



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

State of West Virginia Delivery Order

Order Date: 06-03-2025

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

Order Number:	CDO 0511 2680 BMS2500000041 1	Change Order No:	Procurement Folder:	1712347
Document Name:	TPL and RAC Reprocurement Assistance Project Ph II		Reason for Modification:	
Document Description:	TPL and RAC Reprocurement Assistance Project Ph II			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way		Master Agreement Number: CMA 0511 HHR2100000003 1	
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kelly (Jimmy) Dowden Requestor Phone: (304) 356-4861 Requestor Email: jimmy.k.dowden@wv.gov <div>2025 FILE LOCATION _____</div>
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount:	\$381,095.00
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Purchasing Division's File Copy

CA 6/11/25

PURCHASING DIVISION AUTHORIZATION
DATE: June 6/12/25
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6-16-25
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Third-Part Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Assistance Project Phase II

Service Period: 06/15/25-06/14/26

Total: \$381,095.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$41,925.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

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

Lead Project Manager: Optional Renewal Year Two

Hourly Rate: \$215.00

195 hours @ \$215=\$41,925.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$7,020.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

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

Engagement Manager: Optional Year Two

Hourly Rate: \$270.00

26 hours @ \$270=\$7,020.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$5,330.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

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

Lead MMIS Project Manager: Optional Renewal Year Two

Hourly Rate: \$205.00

26 hours @ \$205=\$5,330.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$232,180.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

Commodity Line Description: General Project Manager: Optional Renewal Year Two

Extended Description:

General Project Manager: Optional Renewal Year Two

Hourly Rate: \$190.00

1,222 hours @ \$190=\$232,180.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$94,640.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

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

Extended Description:

Project Management Support Staff: Optional Renewal Year Two

Hourly Rate: \$80.00

1,183 hours @ \$80=\$94,640.00



May 15, 2025

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Project Phase II under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated 13 months. BerryDunn agrees to a SOW start date effective June 15, 2025.

Assuming a start date of June 15, 2025, the work would then conclude on June 14, 2026.

Please let me know if you have any questions or if you would like to discuss the content in this SOW. We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:
A handwritten signature in black ink that reads 'Peter Alfrey'.

2DAAA44ADB3A477...

Peter Alfrey

Principal

Berry, Dunn, McNeil & Parker, LLC

207-541-2242

Ok

A handwritten signature in black ink that reads 'Althea Greenhouse'.

As stated in the SOW, Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Project Phase II under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated 13 months. BerryDunn agrees to a SOW start date effective June 15, 2025. Assuming a start date of June 15, 2025, the work would then conclude on June 14, 2026. Please let me know if you have any questions or if you would like to discuss the content in this SOW. We are pleased to have the opportunity to provide these important services to the State of West Virginia.



West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS)

Third-Party Liability (TPL) and Recovery Audit Contractor
(RAC) Reprocurement Assistance Project Phase II

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21*03



Submitted by:

Berry, Dunn, McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
681-313-8905

Nicole Becnel, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
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Peter Alfrey, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
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Submitted On:

May 15, 2025



**Staffing Plan and Scope of Work for the West Virginia Department of Human Services (DoHS),
Bureau for Medical Services (BMS) Third Party Liability (TPL) and Recovery Audit Contractor (RAC)
Reprocurement Assistance Project Phase II**

This scope of work (SOW) describes the tasks Berry, Dunn, McNeil & Parker, LLC (BerryDunn) will perform to assist the West Virginia (State, WV) Department of Human Services (DoHS), Bureau for Medical Services (BMS) with project management of the reprocurement activities for the Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Assistance Project Phase II. Associated work under this project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21*03 BMS Project Management Services contract between Berry, Dunn, McNeil & Parker, LLC and WV BMS.

1.0 Introduction

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

1.1 Key Information

As part of this project, BerryDunn will continue to provide BMS with project management, project coordination support, and conduct research to help facilitate the development of the TPL and RAC Request for Proposal (RFP). This includes working with BMS and its Purchasing Office to gather information and requirements needed to prepare the RFP.

The TPL and RAC Reprocurement Assistance Project Phase II will also aid the State in meeting its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Verify and monitor Medicaid Management Information System (MMIS) and Fiscal Agent operations to ensure transactions are processed in accordance with all relevant federal laws and regulations.
- Improve access to information necessary for Financial Management.
- Enhance cost avoidance capability by improving access to accurate other third-party payer information.
- Establish integration with other entities to further reduce the potential for redundancy of service and payment.
- Establish reporting capabilities to measure compliance with performance measures.



1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, Deputy Commissioner of Policy and Operations, as the BMS Project Sponsor and Diana Bossie, Director of MMIS, as the BMS Project Lead.
- Other BMS project participants will include Jimmy Dowden, Director of Procurement Services, and Stacey Shamblin, Deputy Commissioner of the WV Children's Health Insurance Program (CHIP), Andrew Pack, Director, Office of Program Integrity.
- The BerryDunn leadership team will consist of Nicole Becnel, Principal, as the Engagement Manager (EM), Peter Alfrey, Principal, as Project Oversight, Dawn Webb, Manager, as Lead Project Manager (LPM), and Sarah Vintorini, Senior Consultant, as Project Manager (PM).
- This work will begin upon approval of this SOW at a mutually agreed-upon date and is projected to continue for 13 months.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be made available on the State-designated site and brought to the attention of the BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories and leverage any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize the TPL 2027 Reprocurrency Assistance Project Implementation Advance Planning Document (IAPD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) previously approved the TPL 2027 Reprocurrency Assistance Project IAPD on December 26, 2024, for total state and federal funds in the amount of \$1,220,160 under project identifier WV-2024-11-04-MMIS-IAPD-TPL. The estimated cost of the services delivered under this SOW is \$381,095 (included in the approved Advance Planning Document [APD]). Therefore, any additional scope added to the services provided under this SOW may require the State to update its TPL 2027 Reprocurrency Assistance Project IAPD to allocate additional funds for project management.



2.0 Project Scope and Staffing Plan

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

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

Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p>Service Approach</p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues impacting the timely completion of project work, and will oversee BerryDunn staff, services, and review of deliverables.</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> • D01: Commissioner Briefing <p>Completion Criteria</p> <p>All parties will deem Engagement Oversight complete upon completion of the project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.</p>	<p>Nicole Becnel Eduardo Daranyi Peter Alfrey Emily McCoy Dawn Webb</p>	45
2.0	<p>Project Execution and Control</p> <p>Service Approach</p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will regularly meet with the project sponsor to discuss project status and issues affecting the timely completion of work and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> • Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings, as requested 	<p>Dawn Webb Sarah Vintorini Shelly Schram Elizabeth Vose Megan Blount Jonathan Watkins Jordan Ramsey Caitlin Cabral Janine DiLorenzo Jonathan Williams Alycia Minshall</p>	1,057



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location Facilitating a Project Closeout Meeting prior to the end of the project. Reporting the project closeout activities in the final MSR. <p>Deliverable(s)</p> <ul style="list-style-type: none"> D02: Monthly Status Report <p>Completion Criteria</p> <p>All parties will deem Project Execution and Control complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	Carole Ann Guay KD Dobyne Megan Hamilton Grace Min Hailey Holden Cate Poling Kourtney Kirk Hope Connard Shandia Benke Samuel Kessler	
3.0	<p>Reprocurement Support Services</p> <p>Service Approach</p> <p>BerryDunn will provide the following reprocurement support services, as requested:</p> <ul style="list-style-type: none"> BerryDunn will provide procurement meeting support services as requested by the State including scheduling meetings, preparing meeting notes, and tracking of action items, decisions, risk, and issues for State meetings. BerryDunn will provide Subject Matter Expertise (SME) support for TPL and RAC state and federal regulations, and state procurement requirements. BerryDunn will assist the State with the RFP release by compiling responses to vendor questions and tracking submissions. BerryDunn will assist the RFP Scoring Committee by facilitating meetings, tracking scoring consensus, and maintaining complete and accurate documentation and scoring workbooks. <p>Completion Criteria</p> <p>All parties will deem Reprocurement Support Services</p>	Dawn Webb Sarah Vintorini Shelly Schram Elizabeth Vose Megan Blount Jonathan Watkins	1,450



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
4.0	<p>APD Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will develop APDs and assist in facilitating the approval of APDs to help ensure the project continues to maintain buy-in and financial backing from relevant federal partners. BerryDunn has included hours to support a minimum of two APDs within the budget.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D03: APD Document <p><i>Completion Criteria</i></p> <p>All parties will deem APD Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Dawn Webb</p> <p>Sarah Vintorini</p> <p>Shelly Schram</p> <p>Elizabeth Vose</p> <p>Megan Blount</p> <p>Jonathan Watkins</p>	100
Total Hours			2,652
Total Not-To-Exceed Cost Estimate			\$381,095



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 2 in CMA HHR 21*03.

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

- Commodity Line 15: Engagement Manager (EM) (\$270/hour)
- Commodity Line 14: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 16: Lead MMIS Project Manager (LMPM) (\$205/hour)
- Commodity Line 17: General Project Manager (GPM) (\$190/hour)
- Commodity Line 18: Project Management Support Staff (SS) (\$80/hour)

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
15	EM	\$270	Nicole Becnel	26	\$7,020
14	LPM	\$215	Dawn Webb	195	\$41,925
16	LMPM	\$205	Emily McCoy	26	\$5,330
17	GPM	\$190	Ed Daranyi	26	\$4,940
17	GPM	\$190	Peter Alfrey	65	\$12,350
17	GPM	\$190	Sarah Vintorini	455	\$86,450
17	GPM	\$190	Shelly Schram	520	\$98,800
17	GPM	\$190	Elizabeth Vose	156	\$29,640
18	SS	\$80	Megan Blount	390	\$31,200
18	SS	\$80	Jonathan Watkins	390	\$31,200
18	SS	\$80	Jordan Ramsey	26	\$2,080
18	SS	\$80	Caitlin Cabral	26	\$2,080
18	SS	\$80	Jonathan Williams	26	\$2,080
18	SS	\$80	Alycia Minshall	26	\$2,080
18	SS	\$80	Carole Ann Guay	26	\$2,080
18	SS	\$80	KD Dobyne	26	\$2,080
18	SS	\$80	Megan Hamilton	26	\$2,080
18	SS	\$80	Grace Min	26	\$2,080
18	SS	\$80	Cate Poling	26	\$2,080
18	SS	\$80	Kourtney Kirk	26	\$2,080
18	SS	\$80	Hailey Holden	65	\$5,200
18	SS	\$80	Hope Connard	26	\$2,080
18	SS	\$80	Shandia Benke	26	\$2,080
18	SS	\$80	Sam Kessler	26	\$2,080
Total				2,652	\$381,095



Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

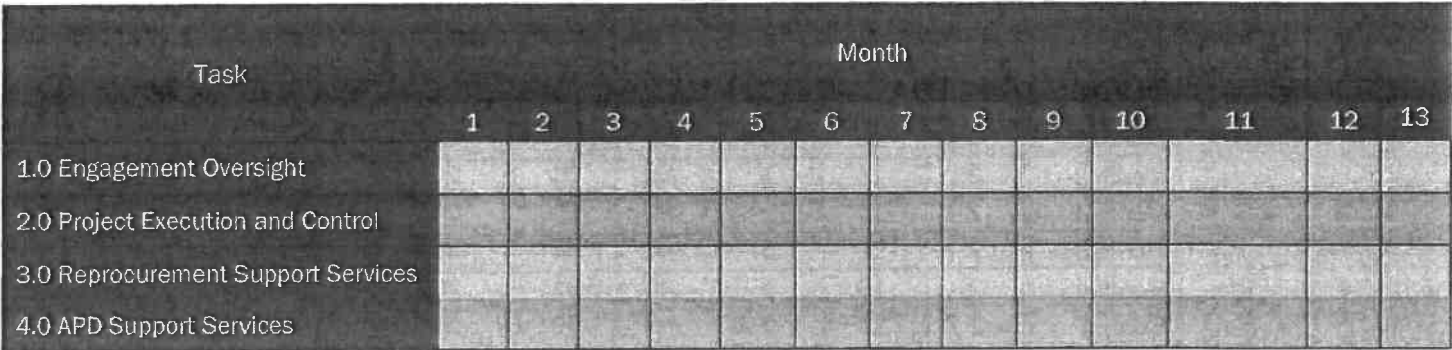
Month	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	2	15	2	94	91	204	\$29,315
Month 2	2	15	2	94	91	204	\$29,315
Month 3	2	15	2	94	91	204	\$29,315
Month 4	2	15	2	94	91	204	\$29,315
Month 5	2	15	2	94	91	204	\$29,315
Month 6	2	15	2	94	91	204	\$29,315
Month 7	2	15	2	94	91	204	\$29,315
Month 8	2	15	2	94	91	204	\$29,315
Month 9	2	15	2	94	91	204	\$29,315
Month 10	2	15	2	94	91	204	\$29,315
Month 11	2	15	2	94	91	204	\$29,315
Month 12	2	15	2	94	91	204	\$29,315
Month 13	2	15	2	94	91	204	\$29,315
Total	26	195	26	1,222	1,183	2,652	\$381,095



