.

West Virginia Bureau of Medical Services (BMS) – *EHR Provider Incentive Payment (PIP) Audit (07/2016 to present).*
Colin is serving as the manager on BerryDunn's team that is providing expertise and assistance in performing annual Medicaid EHR PIP Audits. As a part of this team, he develops an audit strategy, performs risk assessments to identify the sample selection, communicates with providers and hospitals, and conducts both desk and field audits of an identified sample selection. Colin performs extensive deliverable creation and review; maintains action, decision, and question logs; and develops weekly completion of client-ready documentation.

State-Based Health Insurance Exchange – *Programmatic and Financial Audits (2015 to present).*
Colin is on the team that provides the annual programmatic audits for seven state-based health insurance exchanges (HIXs), which includes Massachusetts, Minnesota, Nevada, Pennsylvania, Rhode Island, Vermont, and Washington.

BerryDunn also performs financial audits for Nevada, Rhode Island, Vermont, and Washington. The programmatic audit assesses compliance with federal requirements associated with 45 CFR 155. The financial audit portion follows GAAP and Yellow Book standards. Over the past several years, our team has helped our HIX clients navigate a variety of policy changes enacted because of the COVID-19 pandemic.

Missouri Division of Accounting – *Overtime Pay Review (10/2021 to 12/2021).*
Colin was a lead analyst on the team that reviewed if employee payroll and compensatory time provided to essential government workers as a result of the COVID-19 pandemic was calculated in accordance with the requirements of the Fair Labor Standards Act (FLSA).

Maine Department of Administrative and Financial Services (ME DAFS) – *Enterprise Services Assessment (03/2021 to 10/2021).*
Colin was the lead analyst on an engagement to review ME State Postal Service operations and finances to assess their current and future financial viability. As a part of this project, Colin reviewed revenue and expense reports, interviewed internal stakeholders and peer states, analyzed staffing and payroll levels, managed project stakeholders, facilitated meetings, and prepared and presented the final report.

New Hampshire Secretary of State's (NHSOS) – *CARES Act Grant Management (06/2020 to 06/2021).*
As the senior cost analyst, Colin helped New Hampshire identify and claim costs under the CARES Act to help prevent, prepare for, and respond to COVID-19 for the 2020 federal election cycle. Colin assisted with identifying eligible costs for reimbursement and how to claim those costs to the federal grant. He coordinated with cities and towns to respond to requests for information and data under very short and non-negotiable timelines. Colin also supported the development of a methodology to calculate a standard cost rate for processing the additional absentee ballots.

Wyoming Legislative Service Office (LSO) – *IT Funding Requests Study (08/2020 to 12/2020).*
Colin worked on the BerryDunn team that is conducting a study of the State's IT funding request development and review process and of specific IT funding requests selected by the Joint Appropriations Committee (JAC). The JAC hired BerryDunn to use 19 IT funding requests as example requests, for purposes of assessing the IT funding request process, from the planning stage to the review and decision-making phase, and identification of areas for improvement and correlating recommendations to further enhance and develop the process. The JAC also directed BerryDunn to use five of the 19 IT funding requests as case studies—for purposes of determining the sufficiency of the due diligence exercised in the planning and decision-making related to each request. BerryDunn delivered a study report to the JAC that contains our study findings and formally present the report to the JAC. Colin assisted with process flow diagramming, project management, and reporting.

Alaska Division of Legislative Audit (DLA) – *Medicaid and Children's Health Insurance Program (CHIP) Eligibility Determinations and Best Practices (06/2019 to 09/2019).*
Colin worked as a senior analyst conducting redeterminations of eligibility for Medicaid and CHIP members to identify whether the Alaska Department of Health and Human Services (DHSS) agency was appropriately granting eligibility according to federal and state regulations and statutes.

Colorado Office of State Auditor – *Marijuana Inventory Tracking Data Evaluation (03/2019 to 09/2019).*
Colin worked as an analyst on an evaluation of the Colorado Department of Revenue's (DOR) administration of the marijuana industry to identify opportunities for the DOR to better leverage and use marijuana inventory tracking data to inform, direct, and target the DOR Marijuana Enforcement Division's (MED) inspection and enforcement activities and the DOR Tax Division's audit activities. Colin helped assess to what degree they have proper controls in place to minimize the risk of tax evasion and the diversion of marijuana products to illegal markets.

Metropolitan Government of Nashville and Davidson County (Metro), TN Office of Internal Audit (OIA) – *Program Audit and Monitoring Services (03/2019 to 05/2019).*
Colin worked as a project lead and senior auditor on two vendor audits structured as AUP engagements for the Office of Internal Audit. Colin led interviews, performed invoice and labor testing, reviewed contracts, and assisted with the development of the final report for the Office of Internal Audit.

Colorado Department of Human Services (DHS) – *Operational, Financial, and Account Review of Automated Support and Enforcement Processes and System (02/2018 to 06/2018).*
Colin's analysis assisted the Division of Child Support Services (DCSS) in modernizing their financial system and reconciliation process within the Colorado Automated Support and Enforcement System (ACSES). Colin was responsible for identifying program requirements through researching and documenting applicable federal and state laws. He also

helped research and write the final deliverable which will provide recommendations to the State in hopes of modernizing their current approach.

Massachusetts HIX/IES Entities – *IV&V Services (05/2015 to 04/2018).*
BerryDunn provided IV&V for Massachusetts' HIX/IES implementation. Colin assisted with the Financial Review task area of the IV&V services, provided monthly financial status reporting, documented cost allocation methodologies, reviews of System Integrator's invoices, and assisted with change request review. Colin's main role was to perform a monthly analysis of all expense reports and compile a detailed deliverable invoice review.

Children and Family Services of New Hampshire – *Forensic Accounting Services (10/2016 to 12/2016).*
Colin was a lead analyst in providing Forensic Accounting Services to Children and Family Services of New Hampshire, a non-profit organization. He assisted with on-site interviews and document review activities. The project included drafting initial findings as well as preparing a final audit report.

City of Alexandria, VA – *Review of Community-Based Mental Health and Substance Abuse Services (07/2015 to 02/2016).*
The City's Community Services Board (CSB) oversees the use of public funds to provide mental health, intellectual disability, and substance abuse services. Colin helped review the CSB's processes for third-party billing and identify opportunities to improve identification and collection of revenues from third-party sources, submission and monitoring pre-authorization requests to third-party sources, and management and determination of patient payment responsibilities (e.g., co-payments, co-insurances, and deductibles). Colin performed data analysis and reviewed documents to help ensure compliance with federal and state regulations. Colin helped develop BerryDunn's recommendations to assist with the implementation of a more sustainable and efficient process.

Board of Trustees for the University of Southern Maine (2012 to 2014)

Colin attended Board of Trustees meetings as an undergraduate representative, traveling around the State of Maine and reporting back to the Student Government. He maintained constant communication with the Board of Trustees, the President of the University of Maine, the Vice President and Dean of Students, and the executives of the Undergraduate Student Government at the University. Colin served as an intermediary and often facilitated open discussion between the groups to establish common ground and agreement. As a member of the Blue Sky Strategic Advisory Board (2014), Colin participated in the University's five-year strategic planning process. While a member of this board, Colin was the representative of the students, and he worked to help ensure student needs were properly addressed.

Erica Rice
Subject Matter Expert, OCM

Erica is a senior consultant in BerryDunn's Medicaid Practice Group who specializes in managing Centers for Medicare & Medicaid Services (CMS) systems certification efforts, Medicaid Information Technology Architecture (MITA) State Self-Assessments (SS-As), and organization development. Erica is a Prosci® Certified Change Practitioner. Erica's experience also includes working with state Medicaid agencies on Request for Proposals (RFPs) requirements gathering and development and conducting Medicaid Enterprise System (MES) and vendor assessments.

Years of Applicable Experience: 14

Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

BS, Health Care Management, Granite State College (in progress)

Associate Degree, Medical Assisting, Mid-State College

Key Qualifications

- ❖ 14 years' experience with Medicaid agencies through the change process, providing training to end-users, writing business process documents, performing gap analyses; configuring MMIS modules, managing and/or supporting OCM, training, CMS certification, and MITA SS-A efforts
- ❖ 10 years' experience managing CMS certification processes
- ❖ 10 years' experience conducting MITA SS-As, contract and business operations analyses, and MMIS system configuration
- ❖ Prosci® Certified Change Practitioner for five years

Relevant Experience

BerryDunn (09/2017 to present)

Puerto Rico Medicaid Program (PRMP) (08/2019 to present)

- ✓ *Federal Fiscal Year (FFY) 2023-2024 Enterprise Objective Monitoring and Control (EOMC) Services (10/2022 to present).*
  Erica is a deputy program manager and continues to serve as the Subprojects Service Area lead on the EOMC engagement and as a SME on the OCM subproject. She also supported the Outcomes-based Procurement service area. Erica was the project manager for the Phase III Project Health Assessment that helped PRMP gain clearer insight into the project's status and to help identify gaps, risks, and issues.
- ✓ *Federal Fiscal Year (FFY) 2022-2023 EOMC Services (10/2021 to 09/2022).*
  Erica was the project manager for the EOMC engagement's subprojects service area. As the project manager for this service area, Erica works to assign staff with the required skillsets to accomplish all project activities. She demonstrates flexibility and understanding of her clients' evolving needs.
- ✓ *FFY 2021-2022 EOMC Services (10/2020 to 09/2021).*
  Erica was the project manager on the Organizational Integration Support (OIS) service area. The OIS service supported the Puerto Rico Medicaid Program's organization development efforts. Erica and her team provided organization analysis on PRMP's current state via BerryDunn's Organizational Excellence Inventory and interviews with PRMP key leaders. This work resulted in an Organizational Design and Development Report and Roadmap that provided PRMP with findings and recommendations PRMP might consider in their organization development efforts.
- ✓ *FFY 2020 Medicaid Management Information System (MMIS) Phase 2 EOMC Services (10/2019 to 09/2020).*
  Erica served as the Deputy Project Manager, assisting with project management activities including monthly status reports, providing project management-level deliverables review, and assisting with managing resources.
- ✓ *EOMC Services (07/2019 to 09/2019).*

Erica worked as the CMS Certification Team Lead for the initial EOMC Engagement.

Vermont Agency of Digital Services (ADS)

- ✓ *5% Cost Sharing Cap Project Independent Review (03/2022 to 04/2022).*
  Erica was the project manager for the 5% Cost Sharing Cap Independent Review project. This project entailed reviewing multiple vendor contracts, conducting fact-finding interviews with project stakeholders, including the State's leadership, project manager, business analysts, financial subject matter expert, and vendors' staff. Erica and her team provided ADS with an independent review report describing the specific business values, business needs, and outcomes the State identified for the 5% Cost Sharing Cap Project vendors to help achieve. The report included a cost analysis of the project, identified risks and issues, suggested mitigation strategies for risks and issues, and provided overall recommendations related to the status of the project.

- ✓ *Transformed Medicaid Statistical Information System (T-MSIS) Independent Review (12/2021 to 02/2022).*
  Erica was the project manager for the T-MSIS Independent Review project. This project entailed reviewing the T-MSIS vendor contract, conducting fact-finding interviews with T-MSIS project stakeholders, including the State's leadership, project manager, business analysts, financial subject matter expert, and vendor staff. Erica and her team provided ADS with an independent review report that described the specific business values, business needs, and outcomes that the State identified it expects the T-MSIS vendor to help achieve through the T-MSIS Reporting Enhancement Project and included a cost analysis of the project.

- ✓ *Interoperability Platform Independent Review (10/2021 to 11/2021).*
  Erica was the project manager for the Interoperability Platform Independent Review project. With the goal of helping the State achieve its goals for complying with federal and state regulations, Erica and her team analyzed the vendor contract and information gathered during fact-finding sessions to provide ADS with an independent review report describing the specific business values, business needs, and outcomes the State identified for the Interoperability Platform vendor to help achieve. The report included a thorough cost analysis of the project, identified risks and issues, suggested mitigation strategies for risks and issues, and provided overall recommendations related to the status of the project.

West Virginia Department of Health and Human Resources (DHHR)

- ✓ *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2018 to 12/2018).*
  Erica served as a Senior Business Analyst for the Data Visioning and Warehouse Development and Procurement Assistance Project focused on supplying project management services to the State to assist with the integration of data sources, systems, and databases within West Virginia DHHR. Erica's responsibilities included facilitation and gathering of RFP specifications; assisting with the RFP development; oversight of a team of six to eight individuals; and keeping CMS certification in focus for the project.

- ✓ *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (01/2019 to 11/2019).*
  Erica worked as the MITA SS-A project manager leading a team of six people.

New Hampshire Department of Health and Human Services (DHHS)

MMIS and Fiscal Agent Services Assessment and Strategy Project (03/2018 to 08/2018).
Erica was a Senior Business Analyst for the MMIS and Fiscal Agent Services Assessment and Strategy project. The final deliverable included potential MMIS re-procurement options for the State to consider for the future. Throughout the project, Erica worked closely with the DHHS Deputy Commissioner, Medicaid Director, MMIS Director, and other DHHS leaders to discuss the assessment findings and to develop MMIS procurement options.

New Jersey Division of Medical Assistance and Health Services

MMIS Implementation and Certification Leverage and Reuse Project (09/2017 to 01/2018).
Erica served as the Certification Team Lead and assisted the State in its certification efforts.

Change Healthcare Holdings, Inc., (09/2016 to 08/2017)

As the CMS certification lead and governance team lead, Erica was responsible for developing processes to help ensure certification of Change Healthcare's pharmacy benefits management system (PBMS). She worked closely with clients in Vermont and Wyoming to provide guidance on approach to MMIS and PBMS CMS certification and with subject matter experts (SMEs) in cross-functional areas to produce evidence to satisfy criteria put forth by the CMS. Her role included helping ensure evidence produced in response to certification criteria provided a complete picture of the Change

Healthcare PBMS and how it complied with certification criteria. She developed a baseline process to help ensure consistency and reuse of certification evidence to benefit future State clients.

Molina Healthcare, Inc. (07/2009 to 09/2016)

✓ *CMS Certification Manager/Senior MITA Analyst*
Erica served as the manager of the MMIS Certification Team, in which she set standards for documentation and processes for the CMS MECT pilot program using the Medicaid Enterprise Certification Lifecycle (MECL) approach to certification. She was responsible for process creation surrounding delivering certification evidence in support of the Medicaid Enterprise Certification criteria and developing documentation standards and strategy to help ensure comprehensive evidence was provided to CMS for the West Virginia certification project.

✓ *Business Process Modeler and Trainer*
In this role, Erica created QNXT/HealthPAS-Administrator Configuration user guides focusing on system navigation, including detail beyond the QNXT Help file, such as describing internal processes. She extracted information from user guides to create job aids for call center representatives and other Molina Healthcare staff and developed eLearning videos for the Molina Healthcare Learning Management System (LMS). She provided in-person and remote training on the configuration, provider, member, fee tables, carriers/programs, and provider credentialing modules of the QNXT platform, and she was the lead trainer for QNXT SQL Schema, Provider, and Member business areas. She assisted in creating QNXT SQL Schema training courses on multiple modules within QNXT, helped develop the training environment, and developed business process models to help ensure proper visual documentation and representation of Molina Healthcare's end-to-end business processes.

✓ *Configuration Analyst*
Erica was responsible for configuring provider contracts for the Maine Integrated Health Management Solution (MIHMS). She worked closely with the State's provider contracts SME to configure new contracts and update existing contracts based on the Maine's Medicaid policies. She trained claims resolution and provider relations representatives and assisted with configuration and maintenance of multiple QNXT modules.

Jeffrey Stoddard, Prosci® CCP
Subject Matter Expert, EDW

Years of Applicable Experience: 15

Years of Relevant Experience Supporting PRDoH & PRMP: <1

Education and Certifications

BS, Management of Information Systems, University of Vermont

Prosci® Certified Change Practitioner

Health Leadership Development Program, Daniel Hanley Center for Health Leadership

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

Key Qualifications

- ❖ 19 years working in developing and managing healthcare data/systems in various capacities, ranging from data analyst to project manager to director of software development and operations to chief information officer
- ❖ Four years working in a similar role for the WV Bureau for Medical Services
- ❖ 20+ years' experience leading complex healthcare systems development teams and initiatives
- ❖ 20+ years' experience designing data management systems and reporting architecture to support big data initiatives
- ❖ Experience leading state data improvement and encounter data quality initiatives
- ❖ Experience leading state usability and evaluation of Medicaid Management Information Systems (MMIS) and Data Warehouse/Decision Support Systems
- ❖ Experience advising on the development of COVID-19 resource allocation and testing dashboards

Relevant Experience

BerryDunn (12/2019 to present)

As a data management and strategy manager, Jeffrey works with state healthcare agencies and non-profit and commercial healthcare organizations to assist in system, data, and analytic projects to achieve program objectives related to improving healthcare outcomes and reducing costs.

West Virginia Bureau for Medical Services (BMS)

- ✓ *Data Improvement Project (12/2019 to present).*
  Jeffrey provides technical leadership and analytic support for the project that assists the state in understanding and addressing data quality and usability issues affecting its Medicaid program.
- ✓ *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to 03/2022).*
  Jeffrey provided technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.
- ✓ *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
  Jeffrey provided technical leadership and business analysis support to the Department of Health and Human Resources (DHHR) for the implementation of the state's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

West Virginia Department of Health and Human Resources – *Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2020 to present).*
Jeffrey provides subject matter expertise and analytic support to assist the state in implementing their multi-source data warehouse solution.

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

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

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

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

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

Arcadia Solutions (04/2012 to 07/2013)

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

Health Dialog (09/2004 to 04/2012)

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

Jim Strasenburgh
Subject Matter Expert, EDW

Jim is a senior consultant with BerryDunn's Consulting Services Team. He has over 30 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, including serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. While at BerryDunn, Jim has focused on healthcare systems, working on several state Medicaid IV&V projects, and he also serves as trusted advisor for his BerryDunn clients.

Years of Applicable Experience: 10

Education and Certifications

BA, Philosophy, St. Lawrence University

Key Qualifications

- ❖ 40 years in systems engineering, software development, and operations
- ❖ Six years working in Massachusetts HIX/IT
- ❖ Two years working in MAHIX
- ❖ Three years working with DWH systems
- ❖ Nine years of experience supporting the success of state HHS agencies
- ❖ Experience providing systems architecture/design support for eligibility systems, including system architecture/design support, data governance, large-scale datacenter creation and migration, and data architecture in states such as Maryland, Massachusetts, and Missouri
- ❖ Over six years of IV&V experience helping clients achieve their project objectives in Maryland, Massachusetts, and Missouri
- ❖ Extensive technical knowledge in state and federal eligibility statutes, rules, governance, and processes (e.g., FDSH, MARS-E, National Institute of Standards and Technology, FISMA, HIPAA)
- ❖ Lead architect for a $250M IT outsourcing project
- ❖ Possesses extensive technical knowledge including expertise in system architecture and cloud-based systems
- ❖ Technical advisor for a breadth of software solutions, including eligibility system migration to Amazon Web Services, cloud-based systems, and varying technical applications

Relevant Experience

BerryDunn (02/2013 to present)

West Virginia Department of Health and Human Resources (10/2019 to present)

- ✓ *Enterprise Data Services and Data Source Program (01/2020 to present).*
  Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
- ✓ *People's Access to Help (PATH) DDI Project Management (10/2019 to present).*
  Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.

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

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

Missouri Department of Social Services – *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (05/2013 to 07/2013).*
Jim conducted a systems architecture review of the MEDES reporting, including high level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM®'s systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

MetroSource, Corp. (1995 to 2012)

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

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

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

Xerox (05/2008 to 06/2009)

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

NYFIX, Inc. (01/2000 to 07/2006)

As vice president for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.

Karissa Durbin, PMP®
Subject Matter Expert, SMC

Years of Applicable Experience: 31

Education and Certifications

Associates, Data Processing/Accounting, Heald Business College

Project Management Professional®, Project Management Institute®

Karissa is a results-oriented and highly skilled CMS Streamlined Certification (SMC) expert with a proven track record in state agency and vendor roles. She has demonstrated expertise in helping ensure compliance with CMS Certification requirements and successfully leading solution vendor teams through the certification process. She utilizes exceptional leadership skills to oversee teams, educate stakeholders, and integrate certification tasks into project plans. She manages and organizes certification evidence and artifacts with precision and integrity, and she consistently aligns project deliverables with the certification timeline.

Key Qualifications

- ❖ Two years working on MECT/MECL during tenure at Public Consulting Group; two years utilizing MECT/MECL and OBC with Department of Health Care Services; and two years utilizing the SMC during her tenure with Nebraska
- ❖ 24 years working on Medicaid contracts with the largest being California Department of Health Care Services
- ❖ Over 20 years of project management experience, including project coordination
- ❖ Over 20 years of IT development and implementation experience
- ❖ 15 years in the healthcare / health and human services industry, including Medicaid Enterprise Systems (MES)
- ❖ 15 years' experience in MITA

Relevant Experience

BerryDunn (10/2023 to present)

Karissa is a subject matter expert in BerryDunn's Medicaid Practice Group.

Medicaid Streamlined Modular Certification (SMC) Consultant (10/2021 to 10/2023)

Karissa oversaw the Centers for Medicaid and Medicare (CMS) Streamlined Modular Certification (SMC) process for the Provider Management, Member Management and LTSS Modules, helping ensure adherence to regulations and standards. She collaborated with State CMS Certification Leads to meticulously prepare for the Operational Readiness Review (ORR) and Certification Review (CR), helping ensure successful outcomes. Karissa managed and documented the Intake form with appropriate evidence and deliverables, effectively supporting desired outcomes and metrics as well as the Conditions for Enhanced Funding (CEF), maximizing funding opportunities. She tracked and managed required Appendix C artifacts, helping ensure compliance with certification requirements. Karissa actively participated in Joint Requirements Design (JRD) sessions, contributing to the mapping of requirements to desired outcomes.

Department of Health Care Services (MESD) (03/2020 to 10/2021)

As a project manager, Karissa provided Centers for Medicaid and Medicare (CMS) certification management and oversight of all phases and activities related to projects within the DHCS Modernization Division. This involved utilizing a Hybrid Outcome Based Certification (OBC) approach. Karissa determined and managed the production of artifacts and OBC statements needed and worked with the business to determine the metrics/measurements that would meet the objectives of the business. She communicated and collaborated with the different divisions and agencies involved in certification to ultimately reach the goal of receiving CMS certification of the system.

Department of Health Care Services (MCOD) (06/2019 to 03/2020)

Karissa served as a project manager. She helped ensure the Division's operational needs were met related to the most complex analytical Quality Control activities. This involved providing technical assistance (researching, evaluating, and analyzing complex system and payment issues) to managed care health plans, as well as internal and contracted staff on Capitation Payment Management System (CAPMAN) related issues. Karissa helped ensure operational compliance by evaluating and assessing changes with all statutory, regulatory, contractual, and professional standards and requirements related to CAPMAN; independently evaluated any CAPMAN related impacts to provide guidance and direction for assigned special projects; and produced procedural documentation. She provided recommendations to management regarding improvement of the CAPMAN payment system and served as a lead to the Staff Services Analysts within the unit.

Public Consulting Group, Department of Health Care Services (MCOD) (06/2017 to 06/2019)

As a senior project manager/consultant, Karissa oversaw complex, high profile Managed Care projects, change requests and policy directives. This also included requirements gathering, analysis, project scope, quality control, defining communications and test strategies, facilitating stakeholder meetings, scheduling resources, developing data dictionary, and generating technical and user documentation and training guides. Karissa monitored data exchanges with external data trading partners including State and Federal such as CMS, Social Security, Medicare, Medicaid and CDSS (Social Services). She supported multiple policy changes to the Capitated Management System (CAPMAN). Karissa updated and maintained project documents and deliverables and maintained SharePoint sites for project documentation. She also had the opportunity of working on the California Medicaid Enterprise Certification project, as an IV&V consultant. This project required extensive knowledge of MITA and MECL and the ability to validate the requirements against the states proposals and documentation of new/replaced systems.

UC Davis Health System (07/2014 to 05/2017)

Karissa worked as a senior clinical liaison and project manager. She was responsible for leadership and contract oversight of the implementation of a new CAC (Computer-Assisted Coding) application and Imprivata single sign-on. She had full System Development Life Cycle (SDLC) duties, including requirements gathering, analysis, planning, initiation, executing, testing, implementation, training, monitoring, and lessons learned. Karissa facilitated stakeholder meetings, generated technical and user processes and procedures, training materials, and other deliverables.

Xerox, Department of Health Care Services (CA MMIS) (10/2010 to 10/2012)

As a senior consultant, Karissa developed and led a team of developers and analysts for transfer of the complex Medicaid Claims Erroneous Payment Corrections. She supported the takeover of CA-MMIS Medicaid Claims Processing Systems Contract and developed System Procedure Manuals and knowledge transfer guides and roadmaps. Karissa developed business requirements, data dictionary, generate technical and user documentation and training guides. She researched and documented alternative technical solutions and developed change requests and functional design documentation with technical specifications for technical staff and developers. Karissa updated and maintained file stores and project deliverables. She assisted with production of the functional design documents used by technical staff to produce technical designs from which system changes will be developed.

Eclipse Solutions, Department of Alcohol and Drug Program (HIPAA) (01/2008 to 06/2010)

Karissa served as a senior project manager and provided project management and oversight, utilizing the California Project Management (CA-PMF) Framework, HIPAA subject matter expertise, technical consulting, and building electronic data interchange claims files to the ADP Program HIPAA project director. She interacted daily with trading partners, internal stakeholders, and multiple other state departments, including Health Services, Mental Health, Office of HIPAA Compliance, and Counties.