4.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





Berry, Dunn, McNeil & Parker, LLC Authorized Signature

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

DocuSigned by:

Peter Alfrey
2DAAA44ADB3A477

Signature

5/15/2025

Date

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

Diana Bonni

Signature

6/2/2025

Date



Appendix A: Resumes



Nicole Becnel, PMP®, ECCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Speech and Hearing Science, University of South Florida

Certified Project Management Professional® (PMP®)

Executive Coaching Certification®

PROPOSED PROJECT ROLE

Engagement Manager

MEDICAID EXPERIENCE

23.5 years

Nicole Becnel has steered a career track for over 22 years leading to her current role as Principal at BerryDunn. Throughout her career, she has consistently demonstrated a deep grasp of processes, policies, analysis, and industry knowledge, earning a brand as an influential leader whose distinction interlaces a broader view of business needs to connect the dots between people, data, technology, and business strategy. This unique strength has enabled a different and fresh perspective in building and leading a Medicaid practice—reaching beyond the traditional role to help clients deliver transformations in their health and human services (HHS) programs. Nicole delivers results with a passion for building and motivating top-performing teams. The combination of Nicole's experience, drive, business savvy, and emotional intelligence has influenced her transformational leadership style. She has shaped a credible executive presence and is credited with playing an instrumental role in BerryDunn's evolution to its now prominent standing as a national leader in the HHS industry. Nicole's talents are exemplified through the partnership with WV Medicaid leadership she championed to initiate a multi-state collaborative where states can share information and brainstorm solutions; Nicole leads the WV project team with this initiative, and since its inception, WV has increased membership to 14 state partners that participate monthly.

KEY QUALIFICATIONS

- 22 years' HHS portfolio, program, and project management experience for single state Medicaid and other HHS agencies
- Large-scale IT and Medicaid Enterprise technical implementation and certification experience
- Currently leading the West Virginia project management (PM) team to support the State with the implementation of a fully integrated eligibility and enrollment solution—one of the first in the nation
- Proven project management track record of over 100 short and long-term projects delivered on time and within budget



- Led the project team that supported the State to secure over \$750M federal dollars for West Virginia's transformation initiatives for their state programs.
- Private Sector Technology Group (PSTG) Past Vice-Chair
- Led the WV PM team, who became one of the first in the nation to help the State successfully implement a Medicaid Management Information System (MMIS) solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers

PROJECT EXPERIENCE

BerryDunn (06/2010 to present)

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

- **West Virginia Department of Human Services (DoHS) Engagement Manager (2012 to present)**
 - *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project Phases III and IV (03/2019 to 05/2021)*
 - *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
 - *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
 - *Managed Care Organization (MCO) Transition Planning Project Phase II (03/2020 to 02/2021)*
 - *MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
 - *Mountain Health Promise (MHP) Implementation Project Management Support (Coordinated Care Management) (03/2020 to 06/2020)*
 - *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase II (10/2019 to 05/2020)*
 - *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
 - *Electronic Visit Verification (WV) Solution Implementation Project (06/2018 to 12/2019)*
 - *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
 - *WVCHIP MCO Transition Planning (01/2019 to 07/2019)*
 - *Provider Enrollment Application (PEA) Year 2 (05/2018 to 05/2019)*
 - *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
 - *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*



- *Technical Information and Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Provider Re-enrollment Application Project (03/2017 to 02/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual (IMM) Update Project (09/2016 to 09/2017)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Updates to Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *Provider Enrollment Application (PEA) Project (2012 to 2015)*
- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*

Additional project details are provided below:

APD Assistance (07/2020 to present)

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

MCO Encounter Data Quality (EDQ) Project (07/2020 to present)

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

PATH DDI Project Management (10/2015 to present)

Nicole is the lead project manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoH's programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy



Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.

EVV Solution Implementation Project (03/2018 to 06/2023)

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

Provider Management Support (07/2019 to 01/2021)

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

WVCHIP Operational Readiness Review (ORR) (12/2019 to 10/2020)

Nicole was the lead project manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and prepared an ongoing performance monitoring transition plan and facilitate a virtual MCO systems review to assist WVCHIP in assessing MCO readiness.

COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020)

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

MHT MCO Procurement Assistance Project Phases I II (07/2019 to 09/2020)

Nicole was the lead project manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add CHIP to the program. BerryDunn assisted the State with developing an RFP to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at



over \$5 billion and promoted increased quality of care and health outcomes as well as data quality and efficiency for the State's managed care populations.

MHP Implementation Project Management Support (03/2020 to 06/2020)

Nicole was the lead project manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care and adoption assistance, as well as those enrolled in the CSED 1915(c) waiver.

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 01/2020)

Nicole was the lead project manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She led the organization development planning to support WV's MITA maturity and modernization efforts. The team created a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project took the MITA SS-A findings and focused on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarified BMS's short-term and long-term strategic goals and helped BMS request enhanced federal funding to achieve those goals.

SUD Waiver Initiative Project (07/2016 to 06/2017)

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

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

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

5010 Refresh Project (10/2011 to 08/2013)

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

Provider Enrollment (PEA) Project (07/2011 to 12/2012)

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

Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011)



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

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

MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)

As engagement manager working with DMAHS, New Jersey's single state Medicaid agency, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the leverage and reuse, testing, and certification project activities.

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

– Project Manager for MIHMS Provider Enrollment

Nicole served as project manager and SME for the Maine Department of Health and Human Services (DHHS), Maine's single state Medicaid agency, provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.

– WV MMIS

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

– Contract Configuration and Reports Lead for WV MMIS

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

– Project Management Support

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

PRESENTATIONS

- "Modularity GPS: Defining the Road map and Understanding the Landscape," Presentation for MESG 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 08/16/2016
- "Managing in a Modular MMIS Implementation," Presentation for MESG 2014, 08/21/2014



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

MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Healthcare
Leadership, Wheeling
Jesuit University

AAS, Office
Administration, West
Virginia University at
Parkersburg

Certified Project
Management
Professional® (PMP®)

Certified Professional
Coder (CPC), American
Academy of Professional
Coders

Certified Outpatient Coder
(COC), American Academy
of Professional Coders

Prosci® Certified Change
Practitioner

Lean Six Sigma Green
Belt Certification (LSSGB)

PROPOSED PROJECT ROLE

Lead Project Manager

MEDICAID EXPERIENCE

21 years



Dawn Webb is a manager in BerryDunn's Medicaid Practice Group (MPG), providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 30 years of experience in medical claims processing and revenue cycle management, including nine years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advance Planning Documents (APDs). Dawn's 15 years of project management experience, coupled with her certifications as a Certified Professional Coder, a Certified Outpatient Coder, and a Prosci® Certified Change Practitioner, provides a unique perspective to clients across the Medicaid enterprise.

KEY QUALIFICATIONS

- 30 years of experience in Current Procedural Terminology (CPT) coding, Current Dental Terminology (CDT), Healthcare Common Procedure Coding System (HCPCS) coding, Internal Classification of Diseases Ninth Revision (ICD-9) coding, ICD Tenth Revision (ICD-10), Diagnosis Related Grouping (DRG) calculations, National Correct Coding Initiative (NCCI) editing, and Electronic Data Interchange (EDI) transactions
- 30 years of experience applying medical and dental coding reimbursement methodologies
- 15 years of project management experience for government and private entities
- 12 years of experience working within WV's MMIS, including system configuration, system analysis, and MMIS configuration validation against Medicaid policies
- Seven years of experience leading and supporting West Virginia Payment Error Rate Measurement (PERM) cycles
- 12 years of experience analyzing the MMIS for potential cost savings



PROJECT EXPERIENCE

BerryDunn (08/2017 to present)

– Detroit Wayne Integrated Health Network (DWIHN)

Medicaid Claims Audits (10/2024 to present)

Dawn serves as an engagement manager overseeing the auditing services of DWIHN's Medicaid claims. She coordinates BerryDunn resources to help ensure work is completed in an efficient manner as well as coordinating the auditing activities with DWIHN leadership.

– West Virginia Bureau for Medical Services (BMS)

Client and Engagement Operations Program Manager (01/2024 to present)

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

Partnership Management Support Project (12/2023 to present)

Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.

APD Assistance (05/2023 to present)

Dawn currently manages the BerryDunn team for the WV Engagement, providing support with facilitating the development and approval of APDs for the Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs and annual and as-needed updates to 10 established APDs.

Quality Improvement Initiatives Portfolio Manager (05/2019 to present)

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

- IT Control Environment Review (07/2024 to present)
- Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2024 to present)
- System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
- Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (04/2024 to present)
- Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2021 to present)
- State Plan Review and Support (SPRS) Project (02/2020 to present)
- MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 to present)
- Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to present)
- Public Health Emergency (PHE) Support Project (12/2021 to 12/2024)
- Data Improvement Project (09/2019 to 06/2024)



- Provider Management Support Project (11/2019 to 10/2023)
- Third-Party Liability (TPL) Options Analysis and Procurement Assistance Project (05/2019 to 03/2022)
- Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022)

PERM Project (05/2018 to present)

Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV.

Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

MMIS Fee Schedule and Edit Quality Review (09/2017 to 04/2023)

Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborated closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup followed Medicaid policy and to provide analysis of cost savings opportunities for BMS.

– Colorado Office of State Auditor (OSA)

Medicaid Recovery Audit Contractor (RAC) Program Evaluation (09/2023 to 01/2025)

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

– United States Virgin Islands (USVI) Department of Human Services

Enterprise Portfolio Management Office Project (10/2022 to 10/2024)

Dawn supported USVI with the development and approval of APDs to support key program initiatives. Dawn also provided project management support for key initiatives to support and enhance the USVI Medicaid program.

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

Organizational and Business Process Redesign (11/2021 to 06/2022)

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

– Alaska Division of Legislative Audit (DLA)

NCCI Compliance Evaluation (07/2019 to 09/2019)

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

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

Dawn served as the revenue cycle administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications



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

Unisys (06/2004 to 11/2009)

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

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

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

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

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

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

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

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

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

Acordia National (12/1994 to 05/1996)

Dawn began her career as a medical claims examiner.

PUBLICATIONS AND PRESENTATIONS

- *Keeping the PERM Manual Update in focus during the PHE*, a BerryDunn blog, September 2020



Emily E. McCoy, RN, BSN, PMP®

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC



Emily McCoy is an experienced project manager and registered nurse with deep expertise in healthcare consulting, including long-term care (LTC) and Medicaid/Medicaid Management Information Systems (MMIS). Her clinical experience includes direct care for individuals requiring skilled and LTC services, inpatient behavioral health services, and neurological care. Emily also has over 25 years of combined program management, project management, and leadership experience for both private and public sectors, including hospitals and state health and human services (HHS) agencies, of which over 13 years was spent working in Medicaid and MMIS as an employee of the West Virginia Department of Human Services (DoHS).

EDUCATION AND CERTIFICATIONS

BS, Nursing, Marshall University

Registered Nurse

Certified Project Management Professional® (PMP®)

Executive Coaching Certification

PROPOSED PROJECT ROLE

Lead Medicaid Management Information System Project Manager

MEDICAID EXPERIENCE

22 years

KEY QUALIFICATIONS

- More than 13 years supporting and leading Medicaid projects within the WV MMIS, with the last two and a half years as the WV Director of MMIS Operations
- More than four years supporting and leading Medicaid policy for LTC, Pre-Admission Screening and Resident Review (PASRR), hospice, and home health programs as an employee of the West Virginia Bureau for Medical Services (BMS)
- Over two years of experience leading the Transformed Medicaid Statistical Information System (T-MSIS) efforts as the WV state representative, working in collaboration with the Centers for Medicare & Medicaid Services (CMS), various technical assistance groups (TAG), and the MMIS vendor
- Design, development, and implementation (DDI) experience with four large-scale MMIS implementations, in various roles, such as LTC subject matter expert (SME), User Acceptance Testing (UAT) lead, and project manager (WV and New Jersey)
- Nearly three years of project management experience with a large-scale integrated eligibility system in WV, known as People's Access to Help (PATH)
- Over 20 years of experience interacting and collaborating with federal agencies, such as CMS
- Experience leading enterprise-wide portfolio management



- Over 15 years of experience with Minimum Data Set (MDS) coordination, including the use of MDS assessments and Resource Utilization Groups (RUGs) in Medicaid rate setting and claims processing.
- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the Private Sector Technology Group (PSTG)

PROJECT EXPERIENCE

BerryDunn (07/2016 to present)

Emily serves as a senior manager in BerryDunn's Medicaid Practice Group, bringing her years of experience to state Medicaid agency clients, particularly in the MMIS area. Throughout her role, Emily has provided support to BMS, WV's single state Medicaid agency.