Perot Systems (DELL), Catholic Healthcare West (10/2006 to 01/2008)

As a program manager, Karissa served as the PMO program and account manager for the delivery of services at Catholic Healthcare West (CHW). She managed the client relationship, including all service level agreements with Dell at an executive level and oversaw over 50 health care projects for Northern California, with a $30 million budget, including all aspects of budgets, full life cycle development, vendor management, and resource management. Karissa partnered with the Mercy Folsom chief financial officer to set the hospital budget for new technology and played a key role in the

decision-making process to determine feasibility, cost, and systemic value added, resulting in the purchase of the Nurse Call system, Responder NET. She directed five project managers with a shared pool of 20 resources, including four business analysts to deliver over 50 projects on time, within budget, and with minimal client disruption. Karissa had oversight helping ensure compliance with prescribed systems development life cycle processes using the Project Management Office (PMO) Framework and also assumed a principal executive leadership role for quality delivery of IT services at the client's facilities.

Electronic Data Systems, Department of Health Care Services (CA MMIS) (02/1992 to 10/2006)

Karissa served as a systems engineer and project manager and managed budget, resources, vendor resources, and full systems development life cycle development of multimillion-dollar projects to improve the capability of Medicaid to manage claims and comply with regulations. She adhered to the Project Management Institute® best practices and methods and CMMI (Capability Maturity Model Integration) standards. Karissa oversaw up to 40 resources, including business analysts, developers, architects, and quality assurance over projects including Medicaid Claims processing, HIPAA regulations, Y2K, children's health programs, senior services, managed care & point of service. She developed and managed all project/program documentation and document storage using LiveLink and led conversion of mainframe job scheduler software applications. Karissa implemented procedures for the Provider Enrollment Enhanced Picture System backfile conversion.

Kathryn Crumpton, Prosci® CCP
Subject Matter Expert, OCM

![BerryDunn logo]

Years of Applicable Experience: 10
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

Bachelor's, Business, Indiana Wesleyan University

Prosci® CCP

Kathryn is an experienced HHS and Medicaid project management professional, with a strong background in governmental social services policy and administration. She is a skilled analyst with expertise in all facets of the Systems Development Life Cycle (SDLC), including requirements mapping and development, business analysis, and organizational change management.

Key Qualifications

❖ Over 10 years of experience in specializing in organizational change management, communications, training, and documentation design and implementation

❖ Over five years' experience in HHS and Medicaid as a project management professional, with a strong background in governmental social services policy and administration

❖ Experience as a project management consultant, specializing in organizational change management, communications, training, and documentation design and implementation

❖ Collaborative expert in creating and managing teams, analyzing work plans, work streams, and aligning key, cross-functional, and project activities

❖ Experience successfully implementing software, including designing specifications and testing on a variety of project and platforms

Relevant Experience

BerryDunn (04/2022 to present)

Puerto Rico Medicaid Program (PRMP) (07/2023 to present) – *Federal Fiscal Year (FFY) 2023-2024 Enterprise Objective Monitoring and Control (EOMC) Services (10/2022 to present).*
Kathryn continues to serve as the Subprojects Service Area lead on the EOMC engagement and works as a senior business analyst on the Outcomes-based Procurement service area. Kathryn was the project manager for the Phase III Project Health Assessment that helped PRMP gain clearer insight into the project's status and to help identify any gaps, including risks and issues. The assessment focused on reviewing project performance against project goals and outcomes, key milestones, project and program management approaches, testing management, and certification efforts for key stakeholder groups including the system vendor, enterprise project management office (ePMO), program management office (ePMO), and PRMP.

West Virginia Bureau for Medical Services (BMS) – *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2022 to present).*
Kathryn is currently serving as a subject matter expert for the MES Modernization Strategy project, a project focused on the planning activities for an MES modernization strategy and procurement. The project will plan and estimate implementation costs for a modernized MES and aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA) goals

Missouri Department of Mental Health (DMH) – *Business Process Redesign and Organizational Development Project (06/2022 to present).*
Kathryn is serving as deputy project manager on this project to perform business process redesign for the Division of Developmental Disabilities and Division of Behavioral Health in preparation for procurement and implementation of an electronic health record solution for its state-operated facilities. BerryDunn is also developing solution requirements and a

scope of work for the vendor; leading organizational change management and organizational development activities; and developing process and outcomes measures and an associated monitoring plan.

Non-profit community-based behavioral health managed care organization (MCO) – *Organizational Design and Business Process Redesign. (04/2022 to 07/2022).*

For this MCO with over one million covered lives, Kathryn served as a subject matter expert on the BerryDunn team that partnered with the client on a redesign of their organizational structure, development of senior leaders, and performing associated activities, such as performing job impact analyses, developing career pathways, and updating job descriptions. In support of these redesign activities, the BerryDunn team provided a series of leadership development and staff development workshops and used instructional design methods to help the client develop and deliver staff training. BerryDunn also provided the client with OCM (including communications development and coaching) and project management support throughout the project.

NTT Data Services (09/2019 to 03/2022)

As organizational change management (OCM) manager, Kathryn served on Medicaid and Economic Assistance eligibility and their associated programs. Her primary responsibilities included managing all aspects of OCM for Medicaid Eligibility, based on all requirements set forth in the RFP. She collaborated with State and System Integrator teams in creating goals, timelines, deliverable expectation documents (DED), and project status reports. She reviewed and produced comment resolutions in finalizing OCM, training, communications, change impact, knowledge transfer, and roll-out plans. She conducted periodic reviews to help ensure the project was on track and conducted post-project reviews. She wrote and reviewed RFPs for release and associated requirement documents. She helped ensure all project documentation was kept up to date and communicated to the relevant stakeholders on a timely basis. She identified and communicated recommendations for allocating resources. She evaluated and implemented global best practices techniques to help ensure goal achievement. She influenced and managed continuous improvement of project/program process, practices and initiatives. She maintained in-depth awareness of industry trends, business conditions, and internal processes and practices to meet program delivery requirements. She led, directed, coordinated, and provided visibility into change management efforts to maximize the anticipated benefits, value or ROI of change, while minimizing the resistance of stakeholders. She promoted and provided ongoing coaching and mentoring about change management practices to leadership, stakeholder managers, and project managers to increase effectiveness in driving sustainable change. She performed quantitative assessment of change success and change adoption by soliciting feedback from stakeholders to determine the success of change management activities to help ensure behavioral changes align with strategic objectives.

NTT Data Services – Arkansas Department of Human Services (08/2018 to 08/2019)

As an information technology senior principal consultant and organizational change management (OCM) consultant, Kathryn was primarily responsible for documenting business processes for the State of Arkansas Integrated Eligibility System (ARIES). She was the track lead in Joint Architecture Design (JAD) sessions, performed detailed analysis, and created status reports on one or more program areas in preparation for implementing a new comprehensive case management solution by Next Gen (Deloitte solution). She identified approaches managing business requirements (RTM) by conducting extensive monitoring of the State's business process though research and discovery. She reviewed requirements for RFP for the State's procurement of case management system that supports its Medicaid, Long-Term Care, SNAP and TANF programs, WIC, and Disability and Waiver Services. She identified gaps and solutions by providing advice and support in evaluating the eligibility system solution and helped ensure it aligned with State policies and business processes. She collaborated with State and System Integrator teams in creating goals, timelines, deliverable expectation documents (DED), and project status reports. She ensured all project documentation was kept up to date and communicated to the relevant stakeholders on a timely basis. She identified and communicated recommendations for allocating resources. She influenced continuous improvement of project/program process, practices and initiatives.

As OCM consultant, Kathryn's OCM responsibilities included serving on an OCM team on numerous projects, primarily Medicaid and Economic Assistance eligibility and their associated programs. She reviewed requirements for OCM for Medicaid Eligibility, based on the RFP. She collaborated with State and System Integrator teams in creating goals, timelines, deliverable expectation documents (DED), and project status reports. She reviewed and produced comment resolutions in finalizing OCM, Training, Communications, Change Impact, Knowledge Transfer, and Roll-Out plans. She conducted periodic reviews to help ensure the project was on track and conducted post-project reviews. She reviewed RFP's for release and associated requirement documents. She ensured all project documentation was kept up to date

and communicated to the relevant stakeholders on a timely basis. She identified and communicated recommendations for allocating resources. She evaluated and implemented global best practices techniques to help ensure goal achievement. She influenced and managed continuous improvement of project/program process, practices and initiatives. She maintained in-depth awareness of industry trends, business conditions, and internal processes and practices to meet program delivery requirements. She led, directed, coordinated, and provided visibility into change management efforts to maximize the anticipated benefits, value or ROI of change, while minimizing the resistance of stakeholders. She promoted and provided ongoing coaching and mentoring about change management practices to leadership, stakeholder managers, and project managers to increase effectiveness in driving sustainable change. She performed quantitative assessment of change success and change adoption by soliciting feedback from stakeholders to determine the success of change management activities to help ensure behavioral changes align with strategic objectives.

Vector Consulting – Georgia Department of Human Services (10/2017 to 08/2018)

As the IES help desk analyst, Kathryn was primarily responsible for providing technological and help desk leadership for users of the Integrated Eligibility System for Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Medicaid, WIC, Energy Assistance and Childcare Assistance. She researched and documented system problems and procedures and provided problem resolution to user/customer and Division of Family and Children Services (DFCS) workers. She developed and wrote user updates for the systems. She completed analysis of State of Georgia help desk workflows to develop recommendations to improve call volume. These recommendations led to 40% call reduction for password resets and benefit renewals.

Circle Technologies (09/2014 to 10/2016)

✓ **Deloitte – Georgia/Kentucky Department of Health and Human Services** – *Integrated Eligibility System Project (09/2014 to 10/2016).*
As a business analyst, systems integration tester, and technical trainer for the Georgia Eligibility Integrated System for the State of Georgia developing instructor-led learning solutions and eLearning courses in Deloitte's Next Gen Software product, Kathryn was responsible for conducting training classes throughout the State of Georgia on a new software application for Food and Nutrition Services, Medicaid, and other service programs for over 1200 participants. She participated in the course curriculum development, learning objectives, and hands-on scenario-based exercises. She developed content of job aides, web-based training, help desk, and classroom materials utilizing Captivate. She supported software testing related activities throughout the Georgia Integrated Eligibility System (GA IES) development life cycle. She tracked issues utilizing the Requirements Traceability Matrix (RTM) spreadsheets and analyzed and developed business process solutions. She analyzed the need for Change Requests (CRs) and System Change Requests (SCRs) for the appropriate subsystems (utilizing Tracker and Clear Quest), in addition to monitoring the change through completion. She tested application functionality by analyzing software requirements, design specifications, and storyboards. Kathryn worked collaboratively with the testing team in the execution of over 3,000 deliverables for the GAIES project. She performed String testing, Graphical User Interface testing, System Integration, Interface, Conversion, Performance, Volume, Stress, and User Acceptance Testing. She performed specialized testing for 508 Cross Browser Testing utilizing JAWS for Windows (testing for federal compliance for persons with disabilities). She used color contrast checker to analyze webpage colors to verify the contrast and help ensure better accessibility. She evaluated results against requirements and expected results to assess system accuracy and deliverable milestone completion. She recorded defects and coordinated resolution with test leads, development team leads, and Subject Matter Experts (SMEs). Kathryn coordinated testing activities with test team members and assisted in troubleshooting technical/environmental issues. She created test deliverables/test scripts in accordance with the Master Test Plan and Deliverable Expectations Document (DED) criteria. She participated as part of the IV&V team that was responsible for tracking issues utilizing Requirements Traceability Matrix (RTM) spreadsheets, analyzed and developed business process solutions, and analyzed the need for change requests (CRs) and system change requests (SCRs) for the appropriate subsystem in addition to monitoring the change through completion. She reviewed vendor system test scripts for accuracy and participated in consortia User Acceptance Testing (UAT).

Katie Gray, MBA, PMP®
Subject Matter Expert, HIE and PgMO

Katie is a senior consultant in BerryDunn's State Government Practice Group with 20 years of experience in healthcare administration, health information technology (HIT), interoperability, and data analytics. Katie has national expertise in clinical and public health data ecosystems, measurement, privacy, and compliance. Katie is experienced in project proposal and project management, specializing in federal and state health technology.

Years of Applicable Experience: 15
Years of Relevant Experience Supporting PRDoH & PRMP: 2
Education and Certifications

MBA, School of Business, Simmons University

BA, Gender and Cultural Studies, Simmons University

Augsburg University, Center for Global Education and Experience, Minneapolis, Minnesota

- Latin America Program, Mexico and Guatemala Study Abroad, University of Cordoba, Cordoba, Spain
- Language and History Program, Study Abroad

Lean Six Sigma Green Belt, University of Southern Maine

Certified Project Management Professional®, Project Management Institute®

Key Qualifications

- ❖ Over 10 years' experience in HIE leadership, operations, and technology services delivery
- ❖ Over five years in SME role while working for the Maine state HIE (HealthInfoNet), supporting Maine Medicaid Agency in data analytics and reporting for utilization management services and public health reporting
- ❖ Experience leading health information services company, excelling in private and public clinical data interoperability and software development
- ❖ National advisor for social determinants of health data interoperability and data governance

Relevant Experience

BerryDunn (12/2021 to present)

Puerto Rico Department of Health (PRDoH) – *HIT/HIE Support Services (12/2021 to present).*
Katie is serving as deputy program manager to assist PRDoH with planning and implementation of an HIE (Health Information Exchange). Services provided by the BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities and other support such as developing Advanced Planning Documents (APDs) to request funding from Centers for Medicare & Medicaid Services (CMS) and PRDoH's State Medicaid Health IT Plan (SMHP).

Ohio Mental Health and Addiction Services (OhioMHAS) – *Electronic Health Record (EHR) Integrator Project (05/2023 to present).*

Katie is currently serving as the project manager for this project to provide oversight, management, and support to OhioMHAS and its EHR vendor Epic Systems Corporation implementation across Ohio's six state run psychiatric hospitals. The BerryDunn team participates in the core project activities, reviews vendor deliverables, performs project governance, performs risk and issue management, and multiple organization assessments including current state, change readiness, and performance metrics in support of a successful best practice EHR implementation.

Connecticut Department of Administrative Services/Bureau of Enterprise Services and Technology (DAS/BEST) – *Child Support Enforcement Independent Verification and Validation (IV&V) (01/2023 to present).*

Katie is currently serving as a business analyst for this project to provide IV&V periodic reviews for Connecticut's implementation of a new child support enforcement system. The BerryDunn team is observing project activities, reviewing vendor deliverables, documenting findings, and providing recommendations for correcting any weaknesses identified during the semi-annual reviews.

Alaska Department of Health (DOH) – *Health Information Exchange (HIE) Planning and Procurement (01/2022 to 09/2023).*

Katie served as subject matter expert for this project to assist DOH with re-procuring HIE services and associated technologies. The BerryDunn team performed an initial high level assessment to gain an understanding of the vision, needs, and desires for the future HIE to inform requirements and Request For Proposal (RFP) development, performed market research to understand available vendors, solutions, and technologies in the marketplace, defined HIE business and technical requirements, developed an RFP using the Best-Value process, provided oversight for the solicitation process, and provided post-solicitation services, such as vendor onboarding and ongoing contract management/quality assurance.

HealthInfoNet & Cureous Innovations (2013 to 06/2021)

As Director of Client Operations and Programs and compliance officer, Katie led the health information services company excelling in private and public clinical data interoperability and software development. Katie was accountable for client operations, contract development and execution, R&D grant development, and project oversight. She was an advisor in data capture and aggregation for state, public health, private healthcare strategy, research, eCQI, value-based payment outcomes, and predictive analytics. Katie was responsible for partnership and contract management, business operations and development, and advisor and program development. Her primary responsibilities for each category are listed below:

✓ *Partnership & Contract Management.*
Katie established and grew over 15 new partners per year, managing a total of 200 organizational partnerships across Maine's healthcare delivery systems, community health centers, and community-based organizations averaging $5 million in revenue per year. Katie successfully project directed four complex multiyear, multi-million, state and federally funded technology innovation grants in partnership with executives from Centers for Medicare and Medicaid Innovation (CMMI) and Health Resources and Service Administration (HRSA) with a focus in rural health and technology integration. Katie transitioned grant projects into an average of $1 million in recurring revenue contracts with DHHS and the Veterans Affairs Administration. She sponsored five to eight multiyear information technology projects per year to help ensure technical specialists aligned with clinical strategy and public health goals. These projects delivered a suite of health information technology (HIT) core services and products ranging from patient record aggregation and access and patient-level predictive analytics to software implementations.

✓ *Business Operations & Development.*
Katie led product design for functional clinical workflow across predictive analytics products and contracts. She led the partnership with health venture capital start-up (HBI Solutions, Inc.) to test and implement a new software solution for population health management for ACOs and care management services. After six years of successful implementation and sustainable user adoption, HealthInfoNet is now building its own suite of analytics services to complement HBI's predictive analytics solution and continue the partnership. Katie hired and led the company's first team to execute client outreach for new learning models in clinical education and technology support. She achieved average annual growth of 60% in clinician adoption for six consecutive years. She coached and promoted entry level staff to project managers and team leaders. Katie managed data privacy

compliance as designated by Maine state and federal law. She wrote company SOPs related to privacy and operations to comply with legal requirements. She wrote and led policy implementations for CMS hospital requirements for HIT.

✓ *Advisor & Program Development.*
Katie led three statewide steering committees across DHHS, community organizations, healthcare providers, and patients to advance data collection and analysis efforts to inform policy decisions and legislative acts such as value-based care contracting programs. She advised Maine's Department of Health Human Services (DHHS) on Medicaid (MaineCare) grant steering committees for children's health and innovation grants (2013-2018). Katie advised DHHS on statewide data collection and reporting for COVID-19 vaccination, treatment, and testing. Katie was the project director grantee for four years of the Robert Wood Johnson Foundation Data Across Sectors for Health (DASH) program. She successfully secured highly competitive annual funding to assess, advise, test, and implement community-based solutions to advance health data equity in complex social ecosystems. She consulted for multiple State Medicaid programs, community health collaboratives, and ACOs in data management strategies for DASH. Katie was a conference and webinar speaker for DASH as a health data expert. Katie was also project director for two statewide community-planning projects with funding from the Maine Health Access Foundation (MeHAF) to design patient choice for health data exchange. Katie presented at MeHAF as a national expert in patient choice and health data.

MaineGeneral Health (2007 to 2013)

As health system Administrative Director, Katie's primary responsibilities included being accountable for operations, staff management, and physician partnerships and the executive leadership team of a large community healthcare delivery system. She was responsible for market service lines related to Primary Care, Geriatrics, Women's Health, and Urgent Care. Katie designed and operated large outpatient care facilities, including the new Alfond Center for Health. As a member of quality and policy committees for the system, Katie led quality, compliance, and policy standards for the Physician Administration division that were implemented across all Physician Practices. Katie integrated care management services and workflows to improve transitions of care. She increased gross revenue by 10% annually ($50M revenue budget) while decreasing operational expenses by 5% ($40M expense budget) over two years. Katie grew new Urgent Care revenue by over 50% within the first three years of operations while decreasing Emergency Department utilization of low acuity patient visits by 8%. These new practices increased growth by 22% in two years. Katie recruited and retained high-demand middle management positions. Katie was accountable for 50 medical staff positions and 180 staff FTEs.

Kevin Chartrand, MBA, CPHIMS, PMP®, SAFe PO/PM
Subject Matter Expert, Enterprise Governance

Years of Applicable Experience: 23 (IT) 16 (HHS)
Years of Relevant Experience Supporting PRDoH & PRMP: 3

Education and Certifications

MBA, University of California at Davis Graduate School of Management

BS, University of Pittsburgh

Project Management Professional®

Certified Professional in Healthcare Information Systems (CPHIMS)

Certified in Information Technology Infrastructure Library (ITIL)

AWS Certified Cloud Practitioner

TensorFlow Developer Professional

Machine Learning Certification

Health Informatics Certification

Kevin specializes in strategic planning and business planning specializing in Health and Human Services and Public-Sector IT. He brings years of experience in strategy and planning, full life cycle procurement planning and support including quality assurance / independent verification & validation; requirements development; data management and analytics; financial and competitive analysis; program and project management; process, benefits, and asset modeling; web and systems development; operations management; business development; and business case and strategy development for government and commercial IT.

Key Qualifications

❖ 15 years' experience performing in program management and strategic planning domains across nearly 20 states and territories

❖ 15 years' experience performing the role of subject matter expert across the country and for over two years for PRMP

❖ 20+ years IT development and implementation experience

❖ 15 years in the healthcare / health and human services industry, including Medicaid Enterprise Systems (MES)

❖ 15 years' experience in MITA, including designing and running MITA State Self-Assessments

❖ 10+ years' experience providing IV&V and project oversight, health assessment, and audit services

Relevant Experience

Chartrand LLC (06/2021 to present)

Kevin supports national consulting groups in their projects with state and territorial clients. Client projects include:

BerryDunn – Puerto Rico Medicaid Program Medicaid Enterprise System Program.
Served in several roles including PgMO Support Director, Solution Architect, Portfolio Advisor, IMES Team Lead, Outcomes-based Procurement Team Lead, and others. Was a specialist for BerryDunn's support of PRMP's program-based approach to the MES, outcomes life cycle management, MES Roadmap definition and management, and other focus areas.

✓ Definition of the PgMO, Executive Steering Committee, and PgMO Support function

✓ Development and maintenance of the MES Roadmap

✓ Development of the Program Management Roadmap

✓ Development of the MES Outcomes Management Plan

✓ Tailoring of the procurement approach to be outcomes-focused

- ✓ Updating of the MITA State Self-Assessment methodology to be outcomes-focused in alignment with the CMS approved Investment Management Toolkit
- ✓ Procurement of 5+ contracts, several that were outcomes-based
- ✓ Introduction of standardized project reporting to the PgMO
- ✓ Implementation of MES performance dashboards

BerryDunn – Iowa Medicaid Enterprise Modernization Effort (MEME).
Kevin is a core team member for the strategic planning of the MES, including definition and implementation of the #EpicShift principles. Was a primary architect of the outcomes-based strategic planning effort.

Intervision – California Department of Health Care Services Medi-Cal Program.
Enterprise Architect focused on defining the MES Modernization Roadmap through IT Product Delivery (ITPD), and developing a performance management approach for Streamlined Modular Certification outcomes-based projects

SPM Research Group, home of TransformHHS (10/2019 to present)

As founder and CEO, Kevin leveraged his experience as a strategic consultant for state HHS agencies to develop an online platform that allows states to share planning and execution information with each other, manage their communications with CMS and other stakeholders, and manage their own MES program from defining their roadmap to developing their APDs to monitoring and reporting their performance metrics. He led a pilot with five states in partnership with Elena Nicolella of NESCSO. Now open to all states, tHHS Insights (tHHS' first product) now houses over 10,000 documents, focusing on contract, procurement and APD documentation. Kevin also serves on the CMS MITA Governance Board, MITA NextGen Redefinition Working Group as a M**edicaid and MITA Subject Matter Expert.**

Elyon Enterprise Strategies, Inc. (01/2020 to 01/2022)

Kevin worked as the senior director and led the "Elyon 2.0" practice, crafting and creating foundation and stabilizing capabilities, structures, and processes and designed and led the strategic planning and acceleration plans for the group for rapid growth. He also led Elyon's initiative to prepare the firm for large-scale growth including implementation, configuration and administration of Salesforce as a business development platform, standardizing collaborative workspaces and processes, and leading strategic growth initiatives. Through Salesforce Kevin extended core objects; developed and implemented new and third-party objects for recruiting, onboarding, and project tracking; established role-base dashboarding and reporting; and trained staff on optimal use. The Salesforce org was credited with supporting an immediate three-fold increase in proposal volume, with a significant increase in quality. His project delivery included:

- ✓ Engagement Manager, primary Subject Matter Expert, MITA Document Specialist, and Advance Planning Document (APD) development lead for the State of California Department of Healthcare Services (DHCS)
- ✓ Engagement Manager and Subject Matter Expert for the State of California Department of Justice IT Strategic Planning / Agency Information Management Strategy (AIMS) project
- ✓ Medicaid and HHS Subject Matter Expert for State of North Dakota Department of Human Services GOTS to COTS Feasibility Assessment
- ✓ HHS Subject Matter Expert for State of Oklahoma Department of Health Implementation Project Health Check
- ✓ Engagement Manager for two concurrent Franchise Tax Board systems implementation / upgrade projects
- ✓ Engagement Manager for Oregon Higher Education Coordinating Committee (HECC) Stage Gate 2 Planning

Gartner Consulting (07/2008 to 10/2019)

As a senior director, Kevin was the engagement lead for Gartner's state, federal and local health and human services clients covering strategic planning, program and project management establishment, full procurement life cycle, quality assurance / IV&V, and business analysis. At the 2014 Medicaid Enterprise Systems Conference, Kevin presented with a client, "Using the MITA SS-A to Align Procurements with Your Future State" discussing successes in leveraging the national standard to develop client-oriented and business-driven system procurements that is easily understandable by vendors. Example work includes:

- ✓ Developed Gartner Consulting's Medicaid Information Technology Architecture (MITA) State Self- Assessment (SS-A) Methodology, Approach, Collaboration tool, and Artifacts which was used on all SS- A's performed while at Gartner

- Facilitated MITA State Self-Assessments for the State of Connecticut Department of Social Services and Vermont Agency of Human Services in support of a strategic MITA roadmap for the Agency. Developed interview and analysis tools, identified strategic intra-Departmental initiatives, and managed disparate groups of stakeholders to achieve a complete modernization roadmap

- Engagement manager and key resource for the strategic planning process for the Delaware Health Information Network, a national leader in Health Information Exchange

- Engagement manager and key resource for the development of the Federal Integrated Advance Planning Document (IAPD) for Tennessee Department of Human Services' Enterprise Systems Modernization, including Child Support Enforcement; Supplemental Nutrition Assistance Program (SNAP); Temporary Assistance for Needy Families (TANF); Child Care and other TDHS programs and services; development of the go-to-market procurement strategy

- Project managed and contributed to the strategy development and quality assurance and independent verification and validation (QA / IV&V) for the County of San Diego Health and Human Services Agency Knowledge Integration Project, and adaptation of the Accountable Care Organization for communities and local governments

- Project managed and developed the value creation and financial sustainability models for the Statewide HIE for the State of Connecticut Department of Public Health, and for the State of Arkansas Office of Healthcare Information Technology. This model included a review of system and organization costs based on local and national industry trends, calculation of quantifiable value-based on state-specific healthcare metrics, and recommended detailed immediate and near-term, and potential long-term funding strategies

- Developed an extensive IT scenario-based cost model for a large national commercial healthcare client, including definition of current/future cost drivers. The model provided a seven-year view of a multibillion- dollar IT department and included extensive metric projections based on known IT drivers matched with company-specific and industry guided cost drivers. The model provided both detailed expectations of cost in specific IT 'towers' as well as executive-ready budget projects and predictive analytics with adjustable sensitivity analyses

- Developed the State HIE Strategic and Operational Plans for the State of Connecticut Department of Public Health. The 190-page plan included a deep understanding of the status of HIT in the State as well as guidance for the future of EHR adoption through the development of an HIE in the State. The project was completed with large amount of interaction between Gartner, the Department of Public Health, the Department of Social Services (Medicaid) and the assigned Regional Extension Center

- Developed the SMHP and IAPD detailing Medicaid EHR Incentive Program requirements and strategy for the State of Connecticut Department of Social Services. This project further enhanced communication and collaboration between the three Federal grantees for HIT in the State and harmonized the collaboration to help ensure the most effective development of HIT in the State

Maggie Anderson, MS
Subject Matter Expert, Spenddown, SPA, MFP, and Policy

Years of Applicable Experience: 20
Years of Relevant Experience Supporting PRDoH & PRMP: 2
Education and Certifications

MS, Management, University of Mary

BS, Food and Nutrition, North Dakota State University

Maggie has more than 30 years' experience working in state government with federally funded social services and child nutrition programs. During her 14 years of experience as a Medicaid Director, Maggie was a hands-on director and developed extensive knowledge of Medicaid statute, regulations, and operations and actively participated in creating and updating Medicaid state plan amendments and 1915(c) waivers. Maggie is proficient at facilitating sessions with stakeholders, including Medicaid members, providers, tribal government representatives, legislators, and advocacy organizations. Maggie is also skilled at preparing and presenting expert testimony and reports to state legislators. She has a passion for home and community-based services (HCBS) and worked to expand HCBS options for beneficiaries and to find creative ways to serve individuals in unique circumstances. Maggie also served as the director of the umbrella agency in which Medicaid was located and therefore brings a broad perspective of how various programs (such as Child Welfare, Vocational Rehabilitation, and Aging Services) can be partnered with Medicaid for the benefit of beneficiaries.

Key Qualifications

- ❖ 34 years of experience interpreting federal laws, regulations, and guidance to implement programs and lead operations, including 20 years specific to Medicaid
- ❖ 14 years' experience as Medicaid Director, including nearly five years serving in a dual role as Medicaid Director and Executive Director of the umbrella human services agency with a biennial budget over $3 billion and a statewide staff of approximately 2,000 individuals
- ❖ Extensive Medicaid state plan and 1915(c) waiver experience
- ❖ Proficient at facilitating sessions with stakeholders, including Medicaid members, providers, tribal government representatives, legislators, and advocacy organizations
- ❖ Skilled at preparing and presenting expert testimony and reports to state legislators

Relevant Experience

BerryDunn (11/2021 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (11/2021 to present)*.
As part of the BerryDunn team in Puerto Rico, Maggie provides Medicaid policy analysis and state plan support. This work involves researching federal law and regulation as well as CMS documents, both present and historical, to assist Puerto Rico in supporting their Medicaid program goals. Maggie serves as a subject matter expert on the Puerto Rico team and has assisted the client with numerous state plan amendments, policy white papers, support during calls with CMS, and ad hoc requests.

Maggie was lead on writing a Money Follows the Person Demonstration Grant for Puerto Rico, which was awarded in 2022. She continues to serve as a subject matter expert to review project documents for the demonstration project.

West Virginia Bureau for Medical Services (BMS)

✓ *Substance Use Disorder (SUD) Waiver Initiative Project (11/2021 to present).*
Maggie provides subject matter expertise support. Her activities include the review of documents prior to their delivery to the client. In addition, she provides ad hoc support to client requests related to legislative activity or client requests for program changes or enhancements.

✓ *State Plan Review and Support (SPRS) Project (11/2021 to present).*
Maggie provides subject matter expertise support. Her activities include the review of state plan amendment packages and policy documents prior to their delivery to the client. In addition, she provides ad hoc support to client requests related to legislative activity or client requests for program changes or enhancements.

North Dakota Department of Human Services (08/2005 to 05/2019)

Maggie worked as the Director of Medical Services Division responsible for the administration of the Medicaid Program, Medicaid Expansion, the Children's Health Insurance Program, and Autism Spectrum Disorder services. She also served in the dual capacity as both Executive Director and Medicaid Director from August 2012 to December 2016. As the Executive Director, Maggie was responsible for all programs within the umbrella agency: Medicaid; the Children's Health Insurance Program; Economic Assistance Programs including Child Care Assistance, the Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families (TANF), and the Low Income Home Energy Assistance Program; Child Support; Aging Services; Children and Family Services; Vocational Rehabilitation; Developmental Disabilities Services; Behavioral Health Services; and Field Services, which includes the State Hospital, the Developmental Center, and eight regional human service centers.

During her tenure, Maggie had the opportunity to lead an effort to appeal a CMS disallowance to the Departmental Appeals Board (DAB). As part of this effort, Maggie researched relevant DAB appeals, statutes, and regulations and was responsible for preparing briefs and follow-up communication with the DAB.

North Dakota Department of Human Services (02/2003 to 08/2005)

Maggie served as the Deputy Director of Medical Services to assist the Division Director with program administration and budget development and oversight. She served as the business lead for the work leading up to the procurement of a Medicaid Management Information System.

United States Department of Agriculture (08/1989 to 02/2003)

Maggie administered the Child Nutrition Programs in the Department of Public Instruction. She was responsible for the administration and oversight of the various USDA Child Nutrition Programs. Maggie was hired as a Child Nutrition Specialist and was promoted to Assistant Director during tenure.

Margaret Walker, CPA
Subject Matter Expert, APD

Years of Applicable Experience: 28
Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

BS, Accounting, Western Kentucky University

Certified Public Accountant, State Of Tennessee, License #11334

Association Of Government Accounting, Former President, Nashville Chapter

Tennessee Government Finance Officers Association, Member

American Institute of Certified Public Accountants

Margaret is an experienced controller with financial reporting, and operational expertise. She brings a healthcare background with an emphasis in Medicaid and a proven record of success. Margaret has an ownership mentality and reputation for delivering the highest quality strategic solutions and propelling business forward.

Key Qualifications

- ❖ 12 years' experience developing APDs and providing financial oversight over the APD process for a large State Medicaid Agency
- ❖ 14 years' experience working in a large State Medicaid Agency or as a BerryDunn consultant in an APD SME role, developing and delivering APD solutions
- ❖ 26 years' experience as experience controller with financial reporting and operational expertise
- ❖ Healthcare background with emphasis in Medicaid

Relevant Experience

BerryDunn (01/2022 to present)

Margaret provides state Medicaid agencies and territories with consulting and management advisory services related to Medicaid financing strategies for Medicaid Enterprise Systems activities. She provides services related to planning, design, development, implementation, and operations of Medicaid systems as well as formulating funding strategies for system activities. She also serves as a financial subject matter expert on Medicaid activities, including federal financial reporting, single audit issues, Uniform Administrative Requirements for federal grants, cost allocation, allowable costs, and federal and state legislative developments pertinent to the healthcare landscape. Margaret works with clients to streamline existing business processes to modernize and create efficiencies and resource savings for Medicaid organizations.

Metropolitan Nashville and Davidson County Government Department of Finance, Division of Accounts (09/2020 to 01/2022)

As assistant chief accountant, Margaret supervised a staff of 17, including three managers. She led the preparation of the Comprehensive Annual Financial Report; worked to identify areas for business process improvement and develop action plans to implement change; assisted staff with solving complex accounting issues and offer solutions; and served as a liaison with senior-level financial managers across the local government and assist them with technical accounting

questions. Margaret also conducted routine research on financial reporting issues relative to GASB pronouncements, federal regulations, and applicable state and local legislative requirements.

TennCare (04/2007 to 11/2019)

As the controller, Margaret was responsible for all aspects of accounting and financial reporting for the $12 billion annual operating budget for Tennessee's Medicaid program. She led the accounting team of 30 individuals, including four accounting directors and five accounting managers by directing daily accounting operations and strategic financial initiatives and driving these initiatives forward. Margaret was responsible for financial oversight of the Advance Planning Document (APD) submission process and actively participated in the collaborative effort to submit APD's on behalf of the SMA including offering subject matter expertise on APD financing and federal reporting matters. Margaret also implemented and maintained a strong system of internal controls in finance and accounting operations to help ensure compliance with policy and procedure and create operational efficiency. She was responsible for the preparation of financial statements, monthly and yearly financial closing, accounts receivable billing and collections, payroll, cash flow projections, ERP system, general ledger accounting transactions, managed care and claims payments, and other key areas of accounting operations for a large healthcare entity. In addition, she managed $8 billion in federal Medicaid funds and was responsible for Managed Care payments, federal financial reporting and federal financial compliance for federal funds.

Tennessee Division of Accounts (08/1998 to 04/2007)

As the assistant director of financial reporting, Margaret worked on the preparation of the State of Tennessee Comprehensive Annual Financial Report; assisted with global aspects of financial statement preparation to include the preparation of both fund level and entity-wide financial statements, note disclosures, RSI, MD&A, statistical information, and final review of document; performed research on GASB technical pronouncements to help ensure financial statements were free from material misstatements; completed GASB technical research on upcoming pronouncements on an as needed basis; and served as a liaison with external auditors.

Tennessee Secretary of State, Division of Fiscal and Administrative Services (09/1991 to 08/1998)

Margaret supervised staff of 11 accounting employees in the areas of cash receipts, payroll, procurement, disbursements, and federal grant reporting. She was responsible for internal audit activities of 12 regional library facilities funded with federal funds, performed site visits to each facility and issued audit reports to the Secretary of State, and worked as a liaison with the external auditor on all audit issues.

Tennessee Comptroller of the Treasury, Division of State Audit (06/1989 to 09/1991)

Margaret conducted financial and compliance audits of state governmental entities with primary emphasis in state agency audits. This included performing the single audit of these agencies. She supervised staff of four to six auditors, issued audit reports in accordance with GAO auditing standards, and audited in accordance with federal cost principles of allowability, currently found codified in 2 CFR 200.

Marianne Ringel, MS, MPP
Subject Matter Expert, Policy Program

Years of Applicable Experience: 30
Years of Relevant Experience Supporting PRDoH & PRMP: 2
Education and Certifications

M.S. Computer and Information Science, University of Pennsylvania, Moore School of Engineering

M.P.P. Public Policy Analysis, University of Pennsylvania

B.A. Psychology, Yale University

Marianne began working as a subcontractor with BerryDunn in 2011, providing consulting and subject matter expertise on a variety of Medicaid, CHIP, and healthcare reform projects. She has over 30 years in the healthcare policy world, focusing on Medicaid for most of that time. She served as the Policy Director and Acting Deputy Director for Maine's Medicaid program, leading the division that wrote coverage and reimbursement regulations and state plan amendments as well as multiple federal waivers, working with experts, providers, and beneficiaries to develop policy. In Puerto Rico, she works primarily with the SPA team but also has provided support to MFP, PERM, MMIS, Procurement, and IMES. Other consulting experience includes program integrity work and claims system development.

Key Qualifications

- ❖ 30 years of experience in the areas of policy analysis, healthcare reform, planning, financial analysis, and management and leadership for state government HHS initiatives
- ❖ Served as Maine's Special Assistant to the Governor on legislative and financing initiatives related to implementing and coordinating the State's health activities, with emphasis on the Dirigo healthcare reform plan
- ❖ Experienced with Puerto Rico SPAs with an emphasis on MCO services
- ❖ Experience with developing RFPs, MES Roadmaps, and Money Follows the Person (MFP) for Puerto Rico
- ❖ Served as the primary liaison with federal representatives related to policy issues
- ❖ Six years as Maine Medicaid Policy Director; directed and wrote coverage and reimbursement state plan amendments, policies, and waivers
- ❖ Over 10 years providing consulting support in multiple states, including ACA implementation focusing on eligibility expansion, claims system development, and substantive update eligibility and provider policy

Relevant Experience

BerryDunn Projects (2011-2016, 2021 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (01/2021 to present)*.

Marianne serves as a subject matter expert for the Puerto Rico SPA team, focusing on the development of service coverage state plan amendments. She supports the team in areas including federal requirements and supports client interactions with CMS. She served as the lead on the state plan gap analysis project. Marianne also helped draft the PRMP eligibility manual. Marianne co-authored the successful MFP grant application and continues to support that team as a SME.

Marianne has also supported other BerryDunn workstreams in Puerto Rico. She helped write the RFP for the MMIS phase III and supports the MMIS team to help ensure their work aligns with policy initiatives. She has also worked as part of the PERM team and helped draft both the program management and MES Roadmaps as part of the IMES team.

Independent Consulting (2005 to present)

Client projects include:

- ✓ Working with Analytica as Project Director for the State Medicaid Program Integrity Review contract with the Centers for Medicare and Medicaid Services (CMS); duties included staffing the project, acting as primary CMS liaison, supervising reviewers and helping ensure quality work product including draft reports and follow-up inquiries to states as well as overseeing subcontractor work
- ✓ Assisting West Virginia Medicaid, Children's Health Insurance Program (CHIP) and Insurance Commission with a variety of projects including healthcare reform implementation, focusing on planning for an Exchange under the ACA, eligibility expansion, claims system development, and reviewing and conducting substantive update of eligibility and provider policies
- ✓ Working with Connecticut Medicaid to modernize its hospital reimbursement system, improve primary care provision, and research social determinants of health, including development of various issue papers
- ✓ Assisting Maine Medicaid with managed care, transportation, and hospital reimbursement policies
- ✓ Co-authoring 200-page paper for the Medicaid and CHIP Payment and Access Commission (MACPAC) analyzing Medicaid federal authorities

Dirigo Health Agency (2008 to 2011)

Marianne served on the Board of Trustees and was appointed by the governor and confirmed by the legislature. This agency implemented Maine's healthcare reform initiative.

Konbit Sante, Cap Haitien Health Partnership (2007 to 2010)

As a program specialist, Marianne was primarily responsible for development, management, and evaluation of programs for this NGO supporting the public healthcare system in Northern Haiti. She was responsible for drafting grant proposals and reporting. She traveled regularly to Haiti to support programs including clinical and management initiatives.

Mitch Darrow, GPEN
Subject Matter Expert, Security

Years of Applicable Experience: 34
Years of Relevant Experience Supporting PRDoH & PRMP: 3
Education and Certifications

BS, Mechanical Engineering, Iowa State University

GIACC Certified Penetration Tester (GPEN)

GIACC Certified Penetration Tester (GPEN)

Mitch is a manager with 25 years of experience in business system analysis, database design, system architecture, network administration, and design engineering. He has provided leadership on technology projects to measure, analyze, and improve performance issues, training and development, and project coordination as well as strategy and planning for information technology projects related to human services. He joined BerryDunn in 2014 after 14 years with Sappi Fine Paper North America. Mitch has been a GIACC certified penetration tester since 2019.

Key Qualifications

- ❖ 25 years of IT experience
- ❖ Direct experience with state Medicaid agencies and systems
- ❖ Experience with completing MARS-E assessments in IN, MN, MO, NM, and WV as well as PR
- ❖ GIACC Certified Penetration Tester (GPEN)

Relevant Experience

BerryDunn (06/2014 to present)

Puerto Rico Medicaid Program (PRMP)

- ✓ *Independent Security and Privacy Controls Assessment MMIS (07/2020 to 09/2020; 01/2023 to present).* BerryDunn performed an independent third-party assessment of security and privacy controls in place over the PRMP Medicaid Management Information System (MMIS).
- ✓ *MARS-E Security Assessment (11/2020 to 04/2021; 12/2022 to 05/2023).* BerryDunn performed an independent assessment of the security and privacy controls of the Puerto Rico Eligibility and Enrollment System using CMS' MARS-E 2.0 and 2.2 controls framework.

Metropolitan Government of Nashville and Davidson County, TN

- ✓ *Information Security Program Development (05/2016 to present).* Mitch is responsible for completing an annual risk assessment based around NIST 800-53 rev. 4 moderate controls.
- ✓ *Water Services Penetration Test (06/2021 to 12/2021).* Mitch completed a penetration test of the Metro Water Department.
- ✓ *Water Services Security Assessment (04/2018 to 10/2018).* Mitch provided a security assessment of the Nashville, TN Water Services Department Process Control Systems (PCS) and network security controls.
- ✓ *IT Assessment of Davidson County Sheriff's Office (04/2017 to 10/2017).* Mitch conducted Criminal Justice Information Services (CJIS) security audit for the County Sheriff's Office.

Glynn County, GA – *Independent Security Assessments (08/2022 to 12/2022).*
Mitch performed a cybersecurity risk assessment for the County, using the National Institute of Standards and Technology (NIST) Cyber Security Framework (CSF).

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

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

Missouri Department of Social Services, Missouri HealthNet Division

- ✓ *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (10/2021 to 05/2022).*
  Mitch conducted NIST 800-53 R5 independent security risk assessments.

- ✓ *Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP) ISA (01/2016 to 09/2016).*
  Mitch conducted NIST 800-53 R4 independent security risk assessments for the Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP).

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

City of Scottsdale, AZ

- ✓ *Ransomware Readiness Assessment (01/2023 to 06/2023).*
  Mitch assessed the City's capabilities to respond to a ransomware event following the NIST CSF. Additionally, an incident response tabletop exercise was also developed and conducted.

- ✓ *Wireless Network Security Assessment (01/2022 to 05/2022).*
  Mitch performed a vulnerability assessment of the enterprise wireless network and evaluated security controls pertaining to: wireless network architecture, encryption, configuration management, access management, and monitoring.

- ✓ *Security Assessment (12/2020 to 04/2021).*
  The City Auditor's Office engaged BerryDunn to perform an IT cybersecurity audit to evaluate the effectiveness of the City's network security controls.

City of Phoenix AZ Auditor's Department

- ✓ *Water Department Security Assessment (11/2021 to 04/2022).*
  Mitch conducted a security assessment of the City of Phoenix (City) Water Services Department Process Control Systems (PCS) and network security controls.

- ✓ *IT Asset Management Audit (06/2020 to 03/2021).*
  Mitch conducted an assessment of the City's IT Asset Management (ITAM) practices.

- ✓ *Database and Server Security Assessment (06/2019 to 11/2019).*
  Mitch conducted a security assessment of City database and server administration practices.

Minnesota Department of Employment and Economic Development (DEED) – *Audit, Risk Assessment, Technical Review, and Security Review of Unemployment Insurance (UI) Strategic Program (06/2021 to 01/2022).*
Mitch conducted security assessment of Minnesota DEED User Interface (UI) Strategic Modernization Program.

Minnesota Information Technology Services – *Independent Security and Privacy Controls Assessment (04/2018 to 06/2018; 03/2019 to 06/2019; 01/2020 to 05/2020; 01/2021 to 05/2021).*
Mitch conducted an annual independent assessment of the security and privacy controls of the Minnesota Eligibility Technology System (METS) using CMS' MARS-E 2.0 controls framework.

Minnesota Department of Labor and Industry (MN DLI) – *Workers' Compensation Modernization Program Assessment/Audit (07/2020 to 05/2021).*
Mitch conducted a security assessment of Minnesota WCMP. He performed a security system readiness assessment and system testing which included: configuration testing, vulnerability testing, web application testing, and penetration testing.

West Virginia Department of Health and Human Resources – *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 08/2017; 08/2020 to 02/2021).*
Mitch conducted an annual independent assessment of the security and privacy controls of the West Virginia Eligibility and Enrollment System using CMS' MARS-E 2.0 controls framework.

Alaska Division of Legislative Audit – *Exam of Alaska's Resource for Integrated Eligibility Services (ARIES) General and Application Controls (06/2019 to 10/2019).*
Mitch conducted an IT controls audit of the State's Health and Social Services system associated data warehouse.

Indiana Department of Family and Social Services – *Independent Security and Privacy Controls Assessment (03/2019 to 06/2019).*
Mitch provided an independent assessment of the security and privacy controls of the Indiana Eligibility Determination Services System (IEDSS), using CMS' MARS-E 2.0 framework.

West Virginia Bureau for Medical Services

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

- ✓ *Gap Analysis and Project Management Services (08/2017 to 06/2018).*
  This project was an effort to measure and remediate compliance with the ACA in West Virginia across the Medicaid Enterprise.

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

City of Philadelphia, PA – *Criminal Justice Information Systems (CJIS) Active Directory Audit (08/2015 to 12/2015).*
Mitch conducted Criminal Justice Information Services (CJIS) security audit of Active Directory.

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

Nikki Welch, LSSBB, Prosci® CCP
Subject Matter Expert, OCM

Nikki Welch is a senior consultant in BerryDunn's Higher Education Management and IT Consulting Practice. She helps clients identify, implement, and execute business improvement strategies through applied innovation, process redesign, change management, and people development. With a background in project management and operational effectiveness, Nikki helps clients adapt and grow by leveraging multiple methodologies and tools, including Lean Six Sigma, various project management approaches, Prosci® Change Management, IDEO Design Thinking, Entrepreneurial Operating System® (EOS®), and tailored methodologies to achieve success.

Years of Applicable Experience: 18
Education and Certifications

Certified Lean Six Sigma Black Belt (LSSBB)

Prosci® Certified Change Practitioner (CCP)

Key Qualifications

❖ Over 18 years of operational leadership experience with a focus on applied organizational effectiveness, change management, and operational effectiveness to achieve objectives and implement sustainable results

❖ Works collaboratively with cross-functional teams and stakeholders at all levels to create a shared purpose, vison, and frameworks that foster and support a culture of change agility and continuous improvement

❖ Achieves significant benefits realization through key project initiatives

Relevant Experience

BerryDunn (2022 to present)

As a senior consultant in the Management and Information Technology Group, Nikki serves clients and the team by providing independent, objective consulting services that address challenges associated with subject matter expertise in operational excellence and effectiveness, organizational change management, and project/program management. She applies practical knowledge in overlaying business process improvement, change management, and project management methodologies to customize solutions for maximum effectiveness. She partners collaboratively with cross-functional teams and stakeholders to evaluate current state, develop strategic plans, and implement/execute same to deliver key outcomes that help clients create, grow, and protect value.

✓ She served as Organizational Change Management (OCM) Advisor and Communications Lead for the Minnesota State NextGen Project, implementing Workday in Finance and Human Capital Management across 33 Colleges and Universities.

✓ She consults on OCM Effectiveness for the University of Wisconsin System ATP.

The EcoPlumbers (2021 to 2022)

As the Continuous Improvement Manager, Nikki developed, implemented, and served as Lean Six Sigma coach/project leader on large cross-functional process improvement projects. She conducted Kaizen events, trained and mentored Lean Six Sigma Belt candidates through all stages of development, including candidate selection, established the Operational Excellence business unit, and served as organizational/operational effectiveness leader on the senior leadership team to drive strategy throughout the organization. Nikki also:

✓ Worked directly with CEO, CTO, and key stakeholders to create and execute Lean Six Sigma/Continuous Improvement, Project Management, and Change Management frameworks

✓ Collaborated with team members to realize 20% efficiency gains throughout the Customer Experience business units

- ✓ Identified over $2M in operational waste due to inefficiencies through direct leadership of 16 major initiatives while supporting over 30 additional initiatives

Grange Insurance (2015 to 2017)

As the Commercial Lines Lean Process/Standard Work Leader, Nikki worked collaboratively across the enterprise helping ensure key initiatives and strategies were identified and executed, focusing on reduction of non-value activities/expenses while increasing efficiency, engagement, and profitability. She served as business owner/facilitator on Kaizen events, continuous improvement training, and cross-functional project teams, and she coached Lean Six Sigma Green/Black Belt candidates, sponsors, and champions. Nikki successfully:

- ✓ Improved Commercial Lines (CL) operational excellence by $1M annually through execution of 20+ initiatives by identifying inefficiencies through data, designing/implementation of control plans, and visual management systems
- ✓ Reduced expenses by $350K through development of SharePoint project prioritization and utilized tools to evaluate and recommend key strategic initiatives with impact/ROI analysis to leadership for implementation

Grange Insurance (2013 to 2015)

As the Commercial Lines Operations Manager, Nikki performed direct management and oversight of a multi-functional operations team helping ensure project, productivity, time service, quality, and customer service metrics were met or exceeded. She created and managed operational excellence and budget through project, process, tool, procurement, and vendor management. She also served as business unit owner on project teams.