– West Virginia Department of Health Facilities (DHF)

Contract Labor Management Services (CLMS) Request for Proposal (RFP) Development (07/2024 to present)

– West Virginia Department of Human Services (DoHS)

Portfolio Manager and Deputy Engagement Lead – WV Engagement: Portfolio Management Office (11/2023 to present)

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

- *Organizational Development Phase II (07/2024 to present)*
- *IT Control Environment Review (07/2024 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases IV and V (11/2023 to present)*
- *System Development Lifecycle (SDLC) Coordination Project Phase I (06/2024 to present)*
- *Medicaid and WVCHIP Enterprise System (MCES) Procurement Assistance Project Phase II (06/2024 to present)*
- *Medicaid Information Technology Architecture (MITA) SS-A Maintenance and Annual Update Assistance Project (06/2024 to present)*
- *Advance Planning Document (APD) Assistance Phase II (06/2024 to present)*
- *Partnership Management Support Project Phase II (06/2024 to present)*
- *Payment Error Rate Measurement (PERM) Project Reporting Year (RY) 2026 (06/2024 to present)*
- *Technical and Program Support Project (TAPS) Phases V and VI (11/2023 to present)*
- *PATH Project Management Phase III (06/2024 to present)*
- *Child Welfare Initiatives Project Management Services Phase V (06/2024 to present)*
- *State Plan Review and Support Project Phase II (06/2024 to present)*
- *ARPA Section 9817: Home and Community Services (HCBS) Implementation Project Phase II (06/2024 to present)*
- *Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Phase III (06/2024 to present)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase V (06/2024 to present)*



- *1115 Demonstration Behavioral Health Project (06/2024 to present)*
- *Programmatic Managed Care Support (06/2024 to present)*
- *Justice-Involved Program Support Phase I (06/2024 to present)*
- *Mental Health Parity (MHP) and Behavioral Health Support (BHS) Project Phase III (06/2024 to present)*
- *Women, Infants, and Children Nutrition Program (WIC) Product Management Office (PMO) Phase III (11/2023 to present)*

Eligibility and Enrollment Implementation Assistance (01/2018 to 12/2022)

Emily was the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including requirements and design, deliverables, testing, organizational change management (OCM), and certification and compliance. Emily was able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

Public Health Emergency (PHE) Support Project (10/2021 to 07/2022)

Emily served as a SME for the PHE “Unwinding” project. Emily’s State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help with the unwinding efforts and get the policies and eligibility processes back to a pre-COVID state once CMS determined that these PHE flexibilities will end.

Portfolio Coordination and Management (PCM) (11/2020 to 10/2021)

Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily’s State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.

Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020)

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

– New Jersey Department of Human Services (DHS)

MMIS Modernization (07/2022 to 12/2023)

Emily served as the engagement manager for the PMO in collaboration with the Implementation Team Office (ITO). The MMIS Modernization was the opportunity for DHS, NJ’s single state Medicaid agency, to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily led a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, APD support, MITA support, and change control.

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



MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018)

Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey ITO, for the Replacement MMIS (R-MMIS). She applied her WV MMIS testing experience to the implementation of the New Jersey R-MMIS.

– Henrico County, VA

Henrico Area Mental Health and Development Services (HAMHDS) Electronic Health Record (EHR) System Consulting (08/2016 to 04/2017)

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

WV Department of Health and Human Services (DHHR) [DoHS], Office of Management Information Services (OMIS) (11/2013 to 06/2016)

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

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

WV Bureau for Medical Services (BMS) (01/2003 to 10/2013)

During her 10 years with BMS, WV's single state Medicaid agency, Emily held multiple positions, as described below.

– MMIS (01/2007 to 10/2013)

Emily served as the manager of operations with the MMIS with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including LTC and hospice services.

– Office of Behavioral and Alternative Health Care (01/2005 to 12/2006)

Emily served as program manager of the State Medicaid LTC Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers



regarding State Medicaid policies and reimbursement.

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

Emily served as a health and human resource specialist in the State Medicaid LTC Program with overall duties involving the supervision and oversight of claims processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the MDS, billing, and medical eligibility.

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

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

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

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

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

– Neuroscience Unit (01/1998 to 05/1999)

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

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

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

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



Eduardo "Ed" Daranyi, M.Ed., PMP®

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



Ed Daranyi is a principal and leads BerryDunn's Medicaid Practice Group (MPG) Consulting Team. He has provided executive leadership for Medicaid agencies across the country for over 20 years. Ed offers expertise in managing large-scale technology initiatives, quality assurance, strategic planning, business process improvement, procurement, vendor negotiations, and engagement oversight. He brings successful teams together with experience managing large-scale technology initiatives and policy implementations, utilizing project management best practices on all his engagements, helping to ensure clients benefit from the breadth of deep expertise BerryDunn must provide.

EDUCATION AND CERTIFICATIONS

M.Ed., Education, Lesley College

BS, Physics,
Mathematics, Business
Administration, Hillsdale
College

Certified Project
Management
Professional® (PMP®)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

24 years

KEY QUALIFICATIONS

- Senior project management professional, providing principal oversight in over 100 Medicaid projects, leading BerryDunn's MPG with a management team of 34 and over 134 full-time consultants
- 25 years of project manager experience, including 17 years as a Certified PMP®
- Nearly 20 years of health and human services (HHS) and Medicaid consulting experience on small and large projects, some impacting up to 60% of a state's population
- Over 10 years' experience working as a consultant, engagement manager and project manager for West Virginia Medicaid-related engagements/projects
- Six years working for a Medicaid solution vendor in pharmacy benefits management, preferred drug list management, prior authorization systems, drug rebate negotiations, long term care plan development, and medical claims management capacity

PROJECT EXPERIENCE

BerryDunn (09/2005 to present)

Principal – MPG Lead (2014 to present)

As the leader of BerryDunn's MPG, Ed works with seven other principals to oversee all Medicaid projects, including managing risks, staffing/hiring, workload balance, strategy, pricing, contract negotiation, staff development, and business development. Ed's leadership has led to the growth of the Medicaid practice from two consultants in 2005 to over 135 team members in 2024.



His role as the MPG lead involves oversight for the preparation and implementation of an annual business plan, hiring of new resources, coordination of those resources across a national practice, development of staff, and client engagement support. He helps ensure that all projects are successful and client-focused, and that project resources are allocated to the appropriate interests of the client.

Under his guidance, the practice responds to emerging trends and helps Medicaid agencies respond to policy changes such as the American Recovery and Reinvestment Act (ARRA), the Affordable Care Act (ACA), Substance Use Disorder (SUD) waivers, and Public Health emergencies, as well as state policies.

Ed leads various initiatives internal to BerryDunn, including founding the Learning & Development (L&D) Department and serving as its chairperson. He led the search for the Director and worked with her to establish the program and reinforce good staff development, which ultimately benefits BerryDunn's clients. With the L&D Director and the L&D committee, they developed behavioral competencies which are used as a firm-wide guide for performance feedback and individual development planning.

Ed has developed deep relationships with the Center for Medicare & Medicaid Services (CMS). He serves with other MPG leaders as a trusted partner to CMS, providing quarterly reporting on system modernization efforts, ongoing projects, and any changes to certifications. He has overseen several pilot programs with CMS related to certification of states' systems.

– West Virginia Department of Human Services (DoHS)

Engagement Manager (2012 to 2021), Contributing Principal (2021 to present)

In his role as engagement manager, Ed provided oversight of BerryDunn's contract with the Bureau for Medical Services (BMS) to provide project management services for multiple projects, including the eligibility and enrollment system modernization, Molina Health PAS Medicaid Management Information Services (MMIS) implementation; Medicaid DW/DSS implementation; SUD 1115 Waiver development and implementation; ACA planning, analysis, and advisory services; procurement projects; ICD-10 implementation; Adult Quality Measures; CMS advance planning development (APD); CHIP claims system planning, implementation, and stabilization; access to care planning and monitoring; provider re-enrollment; state self-assessments (SS-As); and other related initiatives.

Since Ed joined the WV project on a full-time basis in 2012, he has held many roles including engagement manager, lead project manager and general project manager. In 2012, he took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for WV, several of which are described below. He now contributes to WV as a contributing principal, assisting in oversight of the many ongoing projects in that engagement.

SUD Waiver Initiative Project (02/2016 to present)

As engagement manager, Ed and the BerryDunn team of specialists developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV



can test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

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

Data Visioning and Warehouse Development and Procurement Assistance Project (2012 to present)

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

WVCHIP Operational Readiness Review (ORR) (2019 to 2022)

Ed was the engagement manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an ongoing performance monitoring transition plan and facilitate a virtual MCO systems review to assist WVCHIP in assessing MCO readiness.

WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 2022)

Ed provided engagement management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders; and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of



the January 1, 2021, go-live date.

People's Access to Help (PATH) DDI Project Management (10/2017 to 2021)

Ed, alongside other principals engaged in work for the State, provided strategic direction and oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's human services programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provided executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables were met, and risks and issues were appropriately escalated and addressed.

Quality Assurance (QA) Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)

Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA National Provider Identifier (NPI). Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development. The project was delivered on time, with no change request, and on budget.

Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:

- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *SUD Waiver Initiative Project (03/2019 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *MCO Transition Phase II (03/2020 to 02/2021)*
- *WVCHIP MCO ORR Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase II (10/2019 to 05/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*



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- *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*
 - *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)*
 - *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*
 - *Provider Enrollment Application (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
 - *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
 - *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
 - *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
 - *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
 - *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
 - *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
 - *WV/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
 - *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
 - *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
 - *Updates to WV Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
 - *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
 - *Safe at Home APD Update (08/2015 to 11/2016)*
 - *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
 - *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
 - *Eligibility and Enrollment APD (06/2015 to 09/2015)*
 - *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
 - *5010 Refresh Project (2012 to 2015)*
 - *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
 - *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
 - *MITA 3.0 Organizational Redesign (2013)*
 - *Policy Workflow Assessment (2013)*
 - *Prior Authorization Forms Revisions (2013)*
 - *ePrescribing Helpdesk and Support (2012)*
 - *Ohio Department of Medicaid (ODM)*



Ohio Medicaid Enterprise System (OMES) Independent Validation & Verification (IV&V) Services (12/2016 to 06/2018)

BerryDunn provided IV&V support for ODM in implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project. As project principal, Ed was responsible for the forming of the project team and initiating the project. Ed met with the Ohio sponsor monthly to review the project status and review identified risks, issues, and recommendations to mitigate those risks and issues. He oversaw the BerryDunn team helping ODM ensure a modular approach and implementation that will work for Ohioans and support ODM's modular certification process, including applying to Outcomes-Based Certification (OBC) approach. Ed monitored risks and mitigated exposure to the client, project, and firm. He managed the project and teamwork and facilitated appropriate stakeholder discussions, implementing smart practices. Ed helped ensure that all reporting was submitted accurately and timely to CMS. Ed transitioned from this project in 2018 to allow a new principal to establish and grow the relationship with the client.

– Maine Department of Health and Human Services (DHHS)

IV&V, QA, and Technical Assistance (TA) Services (04/2008 to 06/2012)

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

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

– North Carolina Office of the State Auditor

Independent Audit of the State IT Services EPMO (04/2007 to 06/2007)

Ed was the lead analyst for the North Carolina Office of the State Auditor in charge of conducting an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of the Medicaid North Carolina Families Accessing Services through Technologies, a program designed to improve the way North Carolina DHHS and county departments of social services do business. The Auditor's Office utilized the evaluation report to adjust their teams and processes, developing a plan based on the outcomes of our reporting.

– Martin's Point Health Care

HIPAA Compliance Planning and Implementation (2005 to 2007)

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



implementation of the new procedures.

Goold Health Systems (GHS) (now known as Change Healthcare) (1999 to 2005)

GHS is a leading provider of services to Medicaid agencies across the nation. Ed served as strategic project manager, technical writer, office manager, and training coordinator, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. As a result of the growth experienced while working as a strategic project manager, and in his office manager role, Ed oversaw a move of over 200 employees from one office into a larger office complex. His training role included developing trainings for systems such as prior authorization processes and customer service and human resources related trainings for the pharmacies affiliated with GHS.