Nationwide Insurance (2012 to 2013)

As Project Management Specialist, Nikki managed projects and processes through all stages, from opportunity analysis through execution, for the Strategic Workforce Management shared services team. She recognized improvement opportunities and provided strategic process/project recommendations and interim business unit daily management as necessary.

Nationwide Insurance (2010 to 2012)

As a Consultant, Call Center Operations, Nikki managed incoming call volume/service levels, daily business operations, projects, and processes through all stages, from opportunity analysis through execution, for the Claims Call Center business unit. She provided short- and long-term tactical planning and execution of work force management and staffing needs based on business and consumer indicators. She recognized improvement opportunities and provided strategic process/project recommendations. She also created, implemented, and delivered Workforce Management/Operations training.

- ✓ Nikki realized first year ROI of $1.5M in call center staffing expense reduction through creation and implementation of Flex Scheduling in Claims Call Centers.

Nationwide Insurance (2007- 2010)

As Senior Trainer, Nikki managed the training, development, and auditing of new hires, CSRs, and trainers/quality analysts. She collaborated on, created, and delivered training curriculum and led and participated in projects within the change management and operational teams.

Robert Morey, MHR, CHCO, CPM
Subject Matter Expert, Enterprise Governance

Robert is a senior consultant in BerryDunn's State Government Practice Group. Robert has over 26 years of experience working in various data governance positions, including program manager, data privacy/security, and enterprise data strategy with the Office of Management and Enterprise Services, State of Oklahoma Department of Health, Office of Juvenile Affairs, and Department of Human Services. Robert is a National Accreditation Auditor and Certified HIPAA Compliance Officer with demonstrated success in reviewing organizational operations, providing data driven outcomes, and developing IT programs.

Years of Applicable Experience: 20+
Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

Master of Human Relations, University of Oklahoma

BA, Psychology, University of Oklahoma

Certified HIPAA Compliance Officer (CHCO)

Certified Public Manager (CPM)

Key Qualifications

- ❖ 12 years of Data Governance experience
- ❖ Six years' experience as Data Governance Program Manager and Department Director; primary duties included oversight of Oklahoma Department of Health Data Governance Program and Program Oversight for all state agencies at OMES
- ❖ 10 years' experience working with a large State Medicaid Agency including claims processing, APDs, master data management, and care coordination projects
- ❖ Eight years of Enterprise Governance experience
- ❖ Over 20+ years of Data Privacy and Security experience
- ❖ 10 years for Data Strategy experience
- ❖ 10 years of Strategic Planning experience
- ❖ Eight years of Enterprise Roadmap Development experience
- ❖ Eight years for Enterprise Data Analytics experience
- ❖ Eight years of Enterprise IT Governance experience
- ❖ 15 years of Policy and Standards development experience
- ❖ 15 years for Standards Compliance and Auditing experience

Relevant Experience

BerryDunn (06/2022 to present)

Washington Health Care Authority (HCA) – *Institutions of Mental Disease (IMD) Waiver Health Information Technology (HIT) Implementation Requirements Strategic Planning (05/2023 to present).*
Robert is serving as a subject matter expert for the HCA IMD Waiver HIT implementation requirements strategic planning project. Key activities include research of background documentation, developing project information requests, information gathering through visioning and discovery sessions, and developing an IMD Waiver HIT Requirements Strategic Plan and Roadmap.

Alaska Department of Health (DOH) and Division of Public Health (DPH) – *Data Modernization and Informatics Initiative Strategic Planning (09/2022 to present).*
Robert is serving as a subject matter expert for the DOH and DPH data modernization and informatics strategic planning project. Key activities include leading discovery sessions and peer state interviews and the research of data governance frameworks. In addition, other activities include supporting information gathering through web surveys and developing a Data Modernization Plan, Workforce Development Plan, and Informatics Strategic Plan.

Alaska DOH and Department of Family and Community Services (DFCS) – *IT Governance Needs Assessment and Roadmap Development (08/2022 to present).*

Robert serves as a subject matter expert for the Alaska IT Governance project. Key activities include providing team support, participating in discovery sessions and peer state interviews, and supporting the development of a Needs Assessment and IT Governance Roadmap.

Puerto Rico Department of Health (PRDoH) – *Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (05/2022 to present).*

Robert is serving as the data governance subproject lead for the Puerto Rico data governance foundational development, which includes the following activities: developing a data governance roadmap, establishing a data governance steering committee, creating a data governance guide document for regulatory and compliance requirements, developing a data governance maturity assessment matrix and a data quality framework, and supporting the establishment of key data policies/standards.

Mississippi Department of Human Services (MDHS) – *Legacy Systems Assessment Request for Proposal (RFP) Development (08/2022 to 10/2022).*

Robert served as a subject matter expert in the development of RFP for DDI and DDI-SI services. Activities included the development of the Delivery Expectation Document (DED), support for development of a regulatory interface, and technical/functional requirements.

Office of Management & Enterprise Services (08/2020 to 06/2022)

Robert worked as a Data Strategy & Governance Manager to supervise the Enterprise Data Governance and State Data Strategy Programs. The department operations included Data Governance Program, Meta-Data Management, Data Quality, Data Architecture, Master Data Management and establishing the enterprise data strategy. He worked on the Google Cloud Platform as the DASH Platform Administrator responsible for implementation of state data strategy, including enterprise data sharing, state universal ID, and Master Data Management solution.

Oklahoma State Department of Health (10/2016 to 08/2020)

✓ **Interim Director of Informatics** *(03/2020 to 08/2020).*
   Robert served as Interim Director of Informatics to provide oversight and supervision of department staff and operations including Master Person Index, Health e-Oklahoma, Data Governance Program, HIPAA Privacy & Security, Interoperability, and Interagency Data Agreements. He reviewed and approved all hardware, software, and network infrastructure purchases as well as serving as Chair for the ITOC to review and track all IT projects/enhancements.

✓ **HIPAA Privacy and Security Program Manager** *(10/2016 to 03/2020).*
   Robert served as enterprise privacy and security consultant, responsible for the Data Governance Program, Data Use Review Committee, data classification, and risk assessments. He conducted audits and risk assessments of security and privacy practices to help ensure compliance with national standards. Robert was responsible for initiating, facilitating, and promoting activities to foster privacy and security awareness within the organization. He also acted as liaison to Oklahoma State Board of Health, IRB, county health departments, and community partners. He reviewed and approved all Business Associate Agreements, Data Use Agreements & Data Sharing Agreements. Robert was responsible for Office of Civil Rights complaints, investigations, and OSDH responses to privacy and security incidents.

Office of Juvenile Affairs (10/2002 to 07/2016)

✓ *Director (12/2012 to 07/2016).*
   Robert served as Director of the Institutional Services Division (ISD) responsible for division contracts, budgeting/procurement process, state and federal grants, and other funding streams. He established and maintained agency and facility rules and procedures while supervising employee related activities such as recruitment, retention, training, discipline, and performance management processes. He acted as chief spokesperson and advocate to the legislature, community and corporate partners, Board of Juvenile Affairs, municipalities, stakeholders, educators, and public. He developed and implemented IRS data management system to collect, validate, analyze, and report all incidents.

- ✓ *Support Services Operations Supervisor (09/2007 to 12/2012).*
  Robert was the State Coordinator for American Correctional Association (ACA), Performance-based Standards (PbS), and HIPAA Privacy and Security. He supervised four Program Managers and oversaw activities in nine agency programs, including OJA Administrative Rules & Agency Policy/Procedure, Worker's Comp Program, Risk and Safety Management, Inventory Management, Support Services Procurement, Fleet Management, and agency communication services.

- ✓ *Privacy and Security Program Manager/Policy Supervisor (10/2002 to 09/2007).*
  Robert was responsible for the agency HIPAA Privacy and IT Security Program. He established security and privacy risk assessments to help ensure full compliance with state and federal standards. He developed and maintained all OJA administrative rules, policy and procedures, and he helped ensure compliance with APA, state, and federal laws. Robert also performed annual ACA audits on juvenile institutions and field offices and oversaw the Institutional Policy Taskforce & Community Services Division Policy Taskforce regarding legislative directives.

Terry Bequette
Subject Matter Expert, SMC

Terry is a skilled professional technical consultant and executive with a unique combination of skills and experience appropriate to the challenges of advising or leading a Health Information Technology organization. He has in-depth experience in implementing state-based aspects of the Health Information Technology for Economic and Clinical Health (HITECH) Act through productive interactions with Office of the National Coordinator (ONC) and Centers for Medicare and Medicaid Services (CMS).

Years of Applicable Experience: 14

Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

Master of Science in Operations Research, Columbia University

Bachelor of Science in General Engineering, University of Illinois

Key Qualifications

- ❖ 14 years' experience supporting HIE activities and funding APDs; 12 years' experience providing procurement support; and five years of MES certification
- ❖ Four years' experience as State HIT Coordinator for Vermont, implementing the EHR incentive program, writing the first state Medicaid HIT Plan, and generating several APDs
- ❖ Over 13 years of project leadership experience on large and highly complex HHS projects and programs
- ❖ Demonstrated ability to analyze project requirements and develop strategic solutions to meet agencies' needs
- ❖ Extensive experience providing highly technical and specialized guidance to help agencies solve complex problems
- ❖ Excellent leadership, executive decision-making skills, and judgments
- ❖ Strong experience applying relevant subject matter principles and methods to project solutions
- ❖ Excellent management experience, including organizational development, process improvement, budget preparation and results, strategic and tactical planning, and project management

Relevant Experience

BerryDunn (04/2020 to present)

Puerto Rico Department of Health (PRDoH) – *Health Information Technology (HIT)/HIE Support Services (04/2020 to present).*
Terry is serving as a subject matter expert and analyst for this project to assist PRDoH with planning and implementation of an HIE. Services provided by the BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities and other support such as developing Advanced Planning Documents (APDs) to request funding from Centers for Medicare & Medicaid Services (CMS) and PRDoH's State Medicaid Health IT Plan (SMHP).

Alaska Department of Health (DOH) – HIE Planning and Procurement (08/2021 to 9/2023).
Terry served as an HIE SME for the BerryDunn team supporting DOH in re-procuring HIE services and associated technologies. The BerryDunn team performed an initial high level assessment to gain an understanding of the vision, needs, and desires for the future HIE to inform requirements and Request For Proposal (RFP) development, performed market research to understand available vendors, solutions, and technologies in the marketplace, defined HIE business and technical requirements, developed an RFP using the Best-Value process, provided oversight for the solicitation

process, and provided post-solicitation services, such as vendor onboarding and ongoing contract management/quality assurance.

Health Information Technology, Exchange and Transformation (03/2014 to present)

Terry is a consultant offering expertise based on his experience in a State Government setting as the HIT Coordinator for the State of Vermont. Terry works with state government agencies to develop a portfolio of HIT-related projects and oversees their implementation in a context of reform for Medicaid care delivery and payment models.

Department of Vermont Health Access (DVHA) (09/2010 to 03/2014)

As State HIT Coordinator and Associate State HIT Coordinator, Terry was responsible for implementing many aspects of the HITECH Act. In these roles, Terry wrote and obtained CMS approval for the State Medicaid HIT Plan and subsequently for the Implementation Advance Planning Document, which provided the funding for Vermont's Medicaid EHR Incentive Program (EHRIP). Additionally, he designed and launched the EHRIP in Vermont, including education and outreach, website and materials, provider portal software system implementation, and processes and procedures for validating provider attestations for incentive payments. While at DVHA, Terry operated and administered the EHRIP with limited support from October 2011 through May of 2012 when additional staff were hired, and he spoke at the 2011 VITL (Vermont Information Technology Leaders, Inc., the State of Vermont's designated entity for health information exchange) Summit on the topic of the incentive program. He presented on the topic of the incentive program and Meaningful Use to the Bi-State Primary Care Association.

As a result of Terry's efforts, through March of 2014, the EHRIP program awarded incentive payments totaling $31,000,000 to hospitals and eligible professionals in Vermont and New Hampshire. (On a per capita basis, Vermont's program is the second highest result to date). Other significant responsibilities and achievements while with DVHA included:

- ✓ Prepared and submitted quarterly and semi-annual status reports for the Office of the National Coordinator; these reports covered progress on e-prescriptions, lab connectivity to the HIE (Health Information Exchange), EHR connectivity to the HIE, transactions through the HIE, and progress with Public Health efforts to update the Immunization Registry via the HIE, and to prepare for reportable lab results and syndromic surveillance reporting; worked closely with VITL staff to determine appropriate and accurate data and information to include in these updates

- ✓ Negotiated the 2014 DVHA Grant Agreement with VITL and administered this grant

- ✓ Established a small grant program, which he administered, to identify the gaps and corresponding solutions to adding additional provider types to the integrated HIT environment as it developed in Vermont; these providers, which we referred to as full-continuum providers, include mental and behavioral health, home health, substance abuse, and long-term and post-acute care providers; awarded grants to the Vermont Council of Development and Mental Health Services that deliver mental health services as Designated Agencies for the Department of Mental Health to the Vermont Assembly of Home Health Agencies (VAHHA) and to the Vermont Health Care Association (VHCA) whose members represent more than 90 licensed nursing home, residential care homes and assisted living facilities in Vermont

- ✓ Prepared the State's 2012 Strategies and Operational Plans (SOP) document, required by the Office of the National Coordinator (ONC) and which represents the State's HIT Plan at the national level; this document identifies the plans and goals for many of the activities VITL undertakes as the State's HIE, and there was much collaboration with VITL staff in the document's development; the document also identifies work required to help ensure privacy and security requirements; updated this plan in 2013 and wrote final summary and evaluation reports in 2014 as part of closing out the grant

- ✓ Participated in the ongoing strategic alignment and tactical implementation work undertaken by the Division of Health Reform in its role of coordinating and guiding the overall enterprise activity associated with the many healthcare reform initiatives currently underway

- ✓ Consulted as invited, facilitated, and documented use cases applying HIT to specific care delivery situations; these cases included proposed models for better care coordination where methadone and buprenorphine are appropriate responses to opiate substance abuse (a DVHA initiative) and modeling the transitions of care for scenarios involving movement from hospital to extended or long-term care facility to home (with DAIL, the Department of Aging and Independent Living)

Eugene Water & Electric Board (EWEB) (1998 to 09/2010)

As manager of information services, Terry was responsible for IT strategic planning, Enterprise Architecture and Project Portfolio Management. Terry was also responsible for end-user computing support, asset management and software licensing; network services, telecommunications, data center operations and security; application development and support; data management and corporate warehouse; geographic services, including CAD and GIS developments; office systems (physical security, billing operations, mail distribution, copy center, reception, corporate library); and budget development and results. Under Terry's leadership, EWEB was consistently rated as exceeding expectations.

Terry's significant achievements in this role also include effectively managing a staff of 52 managers, supervisors, and IT technical staff, with a budget of $10,000,000.

City of Corvallis, Oregon (1997 to 1998)

As MIS Division Manager, Terry was responsible for end-user computing support; asset management and software licensing; network services, data center operations, and security; budget development and results; and system analysis and support for major City departments (including Library, Fire Department, and Police.). In this role, Terry developed a model of assigning IT staff to specific City of Corvallis Departments for dedicated support; facilitated the IS Steering Committee, an inter-departmental group appointed to prioritize IT projects and approve the IT budget; and developed a model for allocating IT costs to the various city departments. Additionally, he facilitated the Parks and Recreation Department through an organizational change initiative and initiated an IT strategic planning process.

R.R. Donnelly & Sons Co., Financial Printing Group (1989 to 1995)

As Director of Technology, Terry was responsible for technology planning, development, and implementation. In this role, Terry led the planning team for an Integrated Information System Plan and subsequently led the implementation project; negotiated joint venture and other strategic alliances on behalf of the Group, including investment and operating agreements with companies in Great Britain and Israel; directed an international network operating under our own file management software (28 locations, all major domestic and foreign financial centers); and directed software application development for the creation and management of financial printing documents, including page layout software.

Additional achievements include:

- ✓ Developed major portions of the Group's five-year plans and made major presentations to senior Donnelley management and several significant financial clients, including Standard & Poor's and Merrill Lynch
- ✓ Managed a staff of 50 managers, supervisors and developers in Illinois and Pennsylvania
- ✓ Developed and managed annual operating and capital budgets

Vanessa Maybury, MBA, CFE, PMP®
Subject Matter Expert, Certification and Compliance Program

Vanessa is a senior manager in BerryDunn's Consulting Services Team and co-leads the Compliance and Risk Management group. She serves as the lead analyst, project manager, and audit manager on projects specializing in audit and financial compliance. Vanessa's focus is verifying compliance; internal controls reviews; financial process improvement; fraud investigations; and programmatic, IT control, and forensic auditing. She has strong planning and managing skills as well as a detailed understanding of accounting and financial procedures of government agencies.

Key Qualifications

❖ Nine years of compliance and risk management consulting
❖ Certified Fraud Examiner (CFE)
❖ Project Management Professional® (PMP®)
❖ Master of Business Administration (MBA)

Years of Applicable Experience: 9
Years of Relevant Experience Supporting PRDoH & PRMP: 2
Education and Certifications

MBA, concentration in Business Analytics, Bentley University, McCallum Graduate School of Business

BS, Business Administration, concentration in Accounting, minor in Sociology Service Learning, Bryant University

BS, Business Administration, concentration in Accounting, minor in Sociology Service Learning, Bryant University

Certified Fraud Examiner (CFE)

Relevant Experience

BerryDunn (09/2014 to present)

Puerto Rico Department of Health – *EHR Promoting Interoperability Program Audit (05/2021 to present).*
Vanessa is managing BerryDunn's team that is providing expertise and assistance in performing a Medicaid EHR Promoting Interoperability Audit. BerryDunn's team helped develop an audit strategy, provider training, risk assessments to identify a sample selection, and conduct both desk and field audits of an identified sample selection. Vanessa is very knowledgeable with the program guidelines and specific rules set by CMS.

West Virginia Bureau of Medical Services (BMS) – *EHR Provider Incentive Payment (PIP) Audit (09/2014 to present).*
Vanessa is serving as the engagement manager on BerryDunn's team that is providing expertise and assistance in performing annual Medicaid EHR PIP Audits. As a part of this team, she oversees the development of the audit strategy and risk assessments to identify the sample selection. She also communicates with providers and hospitals, and both desk and field audits of an identified sample selection.

Star of Hope – *Forensic Accounting Services (12/2019 to present).*
Vanessa is leading the review of accounting records and assists the client with verifying contract compliance of an affiliate

organization. The review includes review of royalty payments, expenditures, third-party payments, and reconciliation of accounting records.

State-Based Health Insurance Exchange – *Programmatic and Financial Audits (2015 to present).*
Vanessa is on a team that has executed programmatic audits for seven SBEs, which includes Rhode Island, Massachusetts, Minnesota, Nevada, Pennsylvania, Vermont, and Washington. BerryDunn also performs financial audits for Nevada, Rhode Island, Vermont, and Washington. The programmatic audit assesses compliance with federal requirements associated with 45 CFR 155. The financial audit portion follows GAAP and Yellow Book standards.

Maine Attorney General's Office

✓ *Agreed-Upon Procedures Review for Cigarette Sales (07/2022 to 11/2022).*
Vanessa was project manager reviewing cigarette and roll your own (RYO) distributor sales in Maine to confirm compliance with State tobacco laws and regulations. BerryDunn reviewed sales reports, invoices, and product directories for a sample of tobacco distributors.

✓ *SOH and Estate Agreement Review (10/2021 to 11/2021).*
Vanessa was project manager on the project that helped identify inconsistencies between contracts / agreements and accounting support. BerryDunn also assisted with preparing responses to information requests from the Attorney General.

Missouri Division of Accounting – *Overtime Pay Review (10/2021 to 12/2021).*
Vanessa led the team in the review of employee payroll and compensatory time during the pandemic and calculated payments in accordance with FLSA.

Metropolitan Government of Nashville and Davidson County (Metro), TN Office of Internal Audit (OIA)

✓ *Investigation of Nashville General Hospital (10/2020 to 11/2021).*
For this engagement, Vanessa led interviews regarding allegations related to billing and potential fraud. BerryDunn reviewed the allegations and performed testing in order to reach conclusions on the validity of the allegations.

✓ *Program Audit and Monitoring Services (05/2019 to 01/2020).*
For this engagement, Vanessa provided a review of purchasing and contract compliance of construction vendor contracts within the County.

Maricopa County, AZ Internal Auditor's Department

✓ *Procurement Audit (02/2021 to 06/2021).*
This audit included a review of the procurement of the election system and related equipment. Vanessa led the review of the procurement practices to assess compliance with county requirements and related policies and procedures.

✓ *Audit of the Sheriff's Information Management System (03/2019 to 05/2019).*
Vanessa served on BerryDunn's team providing internal audit support for Maricopa County Sheriff's Office Bonds, Fine, and Court Order Processing.

Alaska Division of Legislative Audit (DLA)

✓ *General Controls / Application Controls Examination (03/2016 to 06/2021).*
Vanessa led BerryDunn's team, assisting DLA in the examination of the IT general controls and application controls related to Alaska's IRIS and ALDER. DLA used the results of the review in planning the audit of the State's financial statements and single audit for fiscal years 2016, 2017, 2018, 2019, 2020, and 2021.

✓ *Exam of Alaska's Resource for Integrated Eligibility Services (ARIES) General and Application Controls (05/2019 to 10/2019).*
Vanessa led BerryDunn's project to conduct an examination of the IT general controls and application controls related to ARIES.

City and County of Denver, CO Auditor's Office – *Audit of M/WBE/DBE Program (01/2020 to 06/2020).*
Vanessa led a performance audit of the Denver Economic Development and Opportunity Division of Small Business Opportunity M/WBE/DBE program. This engagement included interviews, document review, and testing and resulted in a report with findings and recommendations. The audit was conducted in accordance with U.S. General Accountability Office's Government Auditing Standards.

Colorado Department of Human Services (DHS) – *Operational, Financial, and Account Review of Automated Support and Enforcement Processes and System (02/2018 to 06/2018).*

Vanessa was a lead analyst assisting DHS in modernizing its financial system and reconciliation process within the Colorado Automated Support and Enforcement System (ACSES). Vanessa was responsible for documenting the current reconciliation process, leading testing activities, and creating a report outlining project results. She also assisted the team in providing recommendations to the State in hopes of modernizing its current approach.

West Virginia Bureau for Medical Services (BMS) – *Disproportionate Share Hospital (DSH) Payment Audit (03/2016 to 12/2016).*

Vanessa led BerryDunn's team that was providing audit services to the State's DSH program. Vanessa was involved in planning, coordinating, and assisting in conducting audit procedures. The audit procedures included both desk and field audit processes as well as hospital outreach.

Children and Family Services of New Hampshire – *Forensic Accounting Services (10/2016 to 12/2016).*

Vanessa was a lead analyst in providing Forensic Accounting Services to Children and Family Services of New Hampshire, a non-profit organization. She led on-site interviews and document review activities. The project included drafting initial findings as well as preparing a final audit report.

City of Alexandria, VA – *Review of Community-Based Mental Health and Substance Abuse Services (07/2015 to 02/2016).*

Vanessa was a lead analyst for the City's Community Services Board (CSB), which oversees the use of public funds to provide mental health, intellectual disability, and substance abuse services through the Department of Community and Human Services (DCHS). BerryDunn reviewed the CSB's processes for third-party billing to identify opportunities to improve the effectiveness of identifying and collecting revenues from third-party sources, submitting and monitoring pre-authorization requests to third-party pay sources, and management and determination of patient payment responsibilities, including co-payments, co-insurances, and deductibles. Vanessa performed data analysis and reviewed documents to help ensure compliance with federal and state regulations. BerryDunn developed a report of recommendations to assist DCHS with the implementation of a more sustainable and efficient process.

Yoko McCarthy, MBA, CFE, CGFM, CISA
Subject Matter Expert, Certification and Compliance Program

Yoko is a principal in BerryDunn's Consulting Services Team. She co-leads the Compliance and Risk Management practice, which focuses on compliance assurance services. Yoko has assisted various states and municipalities to strengthen their internal controls to protect their resources from waste, abuse, and fraud and to improve operational efficiency while maintaining compliance. Prior to joining BerryDunn in 2012, Yoko worked for the Massachusetts State Auditor's Office for nine years.

Key Qualifications

- ❖ Over 20 years of auditing experience
- ❖ Certified Information Systems Auditor (CISA)
- ❖ Certified Fraud Examiner (CFE)
- ❖ Certified Government Financial Manager (CGFM)

Years of Applicable Experience: 20

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

MBA, specializing in Finance, Information Systems, and Supply Chain Services Management, University of Massachusetts

BA, Economics, Kobe College, Hyogo, Japan

Certified Fraud Examiner

Certified Government Financial Manager

Certified Information Systems Auditor

President-elect of the AGA Boston Chapter

Member of the Association of Certified Fraud Examiners, AGA, Association of Local Government Auditors, and ISACA

Relevant Experience

BerryDunn (10/2012 to present)

Puerto Rico Department of Health – *Medicaid/CHIP Eligibility Determination Review (11/2021 to present).*
Yoko led the BerryDunn team reviewing accuracy of Puerto Rico Medicaid Program (PRMP) eligibility determinations and recertifications, as well as capitation payments, on a sample of Medicaid and Children's Healthcare Insurance Program (CHIP) beneficiaries.

State-Based Health Insurance Exchange – *Programmatic and Financial Audits (2015 to present).*
Yoko oversees the team that provides the annual programmatic audits for 10 state-based health insurance exchanges (HIXs), which includes California, Kentucky, Maine, Massachusetts, Minnesota, Nevada, Pennsylvania, Rhode Island,

Vermont, and Washington. BerryDunn also performs financial audits for Kentucky, Maine, Nevada, Rhode Island, Vermont, and Washington. The programmatic audit assesses compliance with federal requirements associated with 45 CFR 155. The financial audit portion follows GAAP and Yellow Book standards. Over the past several years, our team has helped our HIX clients navigate a variety of policy changes enacted because of the COVID-19 pandemic.

Colorado Office of State Auditor

- ✓ *Performance Evaluation of CO Dept of Health Care Policy and Financing's Recovery Audit Contractor Program (08/2023 to present).*
  Yoko is serving as a project principal for evaluation of Colorado Recovery Audit Contractor Program. The BerryDunn team is evaluating compliance and performance of RAC program.

- ✓ *Marijuana Inventory Tracking Data Evaluation (03/2019 to 09/2019).*
  Yoko served as a lead auditor on an evaluation of the Colorado Department of Revenue's (DOR) administration of the marijuana industry to identify opportunities for the DOR to better leverage and use marijuana inventory tracking data to inform, direct, and target the DOR Marijuana Enforcement Division's (MED) inspection and enforcement activities and the DOR Tax Division's audit activities. Yoko helped assess to what degree they have proper controls in place to minimize the risk of tax evasion and the diversion of marijuana products to illegal markets.

Massachusetts Essex County District Attorney's Office – *Compliance Assessment (10/2022 to 12/2022).*
Yoko led the BerryDunn team conducting an independent assessment of internal controls, policies and procedures, financial activities and accounts for the Essex County District Attorney's office.

Town of Blackstone, MA – *Operational Assessment (10/2021 to 07/2022).*
Yoko led the BerryDunn team reviewing and evaluating risks and efficiencies of the town's key processes, including Accounts Payable, Accounts Receivable, Cash Management, Payroll, Purchasing, Tax Titles, and Tax Assessment. The team assessed the efficiencies of the current processes, identified opportunities for improvement, and made recommendations.

Missouri Department of Social Services (DSS) – *Financial Reviews of Residential Treatment Facilities (06/2021 to 02/2022).*
Yoko was a lead on a project to review case files of over 40 different residential treatment facilities that serve the DSS' child welfare program. Yoko reviewed records and assessed whether the facilities complied with state requirements and properly billed the DSS for the services they provided to children under their care.

Metropolitan Government of Nashville and Davidson County Internal Auditor's Office

- ✓ *Performance Audit of Community Foundation of Middle Tennessee (12/2022 to present).*
  Yoko is leading the BerryDunn's team conducting performance audit of an non-profit organization, Community Foundation, on behalf of the Metro internal audit.

- ✓ *Investigative Services of Nashville General Hospital (11/2020 to 12/2021).*
  Yoko led the BerryDunn's team conducting an investigation of certain matters related to allegations regarding Nashville General Hospital.

- ✓ *Agreed-Upon Procedures (05/2019 to 02/2020).*
  Yoko led BerryDunn's team conducting agreed-upon procedures on risk areas concerning procurement and compliance with policy related to contracts with selected Metro vendors. She conducted a review of vendor selection processes, vendor contract requirements, billing, invoices, and Metro's vendor management procedures through document reviews, testing, and on-site interviews.

Maricopa County, AZ Internal Auditor's Department

- ✓ *Review of the Maricopa County Adult Probation Department – Victim Services (05/2022).*
  BerryDunn performed a review of the Department's compliance with Arizona Code of Judicial Administration requirements, department policies, and department conformance with best practices in the area of victim services.

- ✓ *Internal Audit of County Sheriff's Office Bonds, Fine, and Court Order Processing (02/2019 to 05/2019).*
  Yoko led BerryDunn's team assisting the Maricopa County Internal Auditor's Department with the risk assessment and other planning activities. Her team conducted audit fieldwork testing and assessed whether the SIMS Division shift schedule provided adequate supervisory oversight and training resources and whether policies and procedures and other applicable rules and regulations were consistently adhered to.

✓ *Independent Assessment of IAD Recorder's Office Election Process (09/2018 to 11/2018).*
Yoko led BerryDunn's team providing an independent assessment of the County Recorders Office's processes for planning and executing Election Day activities for the 2018 primary election.

North Carolina Pandemic Recovery Office (NCPRO) – *ARPA Grant Management (11/2021).*
Yoko was a compliance subject matter expert helping NCPRO establish a compliance process for over $5.4 billion in ARPA grants. She has participated in meetings with the internal auditors and state auditors to understand the current audit and compliance environment and what steps we should take to help ensure compliance with ARPA requirements.

Missouri Office of Administration, Division of Accounting – *Overtime Pay Review (10/2021 to 12/2021).*
Yoko led the team as an engagement manager to verify whether comp time was calculated and paid accurately in accordance with the Fair Labor Standards Act (FLSA) in relation to pandemic hazard pay.

New Hampshire Liquor Commission – *Audit Readiness and Business Process Improvement (06/2017 to 12/2020).*
Yoko led the BerryDunn's team to provide process improvement and audit readiness services. The team reviewed the current processes and procedures in place to prepare for, and respond to, the Annual Comprehensive Annual Financial Report (ACFR) audit prepared using Governmental Accounting Standards Board (GASB) standards.

Minnesota Management Analysis and Development – *Review of Accounting and Financial Management Processes (04/2020 to 09/2020).*
Yoko led the BerryDunn's team to conduct the review of accounting and financial management processes. Her team reviewed the current financial processes of MAD, performed a gap analysis, and made detailed recommendations to improve the efficiency of financial management and the timeliness, accuracy, and transparency of financial reporting.

Lake County, IL – *Audit of Contract Deliverables for e-filing Implementation (05/2019 to 11/2019).*
Yoko served as the lead analyst and conducted an evaluation of Lake County's electronic court filing (e-filing) system implementation. Through this forensic audit, BerryDunn helped Lake County's Leadership determine what work was performed by the system integrator, which funds were used to pay for implementation activities, and whether the vendor met its contractual obligations.

Massachusetts HIX/IES Entities – *IV&V Services (11/2012 to 02/2018).*
BerryDunn provided IV&V for Massachusetts' HIX/IES implementation. Since 2014, Yoko has been leading the Financial Review task area for IV&V services, providing monthly financial status reporting, documenting cost allocation methodologies, reviewing System Integrator's invoices, and assisting with change request review. Her major responsibilities included review of the financial management process and tools for this large-scale project to help ensure integrity of the financial data, correct use of various funding sources based on the approved cost allocation methodology, and to help ensure efficiency of the financial management process. In addition, her team has assisted with the development of IAPD-Us, which have resulted in the Commonwealth receiving over $110 million in federal funds under Title XIX.

RFP # 2023-PRMP-MES-EOMC-004

Appendix A: Resumes | 421

Alexandra Torres
Business Analyst, APD
Project Coordinator

Years of Applicable Experience: 6
Years of Relevant Experience Supporting PRDoH & PRMP: 6
Education and Certifications

Fluent in Spanish and English

BS, Natural Science, Interamerican University of Puerto Rico

Alexandra is a consultant in BerryDunn's Medicaid Practice Group. Residing and working in San Juan, Puerto Rico, she is strongly familiar with Puerto Rico's governmental landscape and ways in which to embrace opportunities locally. Alexandra is fully bilingual—speaking, writing, and comprehending both Spanish and English fluently—as well as skilled at conducting research; coordinating project activities; documenting findings, policies and procedures, workflows, and project artifacts; and identifying and implementing efficiencies and best practices. A strong communicator, problem solver, and team player, she delivers exceptional services and high quality of work and project outcomes.

Key Qualifications

- ❖ Six years of experience supporting the Puerto Rico Medicaid Program; supporting the development of standard operational procedures (SOPs) and the PHE Unwind for PRMP
- ❖ Led special projects related to process improvement initiatives and corrective action planning to help elevate functions engagement and analyzed existing systems and databases and recommended enhancements to solve business needs
- ❖ Six years of experience supporting PMO efforts
- ❖ Schedule and Time Management
- ❖ Process Improvement
- ❖ Organized and adaptable

Relevant Experience

BerryDunn (08/2022 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (08/2022 to present).*
Alexandra has led special projects related to process improvement initiatives and corrective action planning to help elevate the administrative functions of the Puerto Rico EOMC engagement. She analyzes existing systems and databases and recommended enhancements to solve business needs; supports the development of standard operational procedures (SOPs) for the Puerto Rico Medicaid Program; supports the Public Health Emergency (PHE) Unwind for the Puerto Rico Medicaid Program; and facilitates workshops to collect project requirements and user feedback. Alexandra also supports program coordination activities, scheduling meetings, taking notes, capturing action items, and distributing notes after meetings.

Intervoice Puerto Rico (02/2018 to 08/2022)

As a security administrator and project coordinator, Alexandra was responsible for troubleshooting basic IT situations for the company, executing billing tasks, maintaining invoice log, maintaining confidential and specialized documentation in document libraries, assisting with special projects such as process improvement initiatives and corrective action planning, and drafting status reports.

PL Holdings, LLC (02/2015 to 10/2020)

Alexandra served as a personal assistant to the company CEO, managing staff, event planning, payroll, expensing reports, and office logistics.

Angie Phifer
Business Analyst, Policy Program

BerryDunn

Years of Applicable Experience: 5
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

BA, Political Science, Minor in Women's and Gender Studies, Magna Cum Laude, Denison University

Member of Phi Beta Kappa and Pi Sigma Alpha Honor Societies

Angie is a senior consultant in BerryDunn's Medicaid Practice Group and is experienced in assisting clients with policy guidance and research, independent verification and validation, and MES modernization. She is skilled in public policy research, development, and coalition outreach to advance legislative goals, particularly in the Health and Human Services field. She is practiced in state budgetary processes, including managing two state budget cycles and one state capital budget cycle in legislative offices.

Key Qualifications

- ❖ Over two years' experience consulting with SMAs in business analysis roles on IV&V and policy projects for the Ohio Department of Medicaid and PRMP
- ❖ Five years' experience in policy analysis and research, including over two years of legislative affairs experience
- ❖ Over two years' experience providing business analysis work pertaining to SMC certification, strategic planning, and policy support
- ❖ Over two years' experience with State Plan Amendments and Money Follows the Person

Relevant Experience

BerryDunn (09/2021 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) (10/2022 to present)*. Angie serves as a consultant on the PRMP EOMC State Plan Amendments (SPA) and Money Follows the Person (MFP) Needs Assessment projects. She contributes to the research and drafting of SPAs and performs analysis of gaps in PRMP's current state plan. She also contributes to the research and drafting of the MFP Needs Assessment, including stakeholder communication planning, data collection, and research analysis.

Ohio Department of Medicaid (ODM) – *Ohio Medicaid Enterprise System (OMES) IV&V Services (09/2021 to present)*. ODM is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project, and BerryDunn is providing IV&V support. Angie serves as a consultant on the project, collaborating with OMES stakeholders, observing client meetings, contributing to biweekly, monthly, and quarterly reports, and reviewing project artifacts.

Ohio House of Representatives, Legislative Aide to Representative Monique Smith (01/2021 to 09/2021)

Angie drafted, managed, and tracked legislation, including three primary sponsored bills and bills in the House Commerce & Labor, Economic & Workforce Development, and Technology & Innovation Committees. She worked with local leaders, constituents, and organizations to resolve individual and community issues and managed the daily operations of the office, including scheduling, intern management, and communications.

Ohio House of Representatives, Legislative Aide to Representative Randi Clites (01/2019 to 12/2020)

Angie drafted, managed, and tracked legislation, including 12 primary sponsored bills and bills in the House Aging & Long-Term Care, Agriculture & Rural Development, and Health Committees. She worked with local leaders, constituents, and organizations to resolve individual and community issues and managed the daily operations of the office, including scheduling, intern management, and communications.

Randi Clites for State Representative (06/2018 to 11/2018)

As the campaign manager, Angie directed field, fundraising, and communications for Randi Clites' successful campaign for Ohio HD75. She oversaw and ran a field operation that made over 54,000 contacts with voters through canvassing and phone calls; directed candidate in raising over $70,000 and managed the campaign spending and budgeting; and managed candidate's schedule, planned campaign events, and directed the campaign's social media.

College Democrats at Denison University (05/2017 to 05/2018)

Angie guided the Executive Board and managed a $30,000 budget; organized, planned, and advertised meetings and events with speakers including Howard Dean and Joe Lieberman, and she coordinated club efforts with political campaigns and candidates including Hillary Clinton, Ted Strickland, and local Licking County candidates.

Senator Sherrod Brown (05/2017 to 08/2017)

Angie spoke to constituents and logged their concerns from calls, voicemails, faxes, and letters, and she managed casework and requests for assistance.

Scottish Parliament, Intern to Gail Ross (01/2017 to 05/2017)

Angie wrote policy briefs and motions, conducted background research, and compiled contact lists. She completed a comprehensive research project on women's political representation in the Scottish Highlands.

Ohio Together (09/2016 to 11/2016)

As a campus fellow, Angie recruited volunteers at Denison University to canvas and register over 500 new voters. She planned and organized events featuring campaign surrogates, canvassing, and meetings.

Strickland for Senate (05/2016 to 07/2016)

As a policy and finance intern, Angie wrote policy briefs, conducted research, and managed policy projects including Governor Strickland's "Women and Working Families" Platform. She fundraised via phone calls, creating mailers, and staffing events.

César De Jesús, JD, MS, CAPM®
Business Analyst, Procurement

César brings more than 10 years of experience with statistical analysis, business requirements development, project management and project coordination, and research. He brings knowledge of healthcare compliance, CMS regulations, healthcare claims research, and public health.

Key Qualifications

- ❖ Over 10 years' experience with statistics and business requirements development
- ❖ 10 years' experience with project management, coordination, public health, and legal analysis
- ❖ Assisted and supported all phases of the development of five procurements for the PRMP
- ❖ Licensed Attorney and Notary, Commonwealth of Puerto Rico Supreme Court
- ❖ MS, Research Evaluation of Health Systems
- ❖ Certified Associate in Project Management® (CAPM®)

Years of Applicable Experience: 10
Years of Relevant Experience Supporting PRDoH & PRMP: 3

Education and Certifications

Fluent in Spanish and English

Juris Doctor, Interamerican University of Puerto Rico School of Law

MS, Research Evaluation of Health Systems, University of Puerto Rico School of Public Health

BBA, Finance and Human Resources Management, University of Puerto Rico

Certificate in Healthcare Compliance, University of Pittsburgh School of Law

Certified Associate in Project Management®

Licensed Attorney and Notary, Commonwealth of Puerto Rico Supreme Court

Relevant Experience

BerryDunn (11/2020 to present)

Puerto Rico Medicaid Program – *Enterprise Objective Monitoring and Control (EOMC) Services (11/2020 to present).* César provides outcomes-based procurement support, which includes drafting and reviewing RFPs, reviewing evaluation materials, drafting letters of awards, responding to vendor questions, cost estimates, procurement roadmaps, and evaluation sessions meeting facilitation. Additional projects he has worked on for PRMP include statement plan amendments support, business process model drafting for the MITA SS-A Report and Business Area summaries, an MES Roadmap, and various project coordination activities.

Relisc Corporation (12/2019 to 09/2020)

As a business analyst, César provided research for adjudicated healthcare claims, both medical and pharmacy, to determine whether those reports were in accordance with regulatory requirements. He also provided drafting support for technical specifications documents, quality assurance for healthcare reports, and rate calculation validations.

Abarca Health (01/2019 to 11/2019)

César served as a data analyst and Medicare financial operations analyst, which included being responsible for Medicare Part D prescription drug event (PDE) error resolution, PDE monitoring, cross-functional effort coordination between departments to complement PDE operation, CMS memos and regulation monitoring for implementation and internal procedures updates, and desk-level procedures and business requirement document drafting for platform enhancements.

Private Law Practice (12/2010 to 08/2017)

As a lawyer and public notary, César provided case management of mortgage foreclosures, wrongful employment termination, driving under the influence of alcohol, possession of controlled substances, divorces, affidavits, lease agreements and torts, among others.

Christiaan Colston
Business Analyst, E&E PgMO and PERM

Christiaan is a versatile human services professional with extensive experience in project development and program planning. Her expertise lies in building programs and strategic relationships with stakeholders and community partners. She is proficient in understanding the needs of families and communities, implementing programs and training to address needs and executing high-impact workshops and programs. Her experience includes nine years of Medicaid eligibility, training development, program administration, community engagement, data collection, and project facilitation.

Years of Applicable Experience: 9
Years of Relevant Experience Supporting PRDoH & PRMP: <1
Education and Certifications

MA, Applied Behavioral Science, Concentration in Criminal Justice and Social Programs, Wright State University

BA, History, University of Dayton

Key Qualifications

- ❖ Nine years of experience as an eligibility specialist for Medicaid, Supplemental Nutrition Assistance Program (SNAP), and Temporary Assistance for Needy Families (TANF)
- ❖ Over nine years of experience researching and interpreting Medicaid, SNAP, and TANF policy
- ❖ Experience administrating a United Sates Department of Agriculture (USDA) food program for child care professionals
- ❖ Experience developing and facilitating USDA compliant trainings for child care professionals
- ❖ Provided over three years of logistical support to an Airforce Research Lab

Relevant Experience

BerryDunn (04/2023 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring & Control Services (EOMC).*

Christiaan is a senior consultant with BerryDunn's Medicaid Practice Group. Christiaan serves as a lead for PRMP's Medicaid Eligibility Quality Control (MEQC) program. Christiaan also provides subject matter expert support for E&E related activities in Puerto Rico.

Action for Children (05/2022 to 04/2023)

As the Child and Adult Care Food Program (CACFP) coordinator, Christiaan was responsible for reviewing monthly reports to help ensure the program is being administered according to USDA policies and nutritional guidelines. She developed strategic initiatives and outreach work to help increase provider enrollment and involvement with the program, educated providers on USDA nutrition guidelines that helped promote wellness for the children in their child care programs, and managed front-line accountability for quality program delivery including core programs, new initiatives, training, monitoring, and developing staff so that programs were well delivered. She also championed the complete spectrum of resource coordination and people management, while planning the work activities of personnel, training, and coaching staff members, and assigning work duties.

Montgomery County Department of Job and Family Services (05/2013 to 05/2022)

Christiaan processed applications for public assistance programs, including SNAP, Medicaid and TANF, interviewing applicants, and verified submitted documents for benefit determination. She researched and interpreted state and federal policies to help ensure all cases were processed accurately; calculated budgets manually, and within state eligibility system for benefit determination; and performed extensive caseload management, updating changes to cases, completing reports, and maintaining case records.

Wright Patterson Air Force Base (05/2009 to 12/2012)

As an engineer technician aid, Christiaan performed database management and asset tracking, keeping accurate and detailed records on computer equipment tracked for the Airforce Research Lab. She assisted engineering labs with stock plan inventory for compliance inspections, resulting in yearly passage of inspections, and scanned and uploaded material safety data sheets to a resource database for the Airforce Research Lab.

Derica Smith, MPH
Business Analyst, PERM

Derica is a professional consultant with more than a decade of experience, overseeing multifaceted healthcare-related projects, including five years of federal health and human services (HHS) experience. Her skills include project management, developing detailed communications, organizing learning events, interfacing with stakeholders, data and policy research and analysis, and meeting compliance requirements.

Years of Applicable Experience: 11
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

MPH, Health Policy and Management, Florida Agricultural and Mechanical University

BS, Health Science, Florida Agricultural and Mechanical University

Key Qualifications

- ❖ Over 10 years of HHS experience
- ❖ 11 years' experience with project and program management, public health policy; specifically, five years of State Medicaid Agency experience
- ❖ Over five years of federal HHS experience
- ❖ Over three years' experience in a Senior Consultant role across two management consulting firms
- ❖ Experienced in developing state regulations and legislation, policy manuals and briefs, and program memoranda with the federal government
- ❖ Experienced in developing webinars and in-person training
- ❖ Provided data management for multiple states

Relevant Experience

BerryDunn (07/2022 to present)

Puerto Rico Department of Health Medicaid Program (PRMP) – *Puerto Rico Enterprise Objective Monitoring Control Services (07/2022 to present).*
Derica supports Puerto Rico's Payment Error Rate Measurement (PERM) cycle efforts by collaborating with PERM stakeholders, leading client meetings, and providing subject matter expert (SME) support and guidance. Derica also works on the Integrated Medicaid Enterprise Systems (IMES) work stream by supporting the development of PRMP's program management framework to help guide the day-to-day activities of their Medicaid Enterprise.

OptumServe Consulting/The Lewin Group (02/2019 to 07/2022)

As a senior consultant, Derica managed five healthcare management initiatives: the Centers for Medicare & Medicaid Services (CMS) Home and Community-Based Services Special Populations Project, UnitedHealth Group STOP COVID Program, Vaccine Outreach Implementing Community Engagement Program, CMS Payment Error Rate Measurement Statistical Contractor Project, and the CMS Transforming Clinical Practice Initiative Project. Her duties ranged from developing task deliverables such as toolkits, white papers, issue briefs, presentations, and environmental scans; allocating resources (including personnel and budgets); coordinating subcontractors; and organizing virtual and in-person learning events. She also served as data manager for multiple states, managing quarterly processing of Medicaid and Children's Health Insurance Program (CHIP) claim data, overseeing the quality control review process, and sampling of claims for data processing, medical record, and eligibility reviews.

Anthem, Inc. (07/2018 to 02/2019)

Derica managed projects for two Medicaid compliance program markets, which included building and maintaining project work plans and helping ensure project deliverables were met within established time frames and budgets. She balanced compliance requirements with contractual obligations; developed tools to identify, manage, and mitigate regulatory and/or

compliance vulnerabilities; and prepared materials such as external audits, site reviews, accreditation, and required submissions to regulatory or oversight bodies. Derica also analyzed and interpreted data, metrics, and other information to build presentations and other formal briefing documents for management.

Council for Affordable Quality Healthcare, Inc. (CAQH) (01/2018 to 07/2018)

In the role of project associate, Derica examined and developed operating rules related to electronic information exchange to assist the healthcare industry with streamlining their day-to-day business practices. She managed the development of project tasks, external-facing presentations, and discussion materials related to the organization's initiatives and industry trends for monthly multi-stakeholder committee meetings with over 30 participants. Working collaboratively with management, she identified, documented, planned, and coordinated project tasks and milestones using detailed work plans. She developed various progress reports and helped ensure corrective actions were taken as needed for successful project completion.

National Academy for State Health Policy (12/2016 to 09/2017)

As a policy associate, Derica served as project manager for an assigned federal project and was a policy content expert on various policy topics. She used qualitative research methods to analyze state programs and developed a variety of written deliverables and online publications for both internal and external audiences. This included authoring or co-authoring case studies and articles used by state health officials for educational and training purposes, and she developed and executed a national webinar with over 150 attendees and an in-person learning session with over 40 attendees for state-to-state learning and exchange. She conducted in-depth policy research and analysis on health policy topics related to women and children's health and provided technical assistance to five states in the areas of maternal and infant health.

Agency for Health Care Administration (04/2011 to 12/2016)

Derica served both internal and external stakeholders by evaluating and developing state regulations and legislation, policy manuals and briefs, and program memoranda in reference to Medicaid program impact; resolving programmatic issues; and providing technical assistance. Her policy consulting work involved analyzing program vulnerabilities, Medicaid reimbursement rates, and relevant policies and monitoring compliance and creating action plans to resolve issues. She developed and presented policy recommendations both written and verbal. During her time at the agency, Derica successfully managed two statewide non-emergency medical transportation contracts exceeding $11 million.

Gianfranco Rosso Santiago
Business Analyst, MITA SS-A

Gianfranco is a proactive and detail-oriented business analyst with expertise in quality assurance, project requirements assessments, and business data clarification. He is proficient in providing analytical support for diverse projects.

Gianfranco has business analyst experience in the healthcare industry acquired through working with two Managed Care Organizations (MCOs) in Puerto Rico and the Puerto Rico Medicaid Program (PRMP). He also has over eight years of experience working in Puerto Rico as a consultant in the healthcare and IT industry.

Years of Applicable Experience: 8
Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

Fluent in Spanish and English

Bachelor of Arts in Business Administration, Interamerican University of Puerto Rico

Key Qualifications

- ❖ Over eight years of experience as a consultant in the healthcare and IT industries with project management, requirements gathering, and development of business and technical documentation
- ❖ Over five years' experience in the healthcare industry acquired through MCOs and PRMP
- ❖ Extensive experience with software applications, including Microsoft Office - Word, PowerPoint, Excel, Visio, and Project
- ❖ Additional software experience and knowledge including basic SQL experience, Microsoft Access and basic cloud computing knowledge, and Microsoft Azure
- ❖ Superior research, requirements gathering, and analysis skills
- ❖ Detail-oriented, with a proven ability for developing thorough technical and process documentation
- ❖ Excellent interpersonal and communication skills and a demonstrated willingness to work in a team-oriented environment
- ❖ Strong leadership and problem solving skills; organizational skills with ability to carry out tasks with minimal supervision
- ❖ Experience in working with Agile and Waterfall methodologies
- ❖ Experience in developing test cases/scripts and conducting User Acceptance Testing (UAT) of systems and applications
- ❖ Experience in managing projects from the initiation through the closure of its life cycle
- ❖ MITA Subject Matter Expert (SME) that has assisted in the development and completion of four annual MITA submissions with PRMP and experience in leading the APD service

Relevant Experience

BerryDunn (03/2020 to present)

Puerto Rico Medicaid Program (PRMP)

Gianfranco works as a business analyst and currently assists in the development of the 2023 MITA IT Investment Strategy document by leveraging the IT Investment Toolkit, the Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC) guidance, and the MITA 3.0 Framework to provide PRMP with a new outcomes-based approach in place of measuring the growth of the enterprise with maturity levels. He also assisted in the creation of a new MITA Outcomes Matrix, by developing over 100+ MITA outcomes and targets for several business processes within the MITA 3.0 Framework and mapping state-specific and CMS outcomes to the MITA outcomes.