– Iowa Department of Human Services (DHS)

Pharmacy Benefit Management Implementation Project Manager (06/2004 to 08/2005)

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

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

– Maine DHHS

Implementation Project Manager (05/2001 to 01/2002)

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

Electronic Data Systems (1985 to 1988)

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

PUBLICATIONS AND PRESENTATIONS

- *Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014
- *Project Management/Testing*, Presentation for NESCSO workshop (2017)
- Moderator, MESC Conference sessions (2015-2019)



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- *People and processes: Planning health and human services IT systems modernization to improve outcomes, 11/23/2020 Blog*
 - *Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together towards the future and MESC 2020, 2021, 2022, and 2023 reflections*



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

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, Organizational
Management, Husson
University

MA, History, Providence
College

BA, Journalism and
Communication, Spanish
Minor, University of
Oregon

Certified Project
Management
Professional® (PMP®)

Lean Six Sigma Green
Belt (LSSGB)

Prosci® Certified Change
Practitioner

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

11 years

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

KEY QUALIFICATIONS

- Certified Project Management Professional® with over 17 years of project management experience
- Over 17 years of healthcare operations experience; 10 years of Medicaid experience
- Over 9 years of government HHS consulting experience
- Experience leading Medicaid system implementations, data management initiatives, and program Medicaid enterprise systems implementations in states such as Washington, Maryland, Vermont, New Jersey, and West Virginia

PROJECT EXPERIENCE

BerryDunn (03/2014 to present)

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



– West Virginia DoHS, BMS, and West Virginia Children's Health Insurance Program (WVCHIP)
BerryDunn Project Management Office (10/2014 to present)

Peter provides strategic direction for BerryDunn's West Virginia engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include, but are not limited to:

- *Programmatic Managed Care Support (06/2024 to present)*
- *Partnership Management Support Project (06/2024 to present)*
- *People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019; 06/2023 to present)*
- *Substance Use Disorder Waiver Initiative Project (07/2017 to 03/2019; 06/2023 to present)*
- *Medicaid Enterprise System Modernization Strategy and Procurement Phases I, II, and III (10/2020 to present)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 to present)*
- *Mountain Health Trust MCO Procurement Assistance Project 06/2019 to 06/2021; 12/2023 to 06/2024)*
- *Incident and Case Management System Procurement Assistance (02/2023 to 06/2024)*
- *Public Health Emergency (PHE) Support Project (12/2021 to 06/2024)*
- *Data Improvement Project Phases I, II, III and IV (09/2019 to 06/2024)*
- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to 09/2022)*
- *Mental Health Parity Compliance Analysis (05/2020 to 09/2022)*
- *Contact Tracing (04/2020 to 09/2022)*
- *WVCHIP Out-of-Pocket Maximum Project (05/2021 to 06/2022)*
- *MCO Encounter Data Quality Phases I and II (06/2020 to 02/2022)*
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 06/2021)*
- *WVCHIP Operational Readiness Review (09/2020 to 01/2021)*
- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018)*
- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 to 12/2016)*

– Washington Health Care Authority (HCA)

Public Health Emergency Unwind Project (03/2023 to 12/2023)

Peter served as engagement manager for the project helping support HCA, Washington's single state Medicaid agency, with PHE unwind efforts by overseeing the BerryDunn project team's project deliverables and reporting; coordination of Washington inter-agency meetings and information sharing; and stakeholder management.

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



MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017)

Peter supported DMAHS, New Jersey's single state Medicaid agency, with testing efforts for New Jersey MMIS implementation in areas such as system integration testing (SIT) test case and results review, SIT test case analysis, user acceptance testing (UAT) support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.

– Vermont Green Mountain Care Board (GMCB)

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

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

– Maryland Health Benefit Exchange (HBE)

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

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

Martin's Point Health Care (12/2008 to 03/2014)

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

Health Dialog (01/2006 to 11/2008)

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

Ernst & Young (12/2002 to 12/2005)

As the communications and pursuit strategist, Peter managed internal activity and coordination for strategic new business pursuits that offered tax and audit services to Ernst & Young's existing internal audit clients and managed the creative services team on production of all press, client, and internal materials.



Cisco Systems, Inc. (11/2000 to 04/2001)

Peter served as the public relations manager for the Customer Contact Business Unit (CCBU)/Internet Communications Software Group (ICSG), during which time he managed CCBU on press and analyst activities, including product launches, customer and partner announcements, and other CCBU-related programs. He also managed a public relations agency in execution of press and analyst activity, creation of written materials, industry event coordination, and all CCBU public relations initiatives. He created product and business unit messaging and positioning, drove CCBU public relations strategy, and worked with Cisco marketing teams, CCBU/ICSG executives, and corporate public relations on all public relations initiatives.

Text 100 Corporation (01/1998 to 11/2000)

While working as an account manager, Peter helped to ensure the execution of approved public relations strategic plans and initiatives, as well as core public relations activities. He counseled clients on messaging and positioning, drove account strategy and tactics, including all press and analyst activity, creation of all client materials, industry event coordination, and all client global public relations initiatives, and co-developed all annual and quarterly strategic plans and initiatives.

Davé and Balrey Communications (03/1997 to 12/1998)

While working as an account executive/account manager, Peter oversaw the execution of public relations plan activities and initiatives for a technology client base of Netmosphere Inc., Intergraph Computer Systems, eCommerce, and Warp Drive Networks. He developed relationships with top-tier media and analysts through client product launches, customer and partner announcements, and other client initiatives.

Copithorne and Bellows Public Relations (05/1995 to 03/1997)

Peter worked as an account coordinator, where he supported day-to-day account administration, provision of information for the collation of reports for client base of Hewlett-Packard Company (corporate desktop and notebook PCs), and EIZO Nanao Technologies.

PUBLICATIONS AND PRESENTATIONS

- Facilitator, Session, *Organization Excellence: A Key Ingredient for a Successful Effort to Modernize the Medicaid Enterprise*, representatives from Iowa and West Virginia, New England States Consortium System Organization (NESCO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024
- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCO MESC in Denver, Colorado, featuring representatives from Hawaii, New Jersey, Oregon, and West Virginia (08/2023)
- Facilitator, Workshop: *Outcomes Based Certification*, MESC, Boston, Massachusetts, 08/2021
- The *2020 Final Rule—Understanding new flexibilities to control costs and deliver care*, a BerryDunn blog, 11/2020
- Podcast, *Medicaid and Children's Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools*, 11/2020
- Podcast, *Resumption of Normal Operations: PHE Considerations for States*, 09/2020
- *COVID-19 and Opportunities to Reboot Managed Care*, a BerryDunn blog, 09/2020
- *The Case for Data Governance in the Modular Medicaid Enterprise*, a BerryDunn blog, MESC, 09/2016



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- Session abstract, *State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for partnership and collaboration, leverage and reuse* selected by NESCSO organizers for the MESC conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016
 - *Innovation in a Digital Era: Using Data to Pivot to “the New”* presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016.



Sarah Vintorini

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BS, Business
Administration and
Marketing, West Virginia
State University

Medicaid Learning Center
(MLC) Certified Medicaid
Professional (HIT &
MCMP II)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years



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

KEY QUALIFICATIONS

- 20 years of experience in non-profit and governmental marketing and communications
- 17 years of experience in strategic planning and community needs assessments
- 10 years of experience in corporate event planning
- Eight years of experience in non-profit project management

PROJECT EXPERIENCE

BerryDunn (11/2019 to present)

– West Virginia Department of Health Facilities (DHF)
Contract Labor Management Services (CLMS) Request for Proposals (RFP) Development (08/2024 to present)

Sarah provides project management for the CLMS RFP Project. Sarah manages a team that developed and released a detailed RFP, as well as facilitated the group scoring process to help ensure proposal state procurement procedures were followed throughout the process.

– West Virginia Bureau for Medical Services (BMS)
Advanced Planning Document (APD) Assistance (08/2023 to present)
Sarah provides project management support for the APD project, overseeing the development and management of all APDs for WV's single state Medicaid agency, BMS. She maintains the APD tracker and schedule to help ensure federal funding for all aligned state projects.



Electronic Visit Verification (EVV) Solution Implementation Project (11/2019 to 06/2023)

Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues. Sarah helped BMS with the release of their EVV RFP, coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of WV's EVV solution.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2020 to 08/2021)

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

Provider Management Support (PMS) Project (11/2019 to 08/2021)

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

Mountain Health Promise (MHP) Implementation Project Management Support (01/2020 to 06/2020)

Sarah provided project coordination support, deliverable review, and creation support, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.

– Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitations Consulting Services (09/2020 to present)

Sarah helped develop and distribute a fact-finding survey to gain input from interested and invested parties and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Additionally, Sarah assists with the development of deliverables, project presentations, and monitors project action items.

– West Virginia Department of Human Services (DoHS)

Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification Project (01/2021 to present)

Sarah provides documentation and deliverable lead support for the EDS Project. She provides leadership and helps manage a detailed library of deliverables from development to approval, leveraging approved schedules and cycles per service level agreements (SLAs) while also overseeing annual updates to help ensure compliance. As an experienced business analyst, Sarah also monitors the schedule and action items. Sarah works closely with the client and vendors on both internal and client deliverables to maintain and strengthen the project's reporting processes. Sarah helps to provide strategic direction on the best approach for monitoring vendor performance and strengthening vendor relationships.

People's Access to Help (PATH) DDI Project Management (12/2019 to 03/2021)

Sarah provided project coordination, tracked action items, and monitored project risks and issues. Additionally, Sarah assisted the cross-functional team in various project areas, including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.

Mental Health (MH) Parity Compliance Analysis (04/2020 to 08/2020)

Sarah provided project coordination support, monitored project risks and issues, and assisted with



deliverable development of WV's MH Parity Compliance Report. She coordinated meetings with Managed Care Organizations (MCOs) and helped to gather documentation for accuracy related to fee-for-service (FFS) and pharmacy claims.

West Virginia Governor's Highway Safety Program (2013 to 2019)

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

KISRA (2012 to 2018)

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

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

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

The Salvation Army (2001 to 2003)

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



Shelly Schram, CAPM®

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Shelly Schram is a senior consultant in BerryDunn's Medicaid Practice Area with excellent organizational, problem-solving, and analytical skills. She brings over 20 years' experience optimizing productivity, efficiency, and service quality across various environments. Shelly provides business analysis, research, requirements definition, fact-finding, procurement support, and project coordination for state and local agency projects to promote project success.

EDUCATION AND CERTIFICATIONS

BBA, Computer Technology, University of Nebraska at Omaha

Certified Associate in Project Management® (CAPM®), Project Management Institute

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

KEY QUALIFICATIONS

- 20 years of healthcare and non-profit experience
- 10+ years of project management experience
- Six years of Medicaid consulting experience
- Managed major gift (\$10M+) prospects for special projects
- System integration
- Process improvement

PROJECT EXPERIENCE

BerryDunn (01/2019 to present)

– Puerto Rico Medicaid Program (PRMP)

Shelly serves as a subject matter expert (SME) for Puerto Rico's Medicaid Program.

Third Party Liability (TPL) Implementation (12/2024 to present)

Shelly serves as the SME for the TPL project. She focuses on business analysis, project coordination, and management tasks. As a SME, Shelly supports deliverable development, requirements definition and conducts research on federal and state guidance.

Enterprise Data Warehouse (EDW)/Business Intelligence (BI) Project (02/2024 to present)

Shelly serves as a certification SME for the project. She leads the certification process, helping ensure compliance with data governance, security, and regulatory requirements. Shelly collaborates with cross-functional teams, including data architects and business analysis to define certification criteria and help ensure alignment with business objectives.



**- New Jersey Department of Division of Medical Assistance & Health Services (DMAHS)
Provider Management Module (12/2022 to present)**

Shelly is a business analyst and SME on the certification team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the provider module. Her focus is providing specialized knowledge and expertise to the State relating to Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC).

- West Virginia Department of Human Services (DoHS)

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification (06/2021 to present)

Shelly provides federal regulatory and certification subject matter expertise on the project. Her work entails reviewing deliverables, including business/technical design documents and system specifications, for quality, compliance with contractual requirements, and alignment with industry standards and best practices; and identifying issues and providing recommendations for remediation; in support of the State's preparation of CMS SMC.

People's Access to Help (PATH) DDI Project Management (06/2020 to present)

Shelly supports the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DoHS program service systems into a single enterprise. She assists with requirements definition, design (configuration), testing, and the certification and compliance teams.

- West Virginia Bureau for Medical Services (BMS)

Payment Error Rate Measurement (PERM) Project (06/2019 to present)

Shelly serves as a SME for the project. She focuses on identified error life cycles, tracking requests, data analysis, corrective actions, and Corrective Action Plans (CAPs). Shelly also works closely with the Medicaid Eligibility Quality Control (MEQC), developing and maintaining the pilot planning document for the State to identify vulnerable or error-prone areas. In addition, she tracks errors identified in PERM "off-years" through the MEQC review process and helps identify corrective measures and tracks implementation before PERM reviews begin. Shelly has developed many proactive processes to streamline PERM and MEQC tasks to assist the State with tracking errors and case level data entry.