He also assisted in the development and completion of two Medicaid Information Technology Architecture (MITA) 3.0 Annual Update (AU) Reports by evaluating the maturity using CMS capability matrices and scorecards; conducting gap analyses; and documenting the Puerto Rico Medicaid Enterprise's As-Is state and To-Be environment for all business areas and processes.

For the completion of the two MITA 3.0 AU Reports, Gianfranco also conducted fact-finding sessions with stakeholders from several government agencies within the Puerto Rico Medicaid Enterprise. He also increased stakeholder satisfaction by implementing a format for conducting fact-finding sessions that significantly reduced session times; facilitated the gathering of PRMP systems, data sharing partners information and state-specific business process steps; helped the client identify its goals and objectives in alignment with CMS goals; and identify its spotlight projects from the MES Roadmap (3-5 years).

Gianfranco also led the Medicaid Enterprise Systems (MES) and the Eligibility & Enrollment (EE) Advanced Planning Document (APD)-Updates as requested by the Centers for Medicare & Medicaid Services (CMS) and PRMP. The APD-Updates resulted in increased stakeholder satisfaction and enhanced federal funding for the implementation, maintenance, and operations of its MES for Federal Fiscal Years (FFYs) 2023-2025.

Wasatch Partners Consulting (04/2017 to 03/2020)

As a project manager, Gianfranco managed multiple projects such as the development of an internal payment processing application and a provider portal for First Medical (client).

For the client UBS, Gianfranco conducted quality control-driven analysis and Regulatory Reporting field mapping as a business analyst. He created data lineage documentation for each feeder system utilizing programming specifications, data models, and other reference material, and he also created customized pivot tables, tools, and templates that facilitated the understanding of data for stakeholders. Gianfranco managed a SharePoint library that contained data lineage documentation from all source systems, making it more efficient to keep records for audit purposes, and he led the QA team by monitoring changes in data, proposing possible solutions to remediate issues and providing weekly summary reports to management. He imported and exported organized data from Microsoft Access to provide specific data requested by the Data Management Office and created user manuals and training material for the data lineage process to facilitate the training of team members and new hires.

E3 Consulting (03/2015 to 03/2017)

Gianfranco served as a business analyst and elicited requirements, using document analysis, mock-ups, interviews, surveys, site visits, use cases, and scenarios for MMM (client). He managed a project that consisted of the creation of a web application for the Government Health Plan call center, which improved the customer service significantly by facilitating the search for client records and other relevant medical information, and he conducted multiple UATs for several systems and internal applications while liaising with third-party representatives to help ensure an effective functionality based on requirements established by the client.

As a business analyst for the client Sol Coop, Gianfranco supported the testing and implementation process of the website and mobile application for the institution, and he also assisted in the configuration and customization of systems such as Encompass and Ellie Mae based on requirements established by the institution.

Jennifer Ferrer, MBA, PMP®
Business Analyst, OCM

Years of Applicable Experience: 15
Years of Relevant Experience Supporting PRDoH & PRMP: 8

Education and Certifications

Fluent in Spanish and English

MS, Business Administration, University of New Orleans

BA, Political Sciences, University of Puerto Rico Mayagüez Campus

Project Management Professional®, Project Management Institute

Medical Coding and Reimbursement Micro-Credential, American Health Information Management Association (AHIMA)

Public Relations Accreditation, Universidad del Sagrado Corazón

Jennifer is a Project Management Professional® with extensive experience managing the contracting processes and relationships of the Providers Network for the largest Managed Care Organization in Puerto Rico. She has assumed the Contracting Strategies Partner and Provider Network Manager roles for the Commercial, U.S. Virgin Islands, Medicare, and Medicaid lines of business. Jennifer is proficient in provider credentialing, contracting, contract configuration, claims analysis, and closing complex negotiations with hospitals, ancillary services providers, specialists, and delegated entities. Jennifer has managed RFPs and contributed to completing audits and certifications from accredited bodies such as URAC. She is knowledgeable in Agile and HIPAA and has skills in business, communications, contract management, business strategy, ICD-10-CM, current procedural terminology (CPT), HCPCS, MS Office, ICES, Mainframe, OnBase, TriZetto QNXT, and Kronos. She also has experience in the pharmaceutical industry. Jennifer is bilingual in Spanish and English.

Key Qualifications

- ❖ Advanced Risk Management and HCC coding for Value-Based Payments CEU
- ❖ Four years' experience managing and coordinating the contracting negotiations and business relationships of service providers, including hospitals, specialists, ancillary, pharmaceutical, and delegated entities for an MCO in Puerto Rico
- ❖ Five years' working with providers' account management and service and one year working in the pharmaceutical industry
- ❖ Four years' experience planning and successfully executing strategic Provider's Network projects in liaison with the PgMO, legal, and actuarial teams; contributing to completing audits and certifications from accredited bodies such as URAC; knowledgeable in Agile and HIPAA; experienced with business communications
- ❖ One year of experience supporting project management activities in consulting

Relevant Experience

BerryDunn (08/2022 to present)

Puerto Rico Medicaid Program (PRMP) *(08/2022 to present).*
Jennifer is a project coordinator on the PRMP project for MITA, SPA, Program Integrity, and she is a Business Analyst for the MFP initiatives. She will help ensure that projects are organized according to the milestones and deliverables requirements. She has supported leads on meetings and project scheduling, progress tracking, documentation, research, document drafting, and budgeting.

Triple S Salud - BCBS of Puerto Rico (09/2012 to 12/2019)

- ✓ *Contracting Strategies Partner (2016 to 2019).*
  As a contracting strategies partner, Jennifer provided strategic planning aligned with risk management and the actuarial teams' data analysis and reports. She worked with business case and project requirements documentation in liaison with the project management office. She drafted contracts according to accrediting

bodies requirements, such as URAC and CMS. She also contributed to URAC certification, certification audits. Jennifer performed delegated entities contract negotiation, configuration, management, and oversight. She managed request for proposals (RFPs) for vendors and providers as well as implemented and monitored contracting cost containment initiatives reducing up to 10% of specific services expenditures in compliance with the business plan.

✓ *Network Manager (2014 – 2016).*
Jennifer worked as a network manager co-leading United States Virgin Islands, government, and commercial plans operational contracting activities. She led the contracting team to create work plans and launched the first and only dental network for the Blue Cross Blue Shield of the United States Virgin Islands (USVI). Jennifer co-led USVI market payment policies implementation and system configuration and co-launched institutional pay for performance, fixed and capitation payment agreements.

✓ *Contracting Coordinator (2012 – 2014).*
As a contracting coordinator, Jennifer contributed on operational metrics reports designs for contracting processes. Along with the legal team, she successfully negotiated contractual terms for all USVI Hospital providers and co-launched an exclusive pharmacy benefit manager for the BCBS USVI market. Jennifer restructured USVI's provider network financial negotiation and configuration process. She performed oversight of credentialing and re-credentialing activities of providers under USVI Network.

Quintiles Pharma Service Corp (04/2011 – 05/2012) – PR Project (J&J)

Jennifer worked as the oncology sales and business specialist for the Puerto Rico project and performed business analysis demonstrating management skills within her established territory. She coordinated educational, promotional, and clinical events for key customers. Jennifer implemented market research strategies to increase sales and performed detailed assessments to remove medication access barriers. She co-led Oncology and Central Nervous System sales force knowledge in patient's access and health insurance coverage and reimbursement.

Triple S Salud (11/2005 – 04/2011)

✓ *Providers Account Service Executive (2009 – 2011).*
As the providers account service executive, Jennifer prepared customized presentations for physicians and authored several articles, which were published in Triple S' Physicians' Magazine. She co-led Integrated Health Care Centers Network expansions and was responsible for promoting quality managed care programs and products.

✓ *Providers Account Manager (2005 – 2008).*
As the providers account manager, Jennifer helped develop performance improvement plans to maximize productivity. She applied cost-effective changes (Kaizen) following business process improvement and lean philosophy and analyzed physician's networks by identifying operational improvement opportunities. Jennifer was the on-site first contact for resolution and claims adjustments. She monitored claims processing to measure compliance with business agreements and payment policies.

Pharmaceutical Detailing Services (01/2005 – 11/2005)

Jennifer worked as a Medicare advantage network contractor and provided contracting for CosviMed Medicare Advantage Network and promoted the Medicare advantage program's benefits to primary care physicians and specialists. She also provided guidance to providers and marketed contracts to physicians.

Jorge Vélez-López
Business Analyst, Other EOMC, E&E PgMO, and SMC

Jorge is a detail-oriented Quality and Compliance Specialist dedicated to improving policies and procedures in all business areas as well as removing barriers to care for patients and improving healthcare services. He brings 13 years of experience in the healthcare industry, including project management, HEDIS, NCQA, and CMS (Medicare/Medicaid).

Key Qualifications

Years of Applicable Experience: 13
Years of Relevant Experience Supporting PRDoH & PRMP: 8

Education and Certifications

Fluent in Spanish and English

Bachelor of Nursing, Interamerican University

- ❖ 13 years' experience in healthcare industry, including project management, HEDIS, NCQA, and CMS; experience acquired through working with MCs, state regulator (ASES), and PRMP
- ❖ 13 years of experience in improving policies and procedures, removing barriers to care for patients, improving healthcare services, and working with quality and compliance
- ❖ Software: MS Office, Inovalon QSI (Quality Spectrum Insights), Inovalon QSHR (Quality Spectrum Hybrid Reporter), Salesforce, ADP, and Kronos
- ❖ Project Management skills including leadership, communication, quality, compliance, time management, problem solving
- ❖ Healthcare Industry experience with Medicare, Medicaid, HCC, HRA, and CAHPS
- ❖ Assisted in developing and implementing the quality and compliance program for a healthcare company
- ❖ Assisted in implementing strategies and procedures for acquiring the reimbursement of the retention fund from state regulator, on a quarterly basis, for four consecutive years
- ❖ Collaborated in developing and implementing a preventive screening program via telephone appointment scheduling, while improving HEDIS rates for a health plan
- ❖ Assisted in the process of the Puerto Rico Medicaid Program's MEDITI3G system operational readiness review and certification review, with successful results

Relevant Experience

BerryDunn (12/2020 to present)

Puerto Rico Medicaid Program (PRMP) – *Federal Fiscal Year (FFY) 2021-2022 Enterprise Objective Monitoring and Control (EOMC) Services (12/2020 to present)*.
Jorge has worked as a business analyst and project coordinator with the Puerto Rico Medicaid Program to develop client deliverables, perform operational research, and identify opportunities to improve business processes. He coordinates meetings, maintains project calendars, and assists with reporting project status, progress, schedule, and quality. He assists with the documentation review facilitation, tracking, and maintenance. He identifies, documents, and escalates contractual obligations that are at risk or being overlooked. He researches, analyzes, documents, and assists in implementing strategies to improve client's organizational structure. Jorge assisted in the Outcomes-Based Certification process and in collecting evidence to satisfy CMS' operational readiness review and certification review criteria. Jorge also works in the Public Health Emergency (PHE) Unwind project, assisting the Puerto Rico Medicaid Program (PRMP) to comply with CMS' guidance for beneficiary eligibility recertifications and timely requirements.

Molina Healthcare (04/2015 to 09/2020)

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

Altegra Health (07/2012 to 04/2015)

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

TeleMedik (03/2010 to 05/2012)

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

Kodi Gosselin Berube
Business Analyst, Security

Years of Applicable Experience: 3
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

BS, Cyber Security and Computer Science, Thomas College

Kodi is a consultant in BerryDunn's Government Assurance Practice Group. He is motivated by the challenge of staying up to date on cyber trends, industry standards, and protection of civilization from cyber threats. He understands cyber defense and penetration testing and brings enthusiasm to help clients determine and reduce business risk. Kodi has programming experience in Java, C++, and Python. Additionally, he has experience with Azure Database Management and Saint Vulnerability Management. As a consultant in the Government Assurance Practice Group, Kodi has helped organize data for Practice Groups, has assisted with risk assessments regarding Health Insurance Portability and Accountability Act of 1996 (HIPAA), and has conducted managerial policy and procedure review against the National Institute of Standards and Technology (NIST) SP 800-53 and MARS-E standards.

Key Qualifications

- ❖ Experience completing MARS-E assessments with MO, NM, WV, and PR
- ❖ Experience analyzing and interpreting of system configurations
- ❖ Experience reviewing technical documentation, including policies, procedures, and plans
- ❖ Two years of IT security experience

Relevant Experience

BerryDunn (06/2021 to present)

Minnesota Department of Human Services (DHS) – *Minnesota Provider Screening and Enrollment (MPSE) Security and Privacy Assessment (8/2023 to 10/2023).*

Kodi served as a staff consultant in conducting a security and privacy assessment of the MPSE environment based around NIST SP 800-53 r.5 moderate and privacy control baselines. The assessment was limited to documentation review and a configuration assessment.

Puerto Rico Medicaid Program (PRMP) – *MARS-E Assessment Eligibility Enrollment System (11/2022 to present).*
Kodi served as a staff consultant in completing an independent assessment of the security and privacy controls of the Puerto Rico Eligibility and Enrollment System using CMS' MARS-E 2.0 and 2.2 controls framework. Assessment included vulnerability scanning, web application scanning, and penetration testing.

Bay Area Air Management Quality District – *Cybersecurity Maturity Assessment and Strategic Plan (11/2021 to present).*
Kodi serves as a staff consultant in conducting an analysis of Bay Area Air Management Quality District (BAAQMD) cybersecurity posture to assess the maturity of the cybersecurity program and to develop a strategic roadmap.

Glynn County, GA – *Independent Security Assessment (08/2022 to 12/2022).*
Kodi served as a staff consultant in conducting a cybersecurity risk assessment for the County using the National Institute of Standards and Technology (NIST) Cyber Security Framework (CSF).

New Mexico Health Insurance Exchange (NM HIX) – *Independent Security and Privacy Controls Assessment (03/2022 to 08/2022).*
Kodi was a staff consultant in conducting an annual independent assessment of the security and privacy controls of the New Mexico Health Insurance Exchange Eligibility and Enrollment system using CMS' MARS-E 2.0 and 2.2 controls framework. Assessments covered all controls and Year 1 controls. Assessments included vulnerability scanning, web application scanning, and penetration testing.

Missouri Department of Social Services (DSS) – *Independent Security Assessments (ISAs) for Missouri Eligibility Determination and Enrollment System (MEDES) (01/2022 to 05/2022).*

Kodi served as a staff consultant in conducting an annual independent assessment of the security and privacy controls of the Missouri Eligibility Determination and Enrollment System using CMS' MARS-E 2.0 and 2.2 controls framework. Assessments covered all controls, Year 1, Year 2, and Year 3 controls. Assessments included vulnerability scanning, web application scanning, and penetration testing.

Missouri Department of Social Services (DSS), MO HealthNet Division (MHD) – *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (09/2021 to 05/2022).*

Kodi was a staff consultant in completing an NIST 800-53 R5 independent security risk assessment for the following systems:

- ✓ Clinical Management Services and System for Pharmacy Claims and Prior Authorization (CMSP)
- ✓ Medicaid Management Information System (MMIS)
- ✓ Program Integrity (PI)
- ✓ Business Intelligence Solution/Enterprise Data Warehouse (BIS-EDW)

The assessment included configuration testing, vulnerability scanning, web application testing, and penetration testing.

City of Phoenix, AZ City Auditor's Office – *Water Services Department (11/2021 to 04/2022).*

Kodi was a staff consultant performing a security assessment of the City of Phoenix (City) Water Services Department Process Control Systems (PCS) and network security controls. The assessment performance period was December 2021 through March 2022. The National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF) and the American Water Works Association (AWWA) Process Control System Security Guidance for the Water Sector were used for the security control set for the assessment.

NorthCross Group (06/2020 to 10/2020)

As an intern, Kodi researched security information and event management products for an organization with a limited IT team. He scanned and organized vulnerability data for managers, categorizing the threats; he helped ensure company compliance was sustained throughout different branches and investigated a cyber breach to identify how and where the breach occurred.

Thomas College Library (01/2018 to 09/2021)

Kodi installed multiple software updates on computers throughout campus with minimal supervision. He also assisted students with troubleshooting technology issues and set up new computers for typical use in compliance of Thomas Colleges technology policies.

Louis Krupp, CISSP, PCI-QSA
Business Analyst, Security

Years of Applicable Experience: 6
Years of Relevant Experience Supporting PRDoH & PRMP: 3
Education and Certifications

BS, Computer Science and Security and Cyber Defense, Thomas College

Certified Information Systems Security Professional (CISSP)

Global Information Assurance Certification Systems and Network Auditor (GSNA)

Payment Card Industry Qualified Security Assessor (PCI-QSA)

Louis is a senior consultant with BerryDunn's Government Assurance Practice Group, focusing on assisting clients with information technology (IT) security projects, with specific experience with MARS-E and PCI assessments. Louis brings a passion for penetration testing and vulnerability scanning to determine and reduce business risk. He has an intermediate level of programming experience, aiding in development of custom scripts used to gather and assess system and database configurations using scripting languages such as PowerShell and bash, and he has previous experience using other languages, including Java, C++, C# SQL, HTML, ASP, and VB Script. He is currently working on a Penetration Testing with Kali Linux course to get his Offensive Security Certified Penetration Tester certification.

Key Qualifications

- ❖ Experience with on completing MARS-E assessments in IN, MN, MO, NV, WV, and PR
- ❖ Experience working with one county and three companies on PCI assessments
- ❖ Experience analyzing and interpreting of system configurations, vulnerability scanning, and application scanning results
- ❖ Experience reviewing technical documentation, including policies, procedures, and plans
- ❖ Six years of IT security experience

Relevant Experience

BerryDunn (01/2017 to present)

Goodwill Industries of Northern New England – *PCI Assessment (05/2019 to 10/2019; 09/2020 to 04/2021; 04/2022 to 09/2022; 09/2023 to present).*
Louis served as a PCI-QSA for the Goodwill Industries of Northern New England. Louis analyzed data gathered during on-site meetings and policies and procedures in place and developed, identifying any gaps for what was in place. He assisted in completing an SAQ with Goodwill's team.

City of Phoenix, AZ City Auditor's Department

- ✓ *Web Application Vulnerability Scanning and Penetration Testing (04/2023 to present).*
  Louis serves as a technical security analyst for a penetration test of in-scope web applications of the City of Phoenix online environment. As part of this role, Louis assists with vulnerability scanning efforts and developing the report for the assessment.

- ✓ *Water Department Security Assessment (11/2021 to 04/2022).*
  Louis served as a technical analyst for the City of Phoenix. Louis tailored technical controls to review databases, servers, and workstations that would allow for an appropriate assessment level based around the project's limitations in time and availability. Louis aided in developing reports, including findings and recommendations related to the configurations that have been implemented by the Water Department and their environment.

✓ *IT Asset Management Audit (06/2020 to 03/2021).*
Louis was a security analyst performing an assessment of the City's IT Asset Management. In this role, Louis performed analysis of the City's IT asset management policies, procedures, and processes.

✓ *Database and Server Security Audit (06/2019 to 02/2020).*
Louis served as a technical analyst for the City of Phoenix. Louis aided in analysis of the configuration script outputs of the servers and databases in the environment. After analysis was completed, Louis helped develop the reports covering the findings for both databases and servers.

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

✓ *PCI Gap Assessment and PCI Program Development (05/2022 to present).*
Louis serves as a PCI-QSA completing a PCI gap assessment that includes mapping out Metro cardholder data environment (CDE) across all City departments. Louis assists in providing guidance on policies and procedures, performing a PCI gap analysis, and developing a PCI security program to help ensure the security of credit card data.

✓ *Information Security Program Development (01/2017 to present).*
Louis serves as a security analyst for the County. Louis developed tracking mechanisms for data gathered as part of cybersecurity assessments of the Water Services Department and a CJIS assessment of the Sheriff's office. He aided in interviews, documentation review, vulnerability scanning, penetration testing, and analysis of data for multiple assessments of the Water Services Department, the Davidson County Sheriff's Office, and IT Services. As part of each assessment, Louis assisted in developing the report based on findings and recommendations.

✓ *Water Services Penetration Test (06/2021 to 12/2021).*
Louis served as a technical analyst to complete a penetration test of the Metro Water Department. Louis aided in the project by searching for any open-source intelligence related to the Water Department systems, communications, and employees and analyzing potential threats to the environment.

✓ *Water Services Security Assessment (04/2018 to 10/2018).*
Louis served as a security analyst on a gap assessment against the Nashville, TN Water Services Department Process Control Systems and network security controls based around NIST's Cybersecurity Framework and the American Water Works Association's (AWWA) Process Control System Security Guidance. Louis specifically aided in gathering and analysis of data and policies, and interviews and developing the final report.

Kennebec County, ME – *Cyber Security Services (04/2023 to 10/2023).*
Louis served as the technical security analyst for the County. In this role, Louis assisted in completing web application scanning, external vulnerability scanning, internal vulnerability scanning, penetration testing activities, and developing a report for the activities completed during the project.

New Mexico Health Insurance Exchange (NM HIX) – *Independent Security and Privacy Controls Assessment (12/2020 to 07/2021; 03/2022 to 08/2022; 04/2023 to 08/2023).*
Louis served as a technical analyst for the annual CMS MARS-E assessment of the New Mexico Health Insurance Exchange (NM HIX) eligibility and enrollment system. In this role, Louis reviewed policies, procedures, and processes in place to help ensure that CMS MARS-E requirements were met, reporting any findings and providing recommendations for improvement in the system to better meet the expected requirements.

Maricopa County, AZ Office of Enterprise Technology (OET) – *Security Program Maturity (04/2023 to 06/2023).*
Louis served as a security analyst for the County's OET Information Security (InfoSec) assessing the maturity of their information security program. In this role, Louis reviewed documentation, participated in interviews with the four divisions of InfoSec, and developed a report based around the C2M2 that was customized for the County's specific program.

Bangor Savings Bank (BSB) – *PCI Gap Assessment (10/2020 to 06/2023).*
Louis served as a PCI-QSA for BSB. Louis aided in completing the PCI gap analysis, reviewing payment channels, and policies and procedures in place. With the BerryDunn team, Louis assisted on completing the SAQ and ROC for the assessment.

City of Scottsdale, AZ

✓ *Ransomware Readiness Assessment (01/2023 to 06/2023).*
Louis served as a technical analyst for the City of Scottsdale. Louis provided support to the team by reviewing Incident Response Exercise details, surveys, and the final report.

✓ *Wireless Network Security Assessment (01/2022 to 05/2022).*
Louis served as a technical analyst for the City of Scottsdale. Louis scanned to identify available wireless networks at multiple city locations and completed packet captures at each location for any networks that were identified in scope for testing security controls in place for the networks. Louis aided in the development and writing of the report identifying weaknesses and suggested remediation in the City's wireless networks.

✓ *Security Audit (12/2020 to 04/2021).*
Louis served as a security analyst performing an audit evaluating the effectiveness of the City's network security controls. Louis analyzed policies, procedures, and testing data gathered as part of the audit.

Puerto Rico Medicaid Program (PRMP)

✓ *Independent Security and Privacy Controls Assessment MMIS (06/2020 to 09/2020); MARS-E Assessment Eligibility Enrollment System (11/2020 to 04/2021;11/2021 to 04/2022; 11/2022 to 05/2023).*
Louis served as a security and technical analyst for a NIST based assessment of PRMP's MMIS and the annual CMS MARS-E assessment of the PRMP eligibility and enrollment system. Louis reviewed documentation including policies, procedures, plans, and specific evidence based around each control, and he interviewed employees to fill in any gaps not provided within the supporting documentation. He reviewed and analyzed vulnerability scan results, web application scan results, and configuration script outputs of servers and databases in the environment. He coordinated the development of detailed findings based around CMS's most recent update to the Security Assessment Report.

✓ *Incident Response Tabletop (08/2021 to 12/2021).*
Louis served as a security analyst for an incident response tabletop exercise and assessment of PRMP's Incident Response policy, plan, and procedures for the Medicaid Management Information System (MMIS) and Medicaid Eligibility and Enrollment System. The exercise and assessment were based around NIST SP 800-61 Rev. 2 Computer Security Incident Handling Guide.

Missouri Department of Social Services – *Independent Security Assessments (ISAs) for Missouri Eligibility Determination and Enrollment System (MEDES) (01/2017 to 05/2017; 01/2018 to 03/2018; 03/2019 to 04/2019; 01/2020 to 04/2020; 01/2021 to 06/2021; 01/2022 to 05/2022; 03/2023 to 05/2023).*
Louis served as a technical analyst performing a MARS-E assessment of the Missouri Eligibility Determination and Enrollment System (MEDES). Louis assisted with analyzing custom configuration script data; he reviewed policies and procedures and conducted interviews with the DSS and ITSD team that managed the system. Louis also helped develop the report by working with the team to create the tables and editing the document based on client requests.

Missouri Department of Social Services, MO HealthNet Division – *CMSP/MMIS/BIS-EDW/PI Security Risk Assessments (09/2021 to 05/2022).*
Louis served as a security and technical analyst for MHD. Louis reviewed and analyzed documentation and configurations to identify potential gaps and issues based around NIST 800-53 r5 controls for four different systems that are owned by MHD and managed by different vendors. Louis completed web application scans, reviewed configurations on servers and databases, and led the development for more than 10 deliverable reports for the different systems.

Ohio School Employees Retirement System (SERS) – *Incident Response Tabletop (08/2021 to 11/2021).*
Louis served as a security analyst for an incident response tabletop exercise and assessment of Ohio SERS' Incident Response plan, policy, and procedures. The assessment and exercise were based around NIST SP 800-61 Rev. 2 Computer Security Incident Handling Guide. Louis aided in the development of a cyber-threat brief based around current incidents, threat actors, and recent tactics, techniques, and protocols used by threat actors.

Minnesota Information Technology Services – *Independent Security and Privacy Controls Assessment (04/2018 to 06/2018; 03/2019 to 06/2019; 12/2020 to 05/2020; 01/2021 to 05/2021).*
Louis served as a security and technical analyst for the annual CMS MARS-E assessment of the Minnesota Eligibility Technology System (METS). Louis analyzed the script results from Linux servers and reviewed policies and procedures in place. Louis aided in the development of the Security Assessment Report.

West Virginia Department of Health and Human Resources (DHHR) – *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (08/2020 to 02/2021).*
Louis served as a security and technical analyst for West Virginia's Department of Health and Human Resources. Louis guided the development of the Security Assessment Report based on the recent changes from CMS in relation to their expected reporting format.

Sophia Barrios
Business Analyst, HIE and PgMO

Years of Applicable Experience: 6

Education and Certifications

Fluent in Spanish and English

Master of Public Health, University of Arizona

B.S. Biobehavioral Health, The Pennsylvania State University

Sophia is a business analyst with a strong track record in understanding federal governments. She has designed process improvement plans and implemented standard operating procedures (SOPs) for the Department of Veterans Affairs. She provides effective customer service, helps ensure the efficiency and effectiveness of project deliverables, and has experience evaluating health program strategies and contributing to the collection, policy analysis, interpretation, and dissemination of data to inform stakeholder decision-making.

Key Qualifications

- ❖ Six years' experience in process improvement, compliance, and quality assurance working with Veterans Health Administration
- ❖ Six years' experience in implementing process improvement plans, conducting quantitative data analysis, identifying trends, and preparing extensive reports and presentations
- ❖ Six years working in federal health project management
- ❖ Spearheaded health equity program initiatives that address Social Determinants of Health (SDOH), at-risk groups, minority populations, and uninsured

Relevant Experience

BerryDunn (10/2023 to present)

Sophia is a business analyst in BerryDunn's Medicaid Practice Group.

QTC Management, Inc. (03/2017 to present)

Sophia served as a senior medical quality analyst and managed quality assurance project deliverables for VHA Compensation and Disability examinations for both the client as well as the Department of Veterans Affairs (VA). She designed process improvement plans and implemented standard operating procedures (SOPs) as needed, and she also compiled and reviewed monthly data analysis of operational deliverables in the form of written reports or presentation to clients. Sophia implemented a program timeline and educational training curriculum for junior colleagues across two regions. She managed processes focused on effective customer service, helped ensure immediate escalation of issues, and participated in meetings to discuss case management processes.

In Sophia's tenure, she also worked as a medical quality analyst and conducted reviews of medical exam documentation in accordance with established medical and legal requirements. She compiled reports of quantitative data to identify trends in inquiries and shared them with team members and leadership as well as other stakeholders as necessary. Sophia monitored the creation of all project deliverables to help ensure adherence to quality standards, including training materials and operations documentation.

Florida Department of Health (08/2022 to 03/2023)

Sophia worked as the Office of Community Health & Planning Intern. She developed health equitable policies, strategies, and goals to maternal health education programs that target the SDOH and mobilized community health partnership committees to address community health efforts. Sophia evaluated health program strategies and contributed to the collection, policy analysis, interpretation, and dissemination of data to inform stakeholder decision-making. She assessed population health needs through utilizing Mobilizing for Action through Planning and Partnerships (MAPP) framework and developed strategic goals. Sophia monitored programmatic deliverables of tobacco prevention and curated presentations for diverse audiences and utilized data analysis tools and databases for qualitative research (i.e. REDCap).

ScribeAmerica (08/2016 to 03/2017)

As a medical scribe, Sophia developed technical skills on understanding and utilizing EMR/EHR for inpatient and outpatient usage. She documented a detailed patient history, review of systems, procedures performed, and physical exams as directed by a healthcare provider in EMR. Sophia provided patient education based on diagnoses determined by the healthcare provider.

Wylean Thomas
Business Analyst, Policy Program

Wylean is a talented project manager, adept at identifying customer needs and presenting appropriate service offerings. She brings the ability to plan, prioritize, and coordinate large and complex programs as well as achieve organizational objectives by creatively managing, training, and motivating staff. She is an expert in resolving escalated customer service issues and can work effectively at multiple levels of the organization and with multiple project teams.

Years of Applicable Experience: 23
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

BS, Social Work, Talladega College

Key Qualifications

- ❖ 23 years' experience in State Government Medicaid Policy
- ❖ LTSS and ABD eligibility and policy experience
- ❖ Experience with HCBS Waiver policy
- ❖ Experience in claims processing and operations
- ❖ Subject matter expert in ABD Medicaid policy
- ❖ MFP management and program expertise
- ❖ Excellent communication and interpersonal skills

Relevant Experience

BerryDunn (10/2022 to present)

Wylean is a senior consultant in BerryDunn's Medicaid Practice Group. In that role, she acts as a subject matter expert (SME) on a range of Medicaid policy matters and program support. She researches and drafts recommendations on a range of policy matters with a focus on State Plan Amendment (SPA) review for Medicaid compliance and Money Follows the Person (MFP) Demonstration Project. Under MFP, Wylean is responsible for completing reports, quality measurement strategies, and researching and drafting assessments specific to long-term care supports and services and workforce needs. As part of the SPA review team through a PERM error analysis, Wylean researched and identified the Medicaid eligibility errors and drafted recommendations of resolution to help ensure accurate processing of eligibility determinations. Wylean has also worked as a consultant and support on the state plan gap analysis project for PRMP's current state plan.

Georgia Department of Community Health, Service Delivery and Administration Office (07/2019 to 10/2022)

As the Balancing Incentive Program and Money Follows the Person (MFP) manager, Wylean had oversight over the federal program that provided grants to develop and use existing Medicaid resources, such as the HCBS waivers to assist individuals in managing their care outside of a nursing home. This included planning, administering, and controlling the budget for the MFP program; working with options counselors or transition coordinators who assisted in arranging home and community-based services (HCBS) through Georgia's Medicaid waivers; responding to legislative inquiries relative to program admission, services, and constituent concerns/complaints; helping ensure compliance with rules, regulations, and policies related to the MFP program; and coordinating interactions between the Division and other agencies as well as external customers.

Georgia Department of Community Health, Medicaid Policy and Provider Services (07/2014 to 10/2022)

Wylean served as the subject matter expert for all programs assigned, including Nursing Facility Services, Swing Bed Services, and the Nurse Aid Training Program. She led quality improvement initiatives to enhance service delivery efficiencies and effectiveness and achieve healthy outcomes of members.

RSM Outreach Project (11/2010 to 06/2014)

- ✓ *Program Consultant/Manager (10/2012 to 06/2014).*
  Wylean managed two long-term care unit teams as well as a Katie Beckett unit team. This included helping ensure team understanding of policies and procedures, evaluating work activities, reviewing case records, preparing reports, and maintaining current knowledge of Medicaid policies and procedures.

- ✓ *Family Independence Case Management Supervisor (11/2010 to 09/2012).*
  As supervisor of a team of nine, Wylean provided new and veteran staff with in-house training to help ensure cases were processed accurately. She monitored staff, reviewed monthly production reports, compiled and submitted supervisor's monthly report to manager free of errors, and helped ensure hearing notifications were filed timely, and all applicable LTC MES employees were notified of the hearing timely.

Fulton County Department of Family and Children Services (02/2000 to 11/2010)

- ✓ *ABD Medicaid Eligibility Specialist/LTC Unit Interim Supervisor (08/2005 to 11/2010).*
  Wylean performed all LTC supervisory duties, including reading case records for quality control, conducting LTC trainings for nursing facilities and county staff in different regions, providing new employee training and support, evaluating policy and procedures, and applying state and federal policy standards to case situations regarding income and resources.

- ✓ *Medicaid Eligibility Specialist (02/2000 to 08/2005).*
  Wylean assisted clients with all aspects of the application/review process for ABD Medicaid and Food Stamps (interviewing, gathering of needed information, and approving/denying the case). She evaluated policy and procedures to accurately determine eligibility for all Medicaid classes of assistance, extensively documented all Medicaid and SNAP cases, and conducted periodic/special reviews to determine continued eligibility.

Zelma Rivera López
Business Analyst, Program Management Program
Project Coordinator, Certification and Compliance Program

Years of Applicable Experience: 17

Years of Relevant Experience Supporting PRDoH & PRMP: 2

Education and Certifications

Fluent in Spanish and English

BBA, Management Information Systems, University of Puerto Rico

Zelma is an IT professional with experience as a Project Coordinator in the Banking and Pharmaceutical industries. She has specialized in data compilation and analysis, technical documentation, and change control management. She brings excellent communication skills, both orally and in writing, and a proven ability to support clerical work, gather requirements, analyze data, prepare reports, create and update computerized records as well as prepare, edit, and proofread documents, among others. Zelma is fully bilingual in English and Spanish.

Key Qualifications

- ❖ Six months' experience as a business analyst for the Streamlined Modular Certification (SMC) service area supporting the PRMP MMIS Phase III certification
- ❖ 10 years' experience as a business analyst and project coordinator in the IT Project/IT Program office in the pharmaceutical industry, supporting approximately 70 sites in 17 countries
- ❖ Two years' experience as a project coordinator for the PRMP EOMC engagement
- ❖ Extensive experience with software applications, including Microsoft Office (Word, Excel, PowerPoint, Visio, and Project) and Jira® Issue and Project Tracking Software
- ❖ Strong leadership, initiative, and problem solving skills; effective workload organization skills, multitasking ability, and meticulous attention to details
- ❖ Performs well as part of a team and can also carry out tasks with minimal supervision

Relevant Experience

BerryDunn (11/2021 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (11/2021 to present).*

As a project coordinator for the Puerto Rico EOMC engagement, Zelma provides support for the Project Planning, Management, and Oversight service area as well as the Integrated MES Program Management Support service area. Some of her main tasks include:

- ✓ Providing support to the Senior Leadership team and the PgMO team with reports, presentations, research, charts, agendas, calendar scheduling, and communications, among others
- ✓ Managing the engagement's organizational charts, team travel calendar, and office and equipment resources, among others
- ✓ Leading the EOMC Monthly Status Report life cycle and working with all service areas within the engagement to help ensure BerryDunn presents complete and accurate status reports to PRMP; tasks include project scheduling, team communications, milestone timeline updates, and document edits and reviews, among others
- ✓ Leading the monthly invoicing life cycle for both the Puerto Rico EOMC and HIT engagements and working with senior leadership teams from both engagements to help ensure that BerryDunn prepares and delivers the invoices and required documentation accurately and in a timely fashion; tasks include project scheduling, team communications, data gathering and analysis, document compilation, invoice packet assembly, delivering hard

copies to the client, and updating budges, among others

✓ Providing support during the monthly CMS and PRMP MES Status Report life cycle and working with other team members to help ensure that PRMP delivers complete and accurate status reports to CMS; tasks include project scheduling, team communications, call center metrics, and document edits and reviews, among others

Zelma performs business analyst tasks for the PRMMIS Phase III Streamlined Modular Certification project. She currently supports the different system testing activities, working with BerryDunn, PRMP, and vendor resources to help ensure all testing requirements are met and the testing process is successful.

Zelma also serves as an Editorial/Quality Assurance (EQA) Champion within BerryDunn's Medicaid Practice Group (MPG). Some of her duties include:

✓ Serving as an EQA subject matter expert (SME) for questions related to EQA within her practice group

✓ Being an advocate for EQA and helping instill good habits within her practice group to follow current editorial processes and style guidelines

✓ Providing feedback and support for new EQA projects and revisions of current projects

In 2022, Zelma provided support and served as the only local point of contact during the project to open the new BerryDunn San Juan office.

✓ She was responsible for meeting with vendors and technicians, helping ensure that all project tasks were executed properly, and equipping the office with proper office and kitchen supplies, among others. She also helped plan the office opening event, coordinating invitations, travel schedules, executing the different activities of the office open house and reception, etc.

✓ She currently performs office administrative duties for the BerryDunn San Juan office. Tasks include managing the office and kitchen supplies, sending and receiving packages, communicating with and receiving vendors, providing technical support when needed to help ensure that all workspaces are functioning properly, serving as local point of contact with the building administration office on security access and other building-related issues, and helping consultants with their building security access and other office-related issues as needed, etc.

Freelance Social Media Manager (05/2011 to 11/2021)

Zelma has coordinated and managed small social media campaigns and projects for clients such as McDonald's, Johnson & Johnson, and Chef Boyardee. These projects have involved tasks including: preparing and presenting proposals, creating editorial and content calendars, executing projects, creating content, cross-promoting on social media, preparing reports with statistics, analytics, results, etc.

She also served as the Community Manager for Monitor SN, a social media consulting firm, for a temporary project. This included managing social media accounts for client companies as well as content creation, including editorial calendars for each client and each social media platform according to the client's point of view and vision. This included, but was not limited to, post writing, scheduling and editing, and light photo and image editing, etc.

Pfizer Pharmaceuticals, LLC (04/2004 to 03/2011)

As a global IT project coordinator, Zelma participated in the deployment of a new Change Management and Configuration Management system. This included asset data collection, project and process documentations, self-trainings and instructor-led trainings coordination, User Acceptance Testing of data, and post-Implementation support. She also performed assessment and data collection for the Network Qualification and Best Practices documentation of all Latin America sites – approximately 70 sites in 17 countries. The purpose of this project was to create the Network Qualification and Best Practices documentation for all sites, helping ensure that they follow the same standards and procedures.

Zelma also served as the custodian for the Network Qualification and Best Practices documentation for all Puerto Rico sites, for which she helped ensure that all sites contain accurate and up-to-date Site Profiles, Network Topology drawings, and that all devices are included in CMDB and that all changes to the devices follow proper Change Management procedures.

Eli Lilly / Lilly del Caribe (07/2001 to 04/2004)

As a systems analyst, Zelma offered support for applications and employees in the following areas: finance, accounts payable, accounts receivable, general ledger, fixed assets, cost accounting, financial budgeting, purchasing, capital planning, payroll, taxes, and human resources, among others. She prepared various validation-related documents, such as Project Summaries, System Requirements, Standard Operating Procedures (SOP), Security Plans, Test Plans, etc. She also served as point of contact for Finance, Human Resources, and Computer Systems Quality audits, both internally and externally, as well as Sarbanes-Oxley-related documentations and audits, and she provided support with application problems, enhancements, validation and qualification requirements, reviewing and evaluating systems, preparation and execution of test plans and test cases, and general PC and system life cycle needs.

Alex Stern
Staff Consultant, Policy Program

Alex is an experienced project coordinator and policy analyst, specializing in Medicaid agencies and state government work. He has experience providing state agencies and private-sector organizations with a broad range of support, with his extensive background in researching, analyzing, and formulating effective strategies to address complex issues paired with his strong organizational, communication, and problem solving skills. These qualities enable Alex to leverage his expertise to drive impactful change and advance objectives.

Key Qualifications

- ❖ Three years of experience in policy development and analysis
- ❖ Over one year of experience supporting PRMP with State Plan Amendments, Money Follows the Person, and Spenddown
- ❖ MPP, University of New Hampshire Carsey School of Public Policy, Concentration in Strategy, Communication, and Policy Analysis
- ❖ Experience writing, developing, and implementing policy specific to healthcare eligibility

Years of Applicable Experience: 3
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

MPP, Master in Public Policy, University of New Hampshire, Carsey School of Public Policy

BA, Political Science and Justice Studies, Cum Laude, University of New Hampshire

Relevant Experience

BerryDunn (08/2022 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) Services (08/2022 to present).*
Alex serves as a consultant on the PRMP EOMC State Plan Amendment (SPA), Spenddown, and Money Follows the Person (MFP) service areas. He contributes to the research and development of SPAs and performs analysis of gaps in PRMP's current state plan. Alex is also a project coordinator within the SPA service area. He helps produce high-quality deliverables by identifying a structured approach, designing and tracking project schedules, and monitoring project elements.

State and Local Government Project Assistant for the State of New Hampshire (05/2022 to 08/2022)

Alex worked as a policy subject matter expert advocating for Medicaid coverage for prescribed medical formula and foods and also worked with the New Hampshire State Legislator, Congressmen, NH Rare Disease Advisory Council, and Consultants and Policy development experts to address concerns and articulate practical solutions. Alex gathered and analyzed research regarding legislative history, state statues, and Medicaid Policy, and he also assisted in writing legislative language to present before the New Hampshire Rare Disease Advisory Council.

Chisholm Chisholm & Kilpatrick LTD (01/2020 to 08/2021)

As a paralegal, Alex researched, investigated and secured evidence to support clients' claim benefits as well as analyzed legal documents. Alex also assisted attorneys and paralegals with case development, research and arguments for clients while also working to offer an array of highly effective services tailored to clients' needs in the areas of veterans' law, long-term disability, and bequest management.

University of New Hampshire Student Senate (2019 to 2021)

Alex served as a student senator and chairman of the police advisory commission and collaborated with the chiefs of both the University of New Hampshire Police and Durham Police to address student issues such as student arrest rates and student rights. Alex advocated for students and communicated the role and responsibilities of campus and local police departments, and he also organized and facilitated meetings with the Dean of Students, University of New Hampshire Chief of Police, Student Body President and Vice President, and patrol officers from both police departments. Alex also chaired weekly meetings, often with guest speakers.

Rhode Island State Government Internship (05/2020 to 07/2020)

As an intern, Alex identified and developed business recovery policies during the height of the pandemic, coordinated with senior government officials to work on policy innovations and solutions, and provided guidance on policy formulation, policy analysis, and technical policy support.

Criminal Defense Attorney Joanne Stella's Law Office (01/2020 to 04/2020)

As an intern, Alex conducted legal research, client assistance, and basic office work, and he assisted with preparing legal documents. Alex also reviewed law enforcement reports and charges to assist with court proceedings and had the opportunity to observe superior, district, and family court proceedings.

Alexandra Nardo
Staff Consultant, Strategic Planning and Procurement Program

Years of Applicable Experience: 4

Years of Relevant Experience Supporting PRDoH & PRMP: <1

Education and Certifications

BA, Political Science, The Ohio State University

BA, Public Affairs, The Ohio State University

Alexandra is a staff consultant in BerryDunn's Medicaid Practice Group. She brings four years of experience working with state-level agencies, including work in managing grant activities, coordinating community engagement and project and program activities, leading professional development training, and researching policy. Additionally, Alexandra spent five years at the beginning of her career working directly with communities as a teacher. Prior to supporting PRMP procurement service area, Alexandra supported the BerryDunn team providing IV&V services to the Ohio Benefits Program at the Ohio Department of Administrative Services. Alexandra is in the process of obtaining her Project Management Professional® (PMP®) certification through the Project Management Institute®.

Key Qualifications

- ❖ More than three years' experience in policy analysis, program coordination, and project management at a state government agency
- ❖ One year of experience providing IV&V services
- ❖ Community Engagement
- ❖ Research and Writing
- ❖ Grant Development and Management
- ❖ Developing and Delivering Professional Development and Training

Relevant Experience

BerryDunn, Medicaid Practice Group (08/2022 to present)

Alexandra is a staff consultant with BerryDunn's Medicaid Practice Group.

- ✓ *Ohio Benefits IV&V Services (08/2022 to 06/2023).*
  Alexandra was a consultant for the Ohio Benefits Program, providing IV&V services for Ohio's integrated eligibility system. In this role, Alexandra performed project management activities including leading schedule development, status reporting, and the creation of the project's onboarding guide for new and existing staff members. Alexandra performed client relations work, by maintaining active, ongoing, and genuine relationships with leadership in the Ohio Department of Administrative Services. Finally, Alexandra participated in research, development, and writing for the engagement's monthly progress assessment report.

- ✓ *Outcomes-Based Procurement Services (07/2023 to present).*
  Alexandra is a Business Analyst for the PRMP's outcomes-based procurement support. In this role, Alexandra performs project management activities and has supported the coordination, research, and development of an E&E RFI and an Alternatives Analysis.

Ohio Department of Education, Office of Whole Child Supports (06/2019 to 08/2022)

Alexandra served as the Family and Children Community Administrator for the Office of Whole Child Supports. In this role, she led the statewide implementation of the federal provisions in the Every Student Succeeds Act for the educational stability of youth in foster care. She also coordinated family and community engagement policies, programs, initiatives, and grant activities; served as a liaison to the Ohio Statewide Family Engagement Center at The Ohio State University; and wrote policy memos, guidance documents, resource guides, and conceptual frameworks to support education policy and program implementation in Ohio's local school districts.

KIPP: Columbus (08/2016 to 06/2019)

As a lead kindergarten and first grade teacher, Alexandra strategically developed instruction to increase student achievement. This included analyzing student academic data on a weekly basis and developing lesson plans that differentiated student instruction in literacy, math, and personalized learning as well as conducting regular family engagement activities, including home visiting, parent-teacher conferences, and family meetings.

Office of State Senator Peggy Lehner (06/2017 to 08/2017)

As an education policy fellow through the Leadership for Educational Equity, Summer Policy and Advocacy Fellowship, Alexandra synthesized academic research into policy memos that informed the Senator of developments in impending education legislation. She researched Positive Behavior Interventions and Supports (PBIS) and other effective school-based behavioral interventions; scheduled, planned for, and conducted 'interested party' meetings with advocates and state-level representatives; and designed an informational survey using an online platform that was distributed to over 1,000 teachers and administrators statewide to drive policy-making decisions.

Chicago Public Schools (06/2014 to 06/2016)

As an early childhood educator, Alexandra helped design and implement a comprehensive kindergarten readiness assessment system, which was used to track student growth and plan for specialized instruction. She participated in a rigorous training program that combined management, curriculum development, and assessment practices.

U.S. Department of Education (05/2013 to 08/2013)

Alexandra served as an education intern, managing logistics of federal grant programs. She assisted in planning and staffing Department events, served as one of two lead interns in developing a social media campaign, and assisted the Deputy Director of Rural Education with communications initiatives.

Erin Martin, MBA, CAPM
Staff Consultant, Program Management Program

Erin possesses strengths in creativity, adaptability, problem solving, building relationships, and meeting clients' needs. She has proven ability to thrive in fast paced-paced environments while maintaining a high level of professionalism and attention to detail.

Key Qualifications

- ❖ Three years' experience in a Federally Qualified Healthcare Center in Maine
- ❖ Over a year supporting PRMP program management office
- ❖ MBA, University of Maine Business School, Concentration in healthcare systems
- ❖ Certified Associate in Project Management (CAPM®), Project Management Institute®

Years of Applicable Experience: 3

Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

MBA, University of Maine, Concentration in Healthcare Systems

BA, Health Science, Minor in Business Administration, University of Southern Maine, Health Care Administration Track

CAPM®, Certified Associate in Program Management, Program Management Institute®

Relevant Experience

BerryDunn (08/2022 to present)

Puerto Rico Medicaid Program (PRMP) – *Enterprise Objective Monitoring and Control (EOMC) (08/2022 to present).* Erin, as a staff consultant with BerryDunn's Medicaid consulting team, plays a crucial role in the Puerto Rico Engagement (PRMP), specifically focusing on IMES (Infrastructure and Modernization and Eligibility System), PgMO (Program Management Office), and APDs (Advanced Planning Documents) service areas. Her responsibilities involve a range of Project Management activities and client interactions.

One of Erin's primary responsibilities is leading the monthly CMS (Center for Medicare and Medicaid Services) report deliverable. This report is critical communication used to update CMS on the progress of the engagement and keep PRMP compliment with CMS regulations. Erin's role as the leader of the CMS report entails managing schedules, tracking risk and issues, facilitating meetings, and communicating with vendors.

Greater Portland Health (2019 to 2022)

In Erin's work as a human resources assistant, she contacted over 800+ potential candidates via telephone for various positions throughout the company to increase employee recruiting during the pandemic and conducted phone screens within diverse populations and positions. She was responsible for updating insurance plans for over 1,000 patients using NextGen technology, and she also worked collaboratively with providers and hiring managers to schedule interviews via Zoom and Outlook. In the summer of 2019, Erin worked as a marketing intern. She wrote a successful grant for the

purchase of Narcan kits in collaboration with the CEO, tabled at various events to raise awareness of our healthcare resources, provided clerical support for upper-level management, and created and managed a budget sheet for all company grants.

The Landing at Saco Bay (2015 to 2019)

Erin worked as a personal support specialist by providing daily care for up to 16 residents, including bathing, feeding, cleaning, and other daily activities. She maintained confidentiality and HIPAA regulations resulting in the highest quality of care, and she also communicated with doctors, registered nurses, administrators, and other staff members.

Ishara Nanayakkara
Staff Consultant, Program Management Program

Years of Applicable Experience: 1

Education and Certifications

Master of Public Administration, University of Kentucky

Bachelor of Arts, Political Science, Communication, Berea College

Lamdi Pi Eta, Communication Honors Society

Ishara is a staff consultant with the State Government Practice Group, working in Health Information Exchange. She possesses strong communication and problem-solving skills with a fine attention to detail. In addition, Ishara's knowledge of strategic planning, organizational management, and policy analysis lends to her consulting.