TPL Options Analysis and Procurement Assistance Project (04/2019 to 03/2022)

Shelly served as the project SME for the TPL project. She focused on business analysis, project coordination, and management tasks. As a SME, Shelly supported deliverable development, requirements definition, conducted research on federal and state guidance, and performed gap analysis between the Request for Proposal (RFP) and State-identified requirements.

Enterprise Program Management Office (EPMO) (01/2019 to 10/2021)

Shelly supported the EPMO project with business analysis, project coordination, and management tasks. She worked with the State to maximize productivity and developed State-approved templates used across the engagement. Shelly also worked as a SME for Advance Planning Documents (APDs) in development and updated project narratives and timelines.

CHI Health Foundation (08/2018 to 01/2019)

As the Foundation coordinator, Shelly led the coordination and management of projects, campaigns, and events from inception to successful completion. She analyzed gifts to determine appropriate campaigns, funds, and appeals for each processed gift, as well as processed daily gift batches and produced gift receipts and acknowledgment letters. Additional responsibilities included working with the National Office to research local high-profile donors who align with the Foundation's core values and directing aspects of the fund development database (Raiser's Edge).



Father Flanagan's Boys Home (04/2008 to 08/2018)

– Development Project Specialist (01/2016 to 08/2018)

In this role, Shelly developed, maintained, and monitored detailed project schedules, including timelines, workflow, budgets, personnel, and resources. She researched high-profile donors via online data sources for the executive director and SVP of Development, and coordinated events hosted by National Development. During this time, Shelly also began integration of the Blackbaud Luminate Online system. For this project, she coordinated and took lead on helping to ensure timely completion. In addition to integration, she began the process of building online campaigns with matching appeals.

– Training and Evaluation Data Specialist (05/2013 to 01/2016)

Shelly managed data files to help ensure accuracy and security. She summarized the results of training and evaluation activities; organized and prepared high-quality reports, graphs, and charts of departmental activities; and constructed and maintained staff evaluation and program fidelity instruments.

– Project Support Specialist (12/2011 to 05/2013)

Shelly assisted with the migration of three databases into one newly created CRM, assisting with accurately mapping data fields and migrating 7.3 million donor records. She researched foundations, organizations, and individuals using several online databases to compile into a constituent report.

– Data Analyst (04/2008 to 12/2011)

Shelly evaluated data collected through research, task analysis, business processes, surveys, and workshops. She updated and maintained consumer contact and other data through web-based portals and other databases; updated and maintained lists of materials, contracts, and departmental data in a central location; and utilized online systems to send and track marketing campaigns.



Elizabeth “Liz” Vose, MPA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Liz Vose is a senior consultant in BerryDunn's Medicaid Practice Group presenting with a strong understanding of state government oversight of Medicaid managed care compliance. She has 12 years' experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid initiatives.

EDUCATION AND CERTIFICATIONS

MPA, Finance & Information Management, Rockefeller College of Public Affairs & Policy

BA, French Literature and Language, Skidmore College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

10.5 years

KEY QUALIFICATIONS

- Experience leading large-scale transformation across multiple state agencies
- Drafted managed care requirements New York, Ohio, West Virginia
- Developed managed care organization (MCO) compliance component of Comprehensive Oversight and Monitoring Plan framework for Administración de Seguros de Salud – Puerto Rico
- State experience directing managed care compliance activities
- Designed beneficiary and provider engagement plans to inform managed care changes in Missouri, New York, Ohio, and Federal TRICARE program
- Led managed care procurement and readiness review efforts for multiple states
- Experience translating request for proposal (RFP) requirements into MCO model contract
- Directed behavioral health federal quarterly reporting activities
- Provided oversight and technical assistance to help ensure 1115 federal waiver compliance
- Over 10 years' experience in Medicaid policy, transformation initiatives, compliance, and stakeholder engagement
- State agency management and national consulting perspective on Medicaid managed care transformation and oversight
- Background in transitioning behavioral health services and populations into Medicaid managed care



PROJECT EXPERIENCE

BerryDunn (02/2022 to present)

Liz is a senior consultant with BerryDunn and serves as a program manager for managed care projects. In addition, she provides support to the Office of Procurement Services to streamline purchasing efforts across various procurement projects.

– West Virginia Bureau for Medical Services (BMS)

Programmatic Managed Care Support (06/2024 to present)

Serving as program manager for the Programmatic Managed Care Support project, Liz oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives. Projects include implementation of Senate Bill 820 provisions, aligning WV Dual Special Needs Program with Medicare Part D Final Rule, designing and launching managed care modules for the Medicaid Learning Center, and conducting onboarding activities of a new MCO.

Advanced Planning Document (APD) Assistance (08/2023 to present)

Liz serves as a project liaison for the APD consulting services team as needed. She developed the APD toolkit and assists with client related supports.

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2023 to present)

Liz serves as a Medicaid managed care subject matter expert (SME) for this initiative designed to help ensure access to coordinated, comprehensive behavioral healthcare.

1115 Demonstration Behavioral Health Project (05/2023 to present)

Liz serves as a Medicaid managed care SME for the project designed to evolve the continuum of care for individuals with substance use disorder (SUD) by adding and expanding services under the Section 1115 demonstration to better support Medicaid enrollees with SUD.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (07/2022 to 06/2023; 11/2023 to 06/2024)

Liz served as the Medicaid project manager and managed care SME. Liz managed the project and lead a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

Legislative Implementation Assistance Project (LIAP) (09/2023 to 10/2023)

Liz served as the Medicaid project manager. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

Mountain Health Promise (MHP) Implementation Project Management Support (07/2022 to 09/2023)

Liz served as the Medicaid project manager and managed care SME. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

– West Virginia Department of Human Services (DoHS)

Purchasing Support (03/2024 to present)

Liz serves as a procurement SME in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. She provides support across multiple procurement projects including, Child Welfare Initiatives (CWI) Phase, WV Resource Integration Solutions for Enrollees (WV-RISE) Procurement Assistance Project, Asset and Income Verification



Procurement, and Incident Case Management Support.

Mercer Government Human Services Consulting (04/2019 to 05/2021)

Liz worked as a senior government consultant to assist state governments on a national scale implementing Medicaid programs and stakeholder engagement initiatives. She established Medicaid compliance programs for states that comport with federal regulations, drafted, and presented RFPs to secure funding for future contracts, and developed a platform to assist state governments in tracking and trending compliance issues over time. She worked with finance, policy, clinical and operations teams to offer comprehensive consulting services for state Medicaid agencies, including but not limited to the Ohio Department of Medicaid, Missouri Department of Social Services, New Hampshire Department of Health and Human Services, Puerto Rico Administración de Seguros de Salud, and Delaware Department of Health and Social Services. Liz supported the United States Defense Health Agency in developing a public engagement strategy to inform changes to the federal TRICARE health program.

New York State (NYS) Office of Mental Health (12/2013 to 03/2019)

Pursuant to Article 44 of the Public Health Law (PHL), the NYS Medicaid agency, the Department of Health (SDOH), jointly oversees the Medicaid managed care program with the Commissioners of the Office of Mental Health (OMH) and the Office of Alcoholism and Substance Abuse Services (OASAS), for New York State's Medicaid managed care program. Under this construct, Liz's roles included:

- Acting Deputy Director, Division of Managed Care (10/2018 to 03/2019)

Liz supported the associate commissioner for the Division of Managed Care in overseeing behavioral health managed care operations spanning analytical, policy, stakeholder engagement, and compliance workflows.

- Director of Compliance and Communications (05/2015 to 03/2019)

Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including but not limited to public presentations, road shows, and social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She consulted with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Acting Deputy Director prior to departure.

- Project Manager (12/2013 to 04/2015)

Liz managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked, and risks were communicated to executive staff as well as the Governor's office.

SUNY Albany (09/2011 to 12/2013)

Liz served as a budget analyst to manage Income Fund Reimbursable (IFR) accounts with a net worth of \$9M. She conducted fiscal analyses including running quarterly projections and year-end activity reconciliation for a variety of accounts and funds and worked with account managers to identify and resolve fiscal inconsistencies.

HAVE Inc. (04/2007 to 08/2009)

Liz served as accounts payable manager to process invoices, present payable activity to the CEO, and manage the credit card reconciliation process.

New York & Company (09/2002 to 08/2005)

Liz served as an assistant buyer responsible for the skirts business. She monitored sales activities



against projected on a daily, weekly, quarterly, and annual basis and presented findings to the CEO. She also worked closely with design, sourcing, and marketing to help ensure trend-right silhouettes hit the stores on time and generated targeted revenue.



Megan Blount, MBA

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MBA, University of Charleston

BS, Communications, West Virginia State University

West Virginia Division of Personnel (DOP) Trainer Certification

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

4 years

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

KEY QUALIFICATIONS

- 10+ years of Microsoft Office experience
- 10+ years of customer and client relations
- Five years of Google Workspace experience
- Over four years of project coordination experience
- Business analysis, data analysis, and research
- Training creation and delivery

PROJECT EXPERIENCE

BerryDunn (04/2021 to present)

– West Virginia Bureau for Medical Services (BMS)

IT Control Environment Review (07/2024 to present)

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

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Project (03/2024 to present)

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.

Advanced Planning Document (APD) Assistance (05/2023 to present)

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



Payment Error Rate Measurement (PERM) Project (04/2021 to present)

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

Public Health Emergency (PHE) Support Project (12/2021 to 12/2024)

Megan provided project coordination, deliverable development and review, and tracked action items. Megan was involved with the creation of the Communications Plan and assisted in creating trackers in SharePoint Online for project documents.

System Development Life Cycle (SDLC) Coordination Project (06/2024 to 10/2024)

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

Data Improvement Project (06/2021 to 06/2024)

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

Organizational Development Project (07/2022 to 10/2023)

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

Provider Management Support (PMS) Project (11/2021 to 03/2023)

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

Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 to 02/2023)

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

Third-Party Liability Post-Implementation (01/2022 to 03/2022)

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

Third-Party Liability Options Analysis and Procurement Assistance Project (04/2021 to 06/2021)

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

– West Virginia Department of Human Services (DoHS)

Child Welfare Initiatives Project Management Services Phase III (12/2021 to 02/2022)

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

West Virginia State Tax Department (10/2019 to 04/2021)

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

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

Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as



directed by management, and assisted in documentation management.

West Virginia State University (WVSU) (06/2013 to 10/2018)

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

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

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

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

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

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



Jonathan "Jon" Watkins

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Jon Watkins is a consultant with BerryDunn, presenting with a history of working in high pressure, fast-paced roles that require diligence, precise communication, and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors, building strong relationships and successful project outcomes.

EDUCATION AND CERTIFICATIONS

BS, Criminal Justice, West Virginia University at Parkersburg

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

3 years

KEY QUALIFICATIONS

- Three years' experience supporting a single state Medicaid agency, including experience in procurement, Managed Care Organization (MCO) onboarding, Medicaid Enterprise System (MES) modernization, Home and Community Based Services (HCBS), and risk assessment and management
- More than 10 years' experience with coordination, organization, and management
- Expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership

PROJECT EXPERIENCE

BerryDunn (11/2021 to present)

– West Virginia Department of Human Services (DoHS)

Purchasing Support (11/2024 to present)

Jon provides project coordination and monitors project risks and issues in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Medicaid and Children's Health Insurance Program (WVCHIP)

Enterprise System (MCES) Procurement Assistance Project (11/2021 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MCES Project, working closely with Bureau for Medical Services, WV's single state Medicaid agency. Jon helps to keep the client informed and helps ensure the project meets its goals and objectives.



People's Access to Help (PATH) DDI Project Management (11/2023 to 02/2024)

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

Incident and Case Management System (ICMS) Procurement Project (09/2022 to 06/2023)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of the ICMS procurement. Jon's work helped to ensure the State has a detailed Request for Proposal (RFP) and a successful procurement for ICMS services.

Mental Health Parity and Behavioral Health Support Project (01/2022 to 06/2022)

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

– West Virginia Bureau for Medical Services (BMS)

ARPA Section 9817: HCBS Implementation Project (09/2024 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the ARPA HCBS Implementation Plan Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Programmatic Managed Care Support (06/2024 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the Programmatic Managed Care Support Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (07/2022 to 06/2023; 11/2023 to 08/2024)

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

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (11/2023 to 12/2023)

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

Legislative Implementation Assistance Project (LIAP) (09/2023 to 10/2023)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for BMS and the LIAP Project. Jon helped to keep the client informed and helped ensure the project met its goals and objectives.

Public Health Emergency (PHE) Support Project (12/2021 to 12/2022)

Jon provided project coordination and monitored project risks and issues to assist the State with temporary flexibility that provides services to different beneficiaries during PHE. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

Mountain Health Promise (MHP) Implementation Project Management Support (11/2021 to 11/2022)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of procurement activities for MHP. Jon's work helped to ensure the



State had a detailed RFP and a successful procurement, along with onboarding support for the chosen vendor.

CAMC Hospital (1/2021 to 11/2021)

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

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

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

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

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



Jordan Ramsey, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Jordan Ramsey is a Consulting Services Support Manager in BerryDunn's Government Consulting Group and manager 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 Lean Six Sigma Green Belt, and holds a MA in English: Professional Writing.

EDUCATION AND CERTIFICATIONS

MA, English, Professional Writing, Southeast Missouri State University

BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Lean Six Sigma Green Belt

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

14 years

PROJECT EXPERIENCE

BerryDunn (07/2019 to present)

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

Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content.

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.



Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years



Caitlin Cabral is a Poynter-ACES-certified member of the BerryDunn Editorial/QA (EQA) team who has demonstrated experience in project management, copyediting, and teaching others business writing skills. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

As a member of BerryDunn's EQA team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, reports, and PowerPoint presentations for various projects. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards as outlined in the BerryDunn Style Guide. Caitlin trains new teammates and creates and presents educational materials to the consulting team about various aspects of business writing. She helps to maintain the Style Guide and continuously improve EQA's service offerings.

QualityMetric (08/2020 to 09/2021)

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

University of Hartford Department of Psychology (01/2019 to 05/2020)

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



True Colors, Inc. (01/2019 to 05/2019)

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

University of Hartford Department of Communication (09/2018 to 05/2020)

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



Jonathan “Jon” Williams, MA, LSSGB

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC

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

EDUCATION AND CERTIFICATIONS

BA, English, Bowling Green
State University

Lean Six Sigma Green Belt
(LSSGB)

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

20 years

PROJECT EXPERIENCE

BerryDunn (02/2019 to present)

Jon serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting client deliverables, meeting notes, memos, and PowerPoint presentations for various government entities.

Freelance Proofreader and Copyeditor (11/2010 to present)

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

Midwest Tape (11/2004 to present)

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

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

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

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

Jon proofread catalogs and mailing pieces for this direct-mail



horticulture group. He checked facts, layout, grammar, and spelling, and wrote copy for planting guides included with shipments.



Alycia Minshall, MA

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Alycia Minshall is an editing and communications professional with more than 15 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

EDUCATION AND CERTIFICATIONS

MA, English Language and Literature, Central Michigan University

BA, English, Alma College
Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

16 years

PROJECT EXPERIENCE

BerryDunn (08/2022 to Present)

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

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 to ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (04/2017 to 8/2021)

– Senior Editor (06/2020 to 08/2021)

As senior editor, Alycia wrote copy for various mediums, including websites, social media, 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 and that all materials are well written, accurate, properly researched, objective, and concise. 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; and meeting notes. She helped ensure materials were accurate, objective, concise, and consistent 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 a 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 covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (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 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, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

– **Writing Center Tutor (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.



Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Accounting, University of Southern Maine

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

9 years



Carole Ann Guay is a senior consultant for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator, technical analyst and workflow developer. She has provided support services such as workflow and dataflow diagrams, document requests, status reports, meeting requests, and data management. She has also worked to help ensure business assessments are compliant with federal regulations and provided documentation and deliverable assistance on numerous projects.

PROJECT EXPERIENCE

BerryDunn (10/2014 to present)

– Puerto Rico Medicaid Program

Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)

Carole Ann assists with review and updates of deliverables.

– Maine Department of Corrections (DOC)

Offender Management System (OMS) Consulting Services (11/2021 to present)

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing a Request for Proposal (RFP), and assisting the DOC with its selection of a new OMS.

– Ellis County, TX

Computer-Aided Dispatch/Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 to present)

Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

– Vermont Department of Vermont Health Access

Vermont Health Connect Financial and Programmatic Audit (01/2016 to present)

BerryDunn has performed the State's financial and programmatic audit of its health insurance exchange since 2016. Carole Ann



currently serves as the project coordinator on this audit to determine whether the Exchange is in material compliance with 45 CFR 155.



– **Minnesota Health Benefit Exchange (MNSure)**

Programmatic Audit (10/2015 to present)

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.

– **Monroe County, FL**

Clerk and Court Business Process Review (02/2023 to 02/2024)

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

– **City of St. Charles, MO**

Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

– **Arizona Department of Agriculture (AZDA)**

Assessment of Current Licensing System and Development of a Transition Scope of Work (12/2022 to 07/2023)

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

– **Montana Department of Corrections (MDOC)**

OMS Procurement (01/2023 to 07/2023)

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

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

Information Security Program Development (05/2016 to 04/2021)

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

– **New Mexico Corrections Department (NMCD)**

Commercial Off-the-Shelf (COTS) OMS Replacement (11/2016 to 06/2020)

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition



services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

– **Oregon Enterprise Technology Services (OR ETS)**

Integrated IT Service Management (ITSM) (03/2018 to 03/2019)

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

– **Colorado Office of the State Auditor**

IT Evaluation (09/2017 to 02/2019)

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

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

Information Security Audit (08/2016 to 12/2017)

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

– **West Virginia Department of Human Services**

Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for West Virginia E&E Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

– **Massachusetts State Ethics Commission**

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

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

Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

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



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



KD Dobyne

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC



KD Dobyne is an experienced project coordinator, bringing administrative support and project assistance experience. She brings excellent time management skills and attention to detail that she applies to her project work.

EDUCATION AND CERTIFICATIONS

BA, Linguistics, University of Texas at Arlington

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

3 years

PROJECT EXPERIENCE

BerryDunn (09/2023 to present)

KD serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-government clients. She assists in the compilation of deliverables, creation of visual aids, and project tracking.

Qualtek Wireless (08/2022 to 09/2023)

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

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

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

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

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



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



Megan Hamilton, MA

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



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

EDUCATION AND CERTIFICATIONS

MA, Literary and Cultural Studies, Carnegie Mellon University

BA, English, Kent State University

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

6 years

PROJECT EXPERIENCE

BerryDunn (12/2022 to present)

Megan works with in Consulting Support Services to provide documentation support. Megan reviews and copyedits deliverables and service level agreements for BerryDunn clients.

Fiverr (05/2022 to 12/2022)

Megan served as a freelance editor and proofreader on professional documents for clients.

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

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

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

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

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

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

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

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

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

Megan served as an administrative assistant, directly under Finance



Director, to edit and update pertinent documents for ISO auditing and company records. She created MS Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



Grace Min

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

EDUCATION AND CERTIFICATIONS

BA, English Literature,
summa cum laude, Oral
Roberts University

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELATED EXPERIENCE

8 years

PROJECT EXPERIENCE

BerryDunn (11/2024 to present)

Grace supports the consulting services group, working on the Editorial/Quality Assurance team. Grace reviews, formats and copyedits client deliverables, as well as service level agreements.

Freelance Technical Writer (01/2020 to present)

Grace performs thorough research into subjects requested by clients to write clear and accurate articles, manuals, proposals, standard operating procedures (SOP), and research reports. She collaborates with subject matter experts (SME) and refines information to create clear documentation, cross-checks sources and information to help ensure accuracy, and helps to ensure all content is optimized for SEO purposes.

Contract Copy Editor/Proofreader (06/2017 to present)

Grace reviews and edits a variety of manuscripts including academic articles, books, essays, and informational material. She proofreads and refine material for grammar, syntax, and style; verifies the validity of all content through meticulous fact-checking; and maintains style guide requirements.

Oral Roberts University Graduate School of Theology and Ministry (08/2016 to 05/2017)

As a graduate research assistant, Grace conducted academic research for the dean of the College of Theology and Ministry and professors. She assisted professors with grading and presentations, maintained confidential student records and updated information, and answered student and visitor inquiries.

Oral Roberts University History, Humanities, and Government Department (08/2015 to 05/2016)

Grace assisted professors in grading and attendance, updated computer log of student petitions, and designed and maintained department bulletin boards.



Private SAT Tutor (05/2015 to 08/2015)

Grace developed individualized SAT study plans for the reading, writing and essay sections. She conducted tutoring sessions, administered regular practice tests, and monitored student progress.

ORU Writing Center (08/2015 to 12/2015)

As a writing tutor, Grace provided personalized feedback to students on their essays, focusing on clarity, coherence, grammatical accuracy, and adherence to style guides. She guided students through grammar and writing tutorials, and conducted one-on-one tutoring sessions to address individual writing challenges to enhance overall writing skills.

Oral Roberts University (08/2014 to 05/2015)

As an academic peer advisor, Grace provided individualized tutoring to students for various subjects. She edited student papers and worked with student leadership in dormitories.

Private Dental Practice (2012 to 2016)

As an office assistant, Grace checked in patients, verified insurance information, and processed payments. She also answered phone calls and responded to patient inquiries, scheduled and confirmed patient appointments, and updated patient records.



Cate Poling

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, emphasis in English Literature, Marshall University

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

3.5 years

Cate Poling is a knowledgeable researcher and writer with extensive experience researching and documenting detailed and concise information in the insurance, clinical practice, and project management settings, with a latter focus on documenting, understanding, and articulating compliance needs throughout both systems development and project lifecycles. Cate transitioned from clinical practice work to working with single state Medicaid agencies in support of health and human services projects and initiatives, and her attention to detail allows her to be an invaluable resource for drafting and interpretation of federally-mandated documentation and funding requests, deliverables, Requests for Proposals (RFPs), meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as relates to Medicaid Enterprise system privacy and security architecture and standard security frameworks, such as National Institute of Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Standards for Exchanges (MARS-E). She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Additionally, Cate works to promote quality and inclusivity in language, communication, and the workspace as a Poynter ACES certified editor and co-chair of one of the firm's Employee Resource Groups (ERGs).

KEY QUALIFICATIONS

- Extensive experience with drafting, preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and RFPs
- Over three years of experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

PROJECT EXPERIENCE

BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical West Virginia and Iowa state Medicaid agency projects and initiatives across various



realms, such as project management, project coordination, subject matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the West Virginia Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to West Virginia's needs and deliverables.

– **Iowa Health and Human Services (HHS)**

Eligibility Integration Application Solution (ELIAS) (01/2025 to present)

As the schedule management lead, Cate supports the project team and State throughout the enhancement of its eligibility system change management and System Development Life Cycle (SDLC) processes and procedures.

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

SDLC Coordination (06/2024 to present)

As project manager, Cate supports the transition of the Data Improvement Project (DIP) body of work, working with the technical advisory and change management team subject matter experts (SMEs) to help align SDLC activities across all BMS vendors and data suppliers. Cate facilitates meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate manages the project team working together to support the State's use of an integrated change management tracking tool and to help promote efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes.

DIP Phase IV (06/2023 to 06/2024)

As a project manager, Cate assisted with refining, expanding, and initiating the DIP SDLC body of work and preparing for the transfer of the work to the SDLC Coordination project. She oversaw the successful closure of the project, for which she had oversight responsibilities including organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviewed meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate also assisted with WV engagement hours and resource planning oversight within this role.

– **West Virginia Department of Human Services (DoHS) (06/2021 to present)**

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES)

Procurement Assistance Project (06/2023 to present)

Cate provides subject matter expertise to assist in development and refinement of technical requirements to support the State in defining desired outcomes for MCES module procurement(s), including specifications related to systems privacy and security compliance and technical and organizational processes.

People's Access to Help (PATH) DDI Project Management (06/2021 to present)

As a consultant for the PATH project, Cate has a variety of responsibilities, which include providing project coordination support, researching and developing process flows, following up on action items, assisting with change management processes and procedures, scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).



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

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

Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 to 10/2023)

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

Jackson County Solid Waste Authority (SWA) (09/2024 to present)

As a County-Commission elected appointee, Cate sits on the Jackson County, WV SWA board, established by WV Code §22C-4-3 to help protect public health and welfare by establishing a comprehensive program of solid waste collection, processing, recycling, and disposal. Cate works alongside SWA board members to evaluate key County SWA issues, outreach needs, and project initiatives, including those related to staffing sourcing and maintenance, community engagement, and grant program funding evaluation and application, especially as relates to the County's recycling program management and community waste collection initiatives.

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

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

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

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

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



provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

Wal-Mart Supercenter (08/2014 to 09/2015; 05/2009 to 01/2012)

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

From 2009 to 2012 as a cashier, Cate provided excellent customer service by ringing up purchases, assisting customers in locating/learning about merchandise, processing returns/exchanges, cashing government and payroll checks, and keeping front end clean, well-stocked, and free of hazards. Cate assisted other departments in working freight and coordinated special projects, including a sustainability plan to implement proper recycling procedures.