Key Qualifications

- ❖ Executive President, Student Government Association 2019-2020
- ❖ Coursework in strategic planning, organization management, quantitative methods of research, public policy economics and policy analysis
- ❖ Experience with research and evidence-based writing
- ❖ Strong leadership skills
- ❖ Experience with STATA, MS Excel, and Adobe Premier Pro
- ❖ Publications range from roles of state legislators in policymaking to the global impact on state and local budgets

Relevant Experience

BerryDunn (06/2023 to present)

Ishara is a staff consultant within the State Government Practice Group, working in Health Information Exchange.

The Council of State Governments (01/2022 to 06/2023)

Ishara was a Roosevelt Fellow and provided researching and writing evidence-based, nonpartisan articles and research briefs for lawmakers. She also assembled biweekly fiscal newsletters for policymakers.

United Nations (06/2019 to 08/2019)

Ishara worked as a summer intern and represented Sri Lanka at meetings at the UN Headquarters.

Student Government Association (05/2019 to 06/2020)

Ishara served as the executive president and represented the student body to trustees, donors, and all external organizations. She implemented and enforced legislation and served as voting member of the General Faculty Assembly and Board of Trustees. Ishara also served as the student representative on the Berea College Executive Council. She organized and chaired Executive Branch Meetings, and she also planned and hosted events for over 1,000 guests.

Political Science Department (01/2018 to 05/2019)

Ishara worked as a teaching assistant and reviewed research papers and assignments, and she also created and graded quizzes, papers, and homework. She reviewed material with students one-on-one and in small groups.

Berea College News and Radio (2018)

Ishara was a radio show host and co-hosted weekly radio shows. She is proficient in using broadcast equipment and software.

Habitat for Humanity (2017)

As a summer intern, Ishara carried out research to include inadequate access to clean water as criteria to provide subsidized housing. She assisted the Fund Development Director in creating a more efficient donor database management system. Ishara represented Habitat for Humanity at events and did front-end client relations work.

Berner Mayens Matias
Project Coordinator, Other EOMC and MITA SS-A

Berner is a project coordinator with experience in defining project requirements, scopes, and objectives that align with organizational goals. He is analytical and organized with the ability to identify needs and implement effective solutions. He leverages experience working on detailed and deadline oriented tasks consistently and efficiently. Displaying strong interpersonal skills, Berner is capable of working both independently and in a team-oriented environment.

Key Qualifications

- ❖ Two years of experience in project management experience, including project coordination.
- ❖ Two years in analyzing Probability, Statistics and Statistical Quality Control
- ❖ Two years of experience in monitoring project progress, project extensions, resource contracts and project invoicing/payments.
- ❖ Two years in participating implementation experience

Years of Applicable Experience: 2
Education and Certifications

Fluent in Spanish and English

Bachelor's Degree in Industrial Engineering expected 2024, University of Puerto Rico

Lean Six Sigma Green Belt

Relevant Experience

BerryDunn (10/2023 to present)

Berner is a project coordinator working in BerryDunn's Medicaid Practice Group.

Johnson & Johnson, Guaynabo, PR (08/2021 to 03/2023)

Berner worked in demand planning and created a backorder tracker tool in excel to monitor product allocation by following supply plans. He updated KPI reports: OTC Inventory, Component's Risk, Product Consumption, End-to-End Capacity, Supplier Backorders, End-to-End inventory, and Weekly Payments reports. He communicated and validated requirements with relevant stakeholders and developed and maintained reporting tools. Berner performed data discovery, analysis, and modeling. He registered new mod codes, supplier/item relationships, pricing, and costs, and he created reports, dashboards, and visualizations to help others understand business performance.

Inteldot LLC, San Juan, PR (01/2021 to 07/2021)

As a project coordinator, Berner led and managed project scopes: definitions, work schedule, project cost, and quality. He monitored project progress, project extensions, resource contracts, and project invoicing/payments. He created a project status report including a weekly and monthly overview, and he conducted weekly/monthly meetings to present projects status, risks, evaluations, and company's departmental metrics. Berner assisted in resolving business issues and metrics improvements using system provided data, and he also served as point of communication between company teams and external resources.

Eileen Gardner
Project Coordinator, Certification and Compliance Program

Eileen is a project coordinator and consultant in BerryDunn's Medicaid Practice Group, focused on providing project coordination and project management support, research, and facilitation. Eileen brings more than 30 years of senior-level office management experience and over 10 years of project management and analysis services to Medicaid clients, including over five years in the Missouri Medicaid Management Information System (MMIS) healthcare application, over four years in the Missouri Eligibility Determination & Enrollment System (MEDES) healthcare application, and one year in the Puerto Rico Department of Health (PRDoH) Enterprise Objective Monitoring and Control (EOMC) project.

Years of Applicable Experience: 11
Years of Relevant Experience Supporting PRDoH & PRMP: 1
Education and Certifications

BGS, University of Missouri – Columbia

Registered Work Comp Specialist – National Council on Compensation Insurance (NCCI)

Key Qualifications

❖ 30+ years of senior-level office management experience in politics, education, insurance, and health and human services

❖ Four years in a large MEDES healthcare application

❖ Five years in a large Missouri MMIS healthcare application setting

Relevant Experience

ECCO Select (12/2017 to present)

✓ **Missouri Department of Mental Health (DMH)** – *MO DMH Electronic Health Record (EHR) Business Planning Project Part I and Part II (10/2021 to present).*
Eileen serves as a part-time project coordinator for the Missouri DMH EHR Business Planning project. She assists the team with editing business processes and performance deliverable plans and recording meeting minutes.

✓ **Puerto Rico Department of Health (PRDoH)** – *Enterprise Objective Monitoring and Control (EOMC) (10/2022 to present).*
Eileen serves as a project coordinator for the PRDoH EOMC project. She assisted the project team through the certification review process. She now assists the Integrated Medicaid Enterprise Systems (IMES) and Payment Error Rate Measurement (PERM) project teams in editing Centers for Medicare & Medicaid Services (CMS) documents, EOMC Roadmap, writing team process documents, updating spreadsheets, and recording meeting minutes.

✓ **MO Information Technology Services Division (ITSD) Office of Administration (OA)** – *Enterprise Resource Planning (ERP) Missouri Vital Enterprise Resource System (MOVERS) Implementation (09/2022 to present).*
Eileen serves as a part-time project coordinator for the MO OA ERP MOVERS Implementation. She assists the Project Manager by drafting and updating the project's Weekly Status Report.

✓ **MO HealthNet Division** – *Missouri Medicaid Enterprise PMO (12/2017 to present).*
Eileen serves as the project coordinator assisting the project manager on a team that assesses project health, reviews project deliverables, evaluates and edits vendor management plans, reviews IV&V progress reports, assists in identifying potential risks and issues, manages the document repository, records meeting minutes, and writes the project's MME PMO Weekly Status Report.

Briljent, LLC – (05/2016 to 12/2017)

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

ENTAP, Inc. (12/2015 to 05/2016)

- ✓ *Division of Family Services – MEDES PMO.*
  Eileen worked as a project coordinator on the MEDES project.

EngagePoint, Inc. (07/2013 to 07/2015)

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

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

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

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

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

U.S. House of Representatives – MO Congressman Kenny Hulshof (11/2004 to 06/2006)

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

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

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

University of Missouri – Columbia

- ✓ *School of Medicine (12/1999 to 04/2002).*
  Eileen provided high level support for the dean of the School of Medicine and assisted in managing the office, travel arrangements and expense reports, and hospital committee assignments.

- ✓ *College of Arts and Science (04/1992 to 06/1999).*
  Eileen provided high level support for the Executive Director of Advancement and managed the college's fundraising goals and objectives. She provided account management, direct mail campaigns, special event planning, management, and event wrap-up for the 31 departments within the organization.

Sophia Zielke
Project Coordinator, Strategic Planning and Procurement Program

Sophia is a consultant in our Medicaid Practice Group, with interests and experience in aging and HCBS program policy analysis and development. She has worked on a range of Medicaid policy projects, most recently a 1915c waiver for children with serious emotional disorders. She has extensive knowledge in social systems and offers a strong research, project management, and data synthesis skillset. Her strong communication skills paired with her organizational strategies that were developed through work in community organizations have enhanced her leadership and project management knowledge base.

Key Qualifications

- ❖ Four years' experience in HHS policy and research
- ❖ Master's degree in public health with a focus in administration and policy

Years of Applicable Experience: 3
Years of Relevant Experience Supporting PRDoH & PRMP: <1
Education and Certifications

Master of Public Health Administration and Policy, University of Minnesota Twin Cities

Bachelor of Science Applied Economics, University of Minnesota Twin Cities

Relevant Experience

BerryDunn (06/2023 to present)

Puerto Rico Medicaid Program (PRMP) (6/2022 to 8/2022, and 7/2023 to present)

As a project coordinator and business analyst for PRMP procurement projects, Sophia assisted with developing an RFP for printing and mailing services for PRMP during her time as an intern. Now as an employee she has worked to develop an RFI for the eligibility and enrollment (E&E) system for PRMP and provide project coordination support for the Enterprise Data Warehouse (EDW) project.

West Virginia Bureau for Medical Services (BMS) – *Children with Serious Emotional Disorder (CSED) Waiver Phase III Project (07/2023 to present).*
As a policy analyst for the CSED Waiver Project, Sophia provides policy research and synthesis support for the State's initiative and contributes to the creation and revision of deliverables such as Waiver amendments, CMS Evidence Requests, and stakeholder engagement documentation.

Institute of Cancer Research Prevention – Minneapolis Masonic Cancer Center (10/2021 to 6/2023)

Sophia serves as a graduate assistant where she prepares communications materials including event publicity, newsletters, research findings, and cancer prevention in a format accessible to the public. She also utilizes interviewing and video skills to create researcher profiles for global leaders in cancer prevention.

International Working Group for Health Systems Strengthening (07/2021 to 1/2022)

As a research assistant, Sophia works alongside global connections, including colleagues from Brazil, Peru, and India to research vaccine equity and the economics behind international vaccination trends. She also coordinates the note-taking processes for key meetings, including 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 to 1/2022)

As an elderly caretaker, Sophia helps residents achieve the highest practical physical, mental, and psycho-social well-being through individual tailored care and attention. She communicates physical and emotional observations of residents to health practitioners to facilitate care plans and continually improves her knowledge of dementia, diabetes, heart disease, and health administration to better serve the needs of residents.

University of Minnesota COVID-19 Modeling Team (04/2021 to 09/2021)

Sophia served as a research assistant and project manager where she conducted biweekly meetings focused on translating the latest modeling projections between the University of Minnesota team and the Minnesota Department of Health. She used her knowledge of statistics and public health to write detailed notes and agendas for meetings focused on predicting COVID caseloads based on behavioral and policy changes.

University of Minnesota Department of Applied Economics (08/2020 to 01/2021)

As a teaching assistant, Sophia assisted Professor Hikaru Peterson in maintaining a positive and organized learning environment during the COVID-19 pandemic for a course focused on food systems in differing geographic and economic regions. She also used her knowledge of food systems, Vensim software, economics, and public health to facilitate classroom learning for over 30 students by providing detailed written and oral feedback.

The Arc Minnesota (06/2020 to 08/2020)

As a microgrants intern, Sophia worked on the implementation and evaluation of a microgrant program for Minnesotans with disabilities, specifically focusing on the areas of housing, community integration, and employment. She created clear and thorough communications content such as press releases and stories tailored for social media after following up with recipients of microgrants. She was also responsible for revising the evaluation and survey process for microgrant recipients to streamline language and improve consistency of feedback.

Minnesota Student Association (10/2018 to 05/2020)

Sophia worked as an outreach coordinator and intern where she organized welcome week recruitment for 6,700 students to effectively communicate advocacy opportunities and worked with 20+ student groups to help ensure effective communication and cooperation on student advocacy. She used her creative communication and coding skills to design the Student Association's website and coordinated a campaign called Celebrate CommUnity, focused on leadership which culminated in an event with 100+ guests in support of a non-profit book publishing company.

Editorial / Quality Assurance

Alycia Minshall
E/QA

Years of Applicable Experience: 11

Years of Relevant Experience Supporting PRDoH & PRMP: 1

Education and Certifications

Master of Arts in English Language and Literature, Central Michigan University

Bachelor of Arts in English, Alma College

Poynter ACES Certificate in Editing

Alycia Minshall is an editing and communications professional with more than 10 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

Key Qualifications

- ❖ More than 10 years of experience in editing, proofreading, and copywriting
- ❖ More than six years of experience in editing for public policy
- ❖ Poynter ACES-Certified Editor
- ❖ Well versed knowledge of Associated Press style, the Chicago Manual of Style, and Modern Language Association style
- ❖ Growing knowledge of accessibility practices and achieving 508 compliance for deliverables
- ❖ Vested interest in editing for diversity, equity, and inclusion principles

Relevant Experience

BerryDunn (08/2022 to present)

Alycia will be working with the BerryDunn team to provide documentation support.

Alycia Minshall Editing Services (03/2014 to present)

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

Public Sector Consultants (04/2017 to 08/2021)

- ✓ *Senior Editor (06/2020 to 08/2021).*
  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 ensure consistency in voice, brand, and tone across messaging channels as well as helping 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 (04/2017 to 06/2020).*
  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 ensure that all materials were well written, accurate, properly researched, objective, concise, and focused, and she helped ensure consistency in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (09/2015 to 06/2016)

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 (08/2013 to 06/2014)

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 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 (01/2012 to 06/2014)

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 she served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (08/2008 to 12/2011)

- ✓ *Student Director (08/2010 to 12/2011)*
  Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center and manage campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.
- ✓ *Writing Center Tutor (08/2008 to 12/2011).*
  Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.

Jordan Ramsey, MA
E/QA

Years of Applicable Experience: 14
Years of Relevant Experience Supporting PRDoH & PRMP: 4

Education and Certifications

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

Jordan is a senior writer/editor in BerryDunn's Consulting Services Team 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 and holds a MA in English (Professional Writing).

Key Qualifications

- ❖ Over fourteen years of editing/teaching experience in the English language
- ❖ Over four years editing government/quasi-government deliverables
- ❖ Knowledgeable in various styles, including AP, MLA, Chicago, and APA
- ❖ Four plus years' experience working on BerryDunn Puerto Rico deliverables
- ❖ Trained in 508 Compliance and knowledgeable of practices to help ensure accessibility in documents
- ❖ Authored many internal training and reference documents on proper formatting, grammar usage, and style
- ❖ Enacted PerfectIt program at BerryDunn to help ensure consistency among all client-facing documents
- ❖ AP Style, grammar, language Subject Matter Expert (SME)
- ❖ Created or co-created nearly 10 presentations over the past four years related to writing, editing, and formatting BerryDunn deliverables
- ❖ Created a new-hire training program to bring onboarded consultants up to speed with our style and expectations for quality and consistency when authoring deliverables

Relevant Experience

BerryDunn (07/2019 to 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.

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.

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 to 2017)

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

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

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

The Southern Illinoisan (2014 to 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 to 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.

Appendix B: Acronyms List

Acronym	Definition
ACA	Affordable Care Act
ADKAR	Awareness, Desire, Knowledge, Ability and Reinforcement
ADR	Additional Documentation Requests
AHCCCS	Arizona Health Care Cost Containment System Administration
AKAIMS	Alaska Automated Information Management System
AoVPN	Always On Virtual Private Networking
APD	Advance Planning Document
APHSA	American Public Human Services Association
ASES	Administración De Seguros De Salud
ASG	Puerto Rico General Services Administration
AU	Annual Update
AVS	Asset Verification System
BA	Business Analyst
BBN	Bankers Bank Northeast
BIS	Business Intelligence Solution
BMS	Bureau for Medical Services
BPM	Business Process Models
BPR	Business Process Redesign
CAA	Consolidated Appropriations Act
CAHPS	Consumer Assessment of Health Care Providers and Systems
CAL-E	Certified Agile Leadership Essentials
CAL-T	Certified Agile Leadership Teams
CAN	Change Agent Network
CAP	Corrective Action Plan
CBH	Community Behavioral Health
CCPA	California Consumer Privacy Act
CDMP	Certified Data Management Professional®
CEF	Conditions for Enhanced Funding
CFE	Certified Fraud Examiner
CFR	Code of Federal Regulations
CHIP	Children's Health Insurance Program
CIO	Chief Information Officer

Acronym	Definition
CIRP	Cybersecurity Incident Response Plan
CIS	Center for Internet Security
CISSP	Certified Information Systems Security Professional
CMCoP	Change Management Community of Practice
CMS	Centers for Medicare & Medicaid Services
CMSP	Clinical Management Services and System for Pharmacy Claims and Prior Authorizations
CPA	Certified Public Accountant
CPEC	Centralized Provider Enrollment and Credentialing
CPRA	California Privacy Rights Act
CPT®	Current Procedural Terminology®
CR	Certification Review
CSC	Critical Security Controls
C-SED	Children With Serious Emotional Disturbances
CSESR	Child Support Enforcement System
CSNI	Client Network Services, Inc.
CVO	Credentials Verification Organization
DAMA®	Data Management Association®
DAS	Department of Administrative Services
DBH	Division of Behavioral Health
DDI	Design, Development and Implementation
DED	Deliverable Expectation Document
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
DHS	Department of Human Services (Iowa)
DHSS	Department of Health and Social Services
DMAHS	Division of Medical Assistance and Health Services
DMAS	Department of Medical Assistance Services
DMMA	Department of Health and Human Services, Medicaid & Medical Assistance
DOH	Department of Health
DR	Difference Resolution
DSS	Department of Social Services
E&E	Eligibility and Enrollment

Acronym	Definition
E/QA	Editorial/Quality Assurance
ECM	Enterprise Change Management
EDS	Enterprise Data Solution
EDW	Enterprise Data Warehouse
EDWS	Enterprise Data Warehouse Solution
EHR	Electronic Health Record
EOHHS	Executive Office of Health and Human Services
EOMC	Enterprise Objective Monitoring and Control
EPMO	Enterprise Project Management Office
ePMO	Enterprise Project Management Office
ERC	Eligibility Review Contractor
ERP	Enterprise Resource Planning
ESC	Executive Services Caribe
EVV	Electronic Visit Verification
FAMIS	Family Assistance Management Information System
FDOH	Florida Department of Health
FFP	Federal Financial Participation
FFS	Fee for Service
FFY	Federal Fiscal Year
FTE	Full Time Employee
FTI	Financial Transaction Information
FWA	Fraud, Waste, and Abuse
GAAP	Generally Accepted Account Principles
GAAS	Generally Accepted Auditing Standards
GAO	Government Accountability Office
GIAC	Global Information Assurance Certification
GLBA	Gramm–Leach–Bliley Act
GPEN	GIAC Penetration Testing Certification
GSNA	GIAC Systems and Network Auditor
HCA	Health Care Authority
HCBS	Home- and Community-Based Services
HCC	Healthcare Compliance and Credentialing
HCS	Health Care Services

Acronym	Definition
HEDIS	Health Care Effectiveness Data and Information Set
HHS	Health and Human Services
HIE	Health Information Exchange
HIPAA	Health Insurance Portability and Accountability Act
HIT	Health Information Technology
HITECH	Health Information Technology for Economic and Clinical Health
HIX	Health Insurance Exchange
HIX/IES	Health Insurance Exchange/Integrated Eligibility System
HMS	Health Management Services
IAPD	Implementation Advance Planning Document
ICD	International Classification of Diseases
IE	Integrated Eligibility
IES	Integrated Eligibility System
IMES	Integrated MES
IP	Internet Protocol
IPERA	Improper Payments Elimination and Recovery
ISO	International Organization for Standardization
IT	Information Technology
ITIL	Information Technology Infrastructure Library
IV&V	Independent Verification and Validation
IVU	Puerto Rico Sales and Use Tax
JAD	Joint Application Design
JRD	Joint Requirements Design
JRP	Joint Requirements Planning
KFF	Kaiser Family Foundation
KOLEA	Kauhale On-Line Eligibility Assistance
KPI	Key Performance Indicator
LIHEAP	Low-Income Home Energy Assistance Program
LOE	Level of Effort
LTSS	Long-Term Services and Supports
MACPAC	Medicaid and CHIP Payment and Access Commission
MAGI	Modified Adjusted Gross Income
MAHIX	Massachusetts Health Insurance Exchange

Acronym	Definition
MARS-E	Minimum Acceptable Risk Standards for Exchange
MCMP	MLC Certified Medicaid Professional
MCO	Managed Care Organization
MDBT	Medicaid Detailed Budget Table
MECL	Medicaid Enterprise Certification Lifecycle
MECT	Medicaid Enterprise Certification Toolkit
MEDES	Medicaid Eligibility Determination and Enrollment System
MEDITI3G	Medicaid Integrated Technology Initiative, 3rd Generation
MEET	Medicaid Eligibility and Enrollment Toolkit
MEME	Medicaid Enterprise Modernization Effort
MEQC	Medicaid Eligibility Quality Control
MES	Medicaid Enterprise System
MESC	Medicaid Enterprise Systems Conference
MFCU	Medicaid Fraud Control Unit
MFP	Money Follows The Person
MGB	MITA Governance Board
MHD	MO Healthnet Division
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MLC	Medicaid Learning Center
MLTSS	Managed Long-Term Services and Supports
MME	Missouri Medicaid Enterprise
MMIS	Medicaid Management Information System
MMISR	Medicaid Management Information System Replacement
MMM	MITA Maturity Matrix
MQD	Med-Quest Division
MSIS	Medicaid Statistical Information System
MSP	Medicare Savings Program
NAICS	North American Industry Classification System
NAMD	National Association of Medicaid Directors
NAMPI	National Association of Medicaid Program Integrity
NASHP	National Academy of State Health Policy

Acronym	Definition
NASPO	National Association of State Procurement Officials
NCQA	National Committee for Quality Assurance
NEMT	Non-Emergency Medical Transportation
NIST	National Institute of Standards and Technology
NMEH	National Medicaid Enterprise Hub
OAPD	Operations Advance Planning Document
OBC	Outcomes-Based Certification
OBP	Outcomes-Based Procurement
OCM	Organizational Change Management
OD	Organization Development
ODM	Ohio Department of Medicaid
OE	Organizational Excellence
OEI	Organization Excellence Inventory
OMES	Ohio Medicaid Enterprise System
OMP	Outcomes Management Plan
ORR	Operational Readiness Review
OTM	Outcomes Traceability Matrix
PACE	Program of All-Inclusive Care for The Elderly
PAPD	Planning Advance Planning Document
PASS	Procurement Acquisition Support Services
PATH	People's Access to Help
PEP	Provider Enrollment Portal
PERM	Payment Error Rate Measurement
PfMT	Portfolio Management Team
PgMO	Program Management Office
PgMT	Program Management Team
PHE	Public Health Emergency
PHI	Protected Health Information
PI	Program Integrity
PII	Personally Identifiable Information
PIU	Program Integrity Unit
PM	Project Management
PMBOK	Project Management Body of Knowledge®

Acronym	Definition
PMI	Project Management Institute
PMO	Project Management Office
PMOG	Project Management Oversight Group
PMP	Project Management Professional®
POA&M	Plan of Action and Milestones
PPMT	Portfolio and Program Management Team
PR	Puerto Rico
PRDoH	Puerto Rico Department of Health
PREE	Puerto Rico Eligibility and Enrollment
PRHIE	Puerto Rico Health Information Exchange
PRMES	Puerto Rico Medicaid Enterprise System
PRMMIS	Puerto Rico Medicaid Management Information System
PRMP	Puerto Rico Medicaid Program
PSTG	Private Sector Technology Group
QA	Quality Analysis
QC	Quality Control
QSHR	Quality Spectrum Hybrid Reporter
QSI	Quality Spectrum Insight
RAC	Recovery Audit Contract
RAI	Request for Additional Information
RAISE	Reforming American Immigration for Strong Employment
RC	Review Contractor
RFI	Request for Information
RFO	Request for Offer
RFP	Request for Proposals
RFQ	Request for Quote
ROE	Rules of Engagement
RTM	Requirements Traceability Matrix
RUP	Registro Único De Proveedores De Servicios Profesionales
RY	Reporting Year
SAP	Security Assessment Plan
SAR	Security Assessment Report
SAW	Security Assessment Workbook

Acronym	Definition
SDLC	Software Development Life Cycle
SED	Serious Emotional Disturbance
SI	Systems Integrator
SIEM	Security Incident and Event Management
SIT	System Integration Testing
SLA	Service Level Agreements
SLC	Service Level Credits
SLT	Service Area Leadership Team
SMA	State Medicaid Agency
SMC	Streamlined Modular Certification
SMDL	State Medicaid Directors Letters
SME	Subject Matter Expert
SMHP	State Medicaid Health It Plan
SNAP	Supplemental Nutrition Assistance Program
SOP	Standard Operating Procedure
SOW	Statement of Work
SPA	State Plan Amendment
SQL	Structured Query Language
SSA	Social Security Administration
SS-A	State Self-Assessment
SURI	Internal Revenue Unified System
TANF	Temporary Assistance for Needy Families
TBD	To Be Determined
TLS	Transport Layer Security
TPL	Third Party Liability
UAT	User Acceptance Testing
URAC	Utilization Review Accreditation Commission
US	United States
VCM	Vendor Contract Management
VSPT	Vulnerability Scanning and Penetration Testing
WBS	Work Breakdown Structure
WG	Work Group

Acronym	Definition
WIC	Special Supplemental Nutrition Program for Women, Infants, and Children
WVCHIP	West Virginia Children's Health Insurance Program