Highmark WV Blue Cross Blue Shield (BCBS) (10/2012 to 07/2014)

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

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

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

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

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



Kourtney Kirk

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



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

EDUCATION AND CERTIFICATIONS

BS, Business
Administration –
Marketing, Glenville State
University

Medicaid Learning Center
(MLC) Certified Medicaid
Professional (HIT + MCMP
II)

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

3 years

KEY QUALIFICATIONS

- Extensive experience with preparation, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, SOWs, Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Three years expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

PROJECT EXPERIENCE

BerryDunn (10/2022 to present)

Kourtney is a senior consultant with BerryDunn's Medicaid Practice Group. Kourtney provides support to the Bureau for Medical Services, West Virginia's single state Medicaid agency, as well as other State departments and agencies that work closely with Medicaid and Integrated Eligibility Services.

– **West Virginia Department of Health Facilities (DHF)**
Contract Labor Management Services (CLMS) RFP Development
(01/2025 to present)



- West Virginia Department of Human Services (DoHS)

Business Intelligence (BI) and Enterprise Data Solution (EDS) Independent Security Assessment Project (05/2023 to 10/2023; 11/2024 to present)

As the lead coordinating consultant, Kourtney assists with facilitating meetings between Project Management Office (PMO), State, and vendors, and develops and distributes meeting materials. Additionally, she is responsible for creating monthly status reports and project deliverables, tracking action items and decisions, and helps ensure adherence to the project timeline and sensitive documentation and communication needs.

People's Access to Help (PATH) DDI Project Management (10/2022 to present)

Medicaid EDS Implementation and CMS Certification Project (08/2020 to 01/2022; 10/2022 to present)

As a project coordinator and business analyst supporting DoHS, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES)

Procurement Assistance Project (08/2020 to 01/2022)

As a project coordinator for PATH, EDS, and MCES projects, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract SLAs. She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

- West Virginia Bureau for Medical Services (BMS)

Systems Development Life Cycle (SDLC) Coordination Project (06/2024 to present)

Tek Systems (03/2021 to 01/2022)

As a subcontractor through Tek Systems with BerryDunn, Kourtney created agendas and maintained meeting schedules for WV DoHS, IBM® Watson Health, and BerryDunn. She created agendas, maintained meeting schedules, and provided quality control for meeting materials to satisfy contract SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

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

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

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

- Business Development Representative (03/2018 to 11/2018)

Kourtney worked directly with Microsoft as an inside sales account executive for Unified Support



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

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

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

Glenville State College (GSC) (08/2017 to 12/2017)

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



Hailey Holden

STAFF CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Hailey Holden is a leadership-driven professional with more than 10 years of experience creating solution-focused and collaborative partnerships in large volume and high stress situations. She is an excellent communicator with a passion for positive change and brings a variety of skills such as timeline management, schedule deconflicting, client-contractor coordination, personnel and resource management, data and project management, event planning and marketing, recruitment, and process improvement.

EDUCATION AND CERTIFICATIONS

BA, Psychology, Purdue University

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2 years

KEY QUALIFICATIONS

- Over 10 years of experience providing solution-focused coordination
- Over five years of successful development, design, and implementation of business processes, education, and training

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

Hailey is a consultant for BerryDunn's Medicaid Practice Group. Hailey supports a variety of practice group initiatives, including supporting the BerryDunn Medicaid Learning Center, West Virginia Operations Improvement Team, and Medicaid Practice Group Resource Library.

– West Virginia Bureau for Medical Services (BMS)

West Virginia Engagement Coordinator (07/2022 to present)

As the engagement coordinator, Hailey has supported BerryDunn leadership in creating change across the varied projects within the engagement and provided a fresh perspective for improving internal and client processes emphasizing quality and consistency. Hailey has led the engagement in process automation, assisting with the design and implementation and corresponding training for several enterprise applications, to increase ease of access and productivity. She has designed and maintains a variety of trackers, budgets, and data stores for use across the engagement, promoting an organized and efficient approach for enterprise management. Hailey manages and processes staffing requests and service level agreements for the engagement, helping ensure data quality and accurate reporting.

Organizational Development (OD) Project Phase II (06/2024 to present)

Hailey provides subject matter expertise in instructional design and training. She supports the development of onboarding and training eLearning courses for BMS.



Advanced Planning Document (APD) Assistance (05/2023 to present)

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

Partnership Management Support Project (12/2023 to 06/2024)

Hailey assisted with leverage and reuse Initiatives and provided project management support.

Provider Management Support Project (01/2023 to 10/2023)

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

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

Hailey served as an adolescent lead social caseworker IV to provide intensive casework services to families and children. She developed productive working relationships with reluctant clients, establishing positive rapport and creating collaborative partnerships between all involved parties. Hailey successfully identified clients' needs to create and implement solution-focused plans of action to meet and exceed those needs. Additionally, Hailey helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress toward client goals. She conducted research, investigation, and strategic decision-making to help ensure proper reporting, prosecution, and handling of child abuse and neglect reports. Hailey also performed assessments of new cases, referred clients to appropriate resources, and provided accurate updates and testimony in court hearings and mediations. Her efforts resulted in a substantial decrease in repeat infractions. During her tenure, Hailey acted in a supervisory role to members of the casework team, providing feedback, continuous education, and training to other caseworkers.

Lake County Court Appointed Special Advocate (CASA) Program (04/2016 to 04/2021)

Hailey served as a Lake County CASA who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. Hailey played an integral in the development of the organization. She worked alongside program leadership for annual goal setting and tracked the completion of milestones, facilitating the organization's strategic goals. Hailey pioneered creative strategies for the recruitment, training, and management of over 100 community volunteers. Hailey conducted an extensive analysis of program training content and protocols and transformed an outdated in-person training protocol into a tailored and refreshed eLearning program to continue the training of community volunteers during the COVID-19 pandemic. She also initiated the conversion of physical client files and demographic information to a secure web-based data store and case management system, allowing for the compilation of statistical data that best represented the organization. Her contribution allowed for a marked increase of both state and national grant funding for the program. Additionally, Hailey planned and conducted education-focused community outreach events, developed and implemented marketing plans for recruitment, and designed refreshed marketing materials for the program to increase community education and awareness.

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

As a member of the Board of Directors, Hailey provided oversight to help meet the organization's strategic goals, and managed strategies for the recruitment, training, and management of volunteers. She evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people.



Hope Connard, PHR, SHRM-CP

MANAGER

Berry, Dunn, McNeil & Parker, LLC



Hope Connard is a consulting manager with 30 years of strategic Human Resource (HR) leadership experience, supporting a wide range of industries in compliance, operations, organizational transformation, and change management. Hope works closely with clients to align HR strategies with business goals, driving growth and enhancing operational efficiencies. She specializes in cultivating organizational culture and leading initiatives with a focus on coaching and development, helping leaders navigate challenges and achieve sustainable success through tailored guidance and support.

EDUCATION AND CERTIFICATIONS

BA, Human Resource Management, University of Arizona

Professional in Human Resources (PHR)

Society for Human Resource Management – Certified Professional (SHRM-CP)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 year

AFFILIATIONS AND MEMBERSHIPS

- SHRM Member
- Global Organization Network (GION) Member

KEY QUALIFICATIONS

- 30 years' experience strategic HR leadership
- Over 20 years of HR risk management and payroll compliance experience
- 10 years of HR consulting in a Professional Employer's Organization (PEO) environment for a variety of industries

PROJECT EXPERIENCE

BerryDunn (12/2019 to present)

– West Virginia Bureau for Medical Services (BMS)

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Reporting Project (07/2024 to present)

Serving as part of the project leadership team, Hope provides guidance and direction to support the team in the assessment and analysis activities, ensuring successful execution of the SS-A update under MITA.

Organization Development Project (06/2024 to present)

Serving as a subject matter expert (SME) and part of the project leadership team, Hope provides guidance and support in the development of the BMS Onboarding Training Modules and BMS branded Learning Management platform. This project supports the workforce development needs as identified in OD Phase 1, and will result in a more effective and consistent approach to onboarding newly hired employees.



Engagement Support (05/2024 to present)

Hope supports BMS engagements by collaborating with the engagement leadership to help ensure project goals and deadlines are met within West Virginia's single state Medicaid agency. She performs a variety of overflow engagement coordination duties, such as documentation/deliverable reviews and other project management activities.

– **Reset IV**

HR Consulting and Advisory Services (04/2024 to 08/2024)

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project.

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

Organizational and Business Process Redesign (12/2023 to 07/2024)

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project for Hawai'i's single state Medicaid agency, the Department of Human Services.

– **CareOregon**

HR Job Family Review and Consolidation (10/2023 to 01/2024)

Hope served as the project lead in an extensive assessment of the organization's job family structure. Working with the client's HR department, Hope's support encompassed providing expert analysis and crafting strategic recommendations to streamline job roles through consolidation and redesign in alignment with CareOregon's strategic vision to improve operational efficiencies.

Employers' Innovative Network (03/2010 to 12/2019)

Hope served in an executive-level capacity, spearheading corporate and client HR initiatives. Overseeing HR operations, consulting, and outsourcing services, she garnered extensive knowledge across various industries, including union and non-union environments spanning multiple states. Providing guidance to internal and external stakeholders, she offered expertise in employment relations and risk management. She played a pivotal role in developing an online training platform and championed initiatives to create valuable and relevant training content. Collaborating on various projects, she innovatively designed employee benefit programs tailored to meet the needs of both employees and client employers. Additionally, she collaborated with fellow leaders to identify and implement a multi-client Human Resources Information System (HRIS) platform, while maintaining a focus on initiatives aimed at enhancing organizational effectiveness.

NGK Sparkplugs (04/2007 to 03/2010)

In her role as an HR administrator for a global manufacturer, Hope managed recruitment efforts and payroll administration, and drove enhancements in HR processes. She played an active role in employee engagement initiatives and supported training and development programs in West Virginia operations. Engaging with Kaizen groups, she focused on improving organizational effectiveness. Notably, her pivotal involvement in relocating import operations from Detroit to Charleston underscored her ability to liaise effectively between U.S. and Japan operations. Additionally, she conducted meticulous audits and data analysis, and aided in implementing a new inventory platform. Hope's unwavering dedication to continuous improvement, particularly through her engagement with Kaizen programs, epitomized her commitment to operational excellence.

IT Alliance of Appalachian Ohio (04/2003 to 04/2007)

Hope worked as an executive assistant and HR generalist for a non-profit focused on improving IT awareness for the southeastern Ohio region. She managed staff and independent contractors for special events tied to IT initiatives. She was responsible for managing HR and payroll responsibilities and grant management. Special projects Hope led for this initiative included creating and managing a job board for interns and professionals entering the IT profession and



coordinating events for the IT sector.



Shandia Benke, IIBA™ ECBA™

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, History, Columbia College

Entry Certificate in Business Analysis™ (ECBA™), International Institute of Business Analysis (IIBA™)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

7 years



Shandia Benke is a certified consultant with over 14 years of experience successfully supporting and leading projects across a multitude of industries, including financial services, education, and government health programs. Shandia specializes in instructional design, e-learning development, business analysis, process improvement, creative problem-solving, and gap identification. With her strong background in education and training, Shandia delivers solutions and provides valuable expertise, making her a trusted resource among clients.

KEY QUALIFICATIONS

- Over 20 years in education
- Over 14 years of project support across a range of industries
- Over seven years' experience developing and leading training and onboarding
- Over six years' experience working with single state Medicaid agencies
- Over six years of office management
- Over five years of SharePoint document management
- Over four years certification support for Missouri Department of Social Services
- One year experience creating e-learning courses in Articulate products
- One year experience working in a learning management system (LMS)
- Proficient in Camtasia
- Skilled in facilitating meetings, researching, synthesizing data, tracking, and reporting
- Excellent written and verbal communication skills
- Accomplished in all Microsoft Office products

PROJECT EXPERIENCE

BerryDunn (04/2018 to present)

– Iowa Department of Health and Human Services (IA HHS)
Quality Management System (QMS) (01/2025 to present)



Shandia is providing business analysis support and subject matter expertise.

– West Virginia Bureau for Medical Services (BMS)

Engagement Coordination Support (01/2025 to present)

Shandia provides review and tracking support for the engagement's statements of work (SOW).

Organizational Development (OD) Project Phase II (07/2024 to present)

Shandia is leading and executing the creation of four e-learning onboarding and training courses for the client.

Programmatic Managed Care (MC) Support (06/2024 to present)

Shandia completed the design and creation of four e-learning training courses and is providing coordination support for the project.

Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (02/2024 to 06/2024)

Shandia led and executed the design and creation of four e-learning training courses.

– West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) DDI Project Management (05/2023 to 06/2024)

Shandia provided project coordination support and onboarding/training expertise.

– Missouri Department of Social Services

Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement EVV Aggregator Solution RFP Development (01/2021 to 05/2023)

MME PMO Program Integrity (02/2019 to 01/2021)

MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 to 02/2019)

Shandia supported the MME PMO through three implementation projects from start-up to certification and project closure. She not only provided document management, meeting facilitation, analysis, and metrics, but she improved client process and structures, led JAD sessions, and conducted User Acceptance Testing (UAT).

– Internal Projects

Medicaid Learning Center (05/2024 to present)

Shandia is leading and executing the redesign of dozens of Medicaid e-learning courses.

West Virginia Engagement Operations Improvement Team (09/2023 to present)

Shandia co-led the build out of the engagement's internal SharePoint Resource Library.

Editorial/Quality Assurance (EQA) Champions (09/2023 to 09/2024)

Shandia played a key role in modifying and improving EQA processes.

Business Analysis Community of Practice (BACOP)

Shandia is co-leading the practice group and its initiatives.

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

As the membership and special events coordinator, Shandia provided administrative support through document and database management and event planning and coordination.

United Landscape Design (2017)

As an office administrator, Shandia led the design and implementation of organizational and systematic process and structure change within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

Lighthouse Preparatory Academy

– Office Manager (2015 to 2017)

As an office manager, Shandia assisted in establishing systems and structures to help the office and organization run more effectively. In addition, Shandia oversaw daily accounting activities for



the general ledger; assisted in the preparation of the annual budget; helped resolve accounting, payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

– **Teacher (2012 to 2016)**

In her role as an educator at Lighthouse Preparatory Academy, a university-model school, Shandia developed course curriculum, created class lessons, and taught subject matter for classes in literature, language, and logic; English composition; and psychology, among others.

– **Dean (2012 to 2015)**

In her role as a Dean at Lighthouse Preparatory Academy, she developed and provided training and onboarding for all families and teachers — new and existing.



Samuel Kessler

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



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

EDUCATION AND CERTIFICATIONS

BS, Marketing, West
Virginia Wesleyan College

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

4 years

PROJECT EXPERIENCE

BerryDunn (08/2020 to present)

– **West Virginia Department of Human Services (DoHS)**
People's Access to Help (PATH) DDI Project Management (08/2020 to present)

As deliverables lead, Samuel manages contract deliverables from the training, testing, functional, technical, certification, and operations areas. As such, he manages the production of the design, development, and implementation (DDI) and maintenance and operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to help ensure that the documents reflect functionality within the system and works with the vendor and the client to address any gaps.

– **West Virginia Bureau for Medical Services (BMS)**
1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (08/2020 to 12/2022)

Samuel acted as a project coordinator and performed a variety of responsibilities for the project which included organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracked decisions, interfaced with vendors, assisted with the drafting of reports, and supported the project team in a variety of functions.

N3 LLC (05/2018 to 08/2020)

Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account



executives. For IBM, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. After Azure, he drove Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

Target (06/2017 to 01/2018)

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

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

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



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
01	Commissioner Briefing	A monthly status update delivered to the BMS Commissioner.
02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
03	Advance Planning Document	The APD will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CHIP	Children's Health Insurance Program
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare and Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advance Planning Document
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
PM	Project Manager
RAC	Recovery Audit Contractor
RFP	Request for Proposal
SME	Subject Matter Expert
SOW	Scope of Work
SS	Project Management Support Staff
State	West Virginia
TPL	Third-Party Liability
WV	West Virginia

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop S2-22-16
Baltimore, Maryland 21244-1850



December 26, 2024

Cynthia Beane, MSW, LCSW
Commissioner, Bureau for Medical Services
West Virginia Department of Health and Human Resources
350 Capitol Street, Room 251
Charleston, WV 25301

RE: WV-2024-11-04-MMIS-IAPD-TPL

Dear Commissioner Beane:

This letter is in response to West Virginia's submission dated November 4, 2024, requesting that the Centers for Medicare & Medicaid Services (CMS) review and approve the state's Medicaid Management Information System (MMIS) implementation Advance Planning Document (APD) related to procurement of system(s) and related services in support of its Third-Party Liability (TPL) program.

The state's APD seeks a total of \$1,220,160 between Federal Fiscal Years (FFYs) 2025-2027. This funding will allow the state to expand its existing engagement with BerryDunn to include development of a Request for Proposals (RFP) for a successor to its current TPL solution, as well as support to state personnel during source selection, pre-award contract negotiation and vendor/contract transition; the request also includes initial funding for actual TPL activities in the final months of FFY 2027.

The state has identified outcomes for its TPL procurement that align with CMS-specified outcomes for TPL solutions; the state is expected to submit the associated operational metrics at least annually.

CMS approves West Virginia's APD (WV-2024-11-04-MMIS-IAPD-TPL) effective November 4, 2024, in accordance with Section 1903(a)(3) of the Social Security Act, 42 CFR 433, Subpart C, 45 CFR 95, Subpart F, and the State Medicaid Manual, Chapter 11. CMS is authorizing expenditures under this APD in amounts not to exceed those in the below Medicaid Detailed Budget Tables (MDBTs). CMS' Consolidated MDBT includes approved funding for all MMIS planning, implementation, and operational APDs for the listed FFYs. This project's federal funding authorization will expire on September 30, 2027. This is the first approval for the TPL procurement project (i.e., for the listed FFYs); a previous TPL APD covered funding for FFYs 2019-2023.

Please note: CMS is approving this state Medicaid IT project and the associated funding; however, this APD approval does not constitute approval of any Medicaid program policies. Medicaid program policies must be reviewed and approved through the appropriate state plan amendment or waiver processes.

Per regulations at 42 CFR 433.116, FFP is available at 75 percent of expenditures for operating a Medicaid Enterprise System (MES) module or solution approved by CMS, in accordance with CMS' MES certification requirements. The state may claim 75 percent FFP from the first day of the calendar quarter after the date the system meets the initial approval conditions, as established by CMS. This may include a retroactive adjustment of FFP, if necessary, to provide the 75 percent rate beginning on the first day of that calendar quarter. As outlined in the State Medicaid Manual, Section 11255, FFP for the operation of a non-certified MES solution is reimbursed at 50 percent pending system certification and CMS approval of retroactive operational funding.

This project is subject to all the requirements specified in Appendix B, which includes federal regulations and additional information about the state's responsibilities concerning activities described in the APD. The funding and scope of work approved in the APD are subject to these requirements. **Failure to comply with Appendix B's federal requirements and state responsibilities may result in FFP disallowance.** If the state's project deviates from its description in the CMS-approved APD, FFP for project activities could be suspended or disallowed as provided in federal regulations at 45 CFR 95.611(c)(3) and 95.612.

The state must submit monthly status reports for projects under design, development, and implementation (DDI). These reports should measure progress against the approved APD. Status reports must be submitted to your MES State Officer by the last day of each month, continuing through project completion or transition to steady-state operations.

The state must obtain CMS' prior approval for APDs, Requests for Proposals (RFPs), contracts, and contract amendments as specified in regulations at 45 CFR 95.611. Per 45 CFR 95.611(d), CMS has 60 days to review and respond to a state's submission. The state is reminded that funding for each FFY expires on September 30 of the corresponding FFY. **Failure to submit an annual or as-needed APD update in a timely manner may put the state at risk of having a gap in approved FFP.**

An annual APD update may be submitted at any time, but CMS approval is required before the funding expires in the current FFY. Therefore, CMS requests that you submit an annual APD update outlining budget and implementation activities before the end of the current FFY.

Formal submissions of MMIS APDs, RFPs, and contracts should be sent to CMS' dedicated MMIS electronic mailbox: MedicaidMMIS@cms.hhs.gov, with a cover letter addressed to: Dzung Hoang, Director of the Division of HITECH and MMIS.

If you have any questions, please contact your MES State Officer, Terry Lew, at terrence.lew@cms.hhs.gov or (206) 615-2336.

Sincerely,

Eugene S.
Gabriyelov -S

Digitally signed by
Eugene S. Gabriyelov -S
Date: 2024.12.26
11:21:27 -05'00'

Eugene Gabriyelov, Director
Division of State Systems
On behalf of
Dzung Hoang, Director
Division of HITECH and MMIS

Page 3 – Commissioner Beane

CC:

MESClearance@cms.hhs.gov

Nicole Guess, CMS

Appendix A
West Virginia – MMIS – TPL – Medicaid Detailed Budget Table*
 Covers Federal Fiscal Years (FFYs) 2025-2027 (ending September 30, 2027)
 The table represents initial funding for FFYs 2025-2027 for line items 2A/2B

	MMIS CMS Share (90% FFP) DDI	State Share (10%)	MMIS CMS Share (75% FFP) DDI	State Share (25%)	MMIS CMS Share (75% FFP) M&O	State Share (25%)	MMIS ENHANCED FUNDING FFP Total	State Share Total	MMIS ENHANCED FUNDING TOTAL COMPUTABLE
	2A† + 2B†		2A† + 2B†		4A† + 4B†				
FFY 2025	\$120,150	\$13,350	\$0	\$0	\$0	\$0	\$120,150	\$13,350	\$133,500
FFY 2026	\$377,532	\$41,948	\$0	\$0	\$0	\$0	\$377,532	\$41,948	\$419,480
FFY 2027	\$600,462	\$66,718	\$0	\$0	\$0	\$0	\$600,462	\$66,718	\$667,180

	MMIS CMS Share (50% FFP) DDI	State Share (50%)	MMIS CMS Share (50% FFP) M&O	State Share (50%)	MMIS NOT ENHANCED FUNDING FFP Total	State Share Total	MMIS NOT ENHANCED FUNDING TOTAL COMPUTABLE
	2A† + 2B†		5A† + 5B† + 5C†				
FFY 2025	\$0	\$0	\$0	\$0	\$0	\$0	\$0
FFY 2026	\$0	\$0	\$0	\$0	\$0	\$0	\$0
FFY 2027	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	MMIS ENHANCED FUNDING FFP Total	MMIS NOT ENHANCED FUNDING FFP Total	TOTAL FFP	STATE SHARE TOTAL	APD TOTAL COMPUTABLE
FFY 2025	\$120,150	\$0	\$120,150	\$13,350	\$133,500
FFY 2026	\$377,532	\$0	\$377,532	\$41,948	\$419,480
FFY 2027	\$600,462	\$0	\$600,462	\$66,718	\$667,180

*Funding amounts described here are summarized by FFY; however, funding is only approved to be used according to the approval dates described in this letter.

West Virginia – MMIS – Consolidated Detailed Budget Table*

Covers Federal Fiscal Years (FFYs) 2025-2027 (ending September 30, 2027)
The table represents increases to FFYs 2025-2027 for line items 2A/2B

	MMIS CMS Share (90% FFP) DDI	State Share (10%)	MMIS CMS Share (75% FFP) DDI	State Share (25%)	MMIS CMS Share (75% FFP) M&O	State Share (25%)	MMIS ENHANCED FUNDING FFP Total	State Share Total	MMIS ENHANCED FUNDING TOTAL COMPUTABLE
	2A† + 2B†	—	2A† + 2B†	—	4A† + 4B†	—			
FFY 2025	\$50,663,619	\$5,629,291	\$0	\$0	\$42,587,658	\$14,195,886	\$93,251,277	\$19,825,177	\$113,076,454
FFY 2026	\$34,555,194	\$3,839,466	\$0	\$0	\$39,097,476	\$13,032,492	\$73,652,670	\$16,871,958	\$90,524,628
FFY 2027	\$11,842,920	\$1,315,880	\$0	\$0	\$32,600,934	\$10,866,978	\$44,443,854	\$12,182,858	\$56,626,712

	MMIS CMS Share (50% FFP) DDI	State Share (50%)	MMIS CMS Share (50% FFP) M&O	State Share (50%)	MMIS NOT ENHANCED FUNDING FFP Total	State Share Total	MMIS NOT ENHANCED FUNDING TOTAL COMPUTABLE
	2A† + 2B†	—	5A†+5B†+5C†	—			
FFY 2025	\$0	\$0	\$1,920,298	\$1,920,298	\$1,920,298	\$1,920,298	\$3,840,596
FFY 2026	\$0	\$0	\$1,083,600	\$1,083,600	\$1,083,600	\$1,083,600	\$2,167,200
FFY 2027	\$0	\$0	\$33,600	\$33,600	\$33,600	\$33,600	\$67,200

	MMIS ENHANCED FUNDING FFP Total	MMIS NOT ENHANCED FUNDING FFP Total	TOTAL FFP	STATE SHARE TOTAL	APD TOTAL COMPUTABLE
FFY 2025	\$93,251,277	\$1,920,298	\$95,171,575	\$21,745,475	\$116,917,050
FFY 2026	\$73,652,670	\$1,083,600	\$74,736,270	\$17,955,558	\$92,691,828
FFY 2027	\$44,443,854	\$33,600	\$44,477,454	\$12,216,458	\$56,693,912

*Consolidated funding amounts described above are summarized by FFY; funding is only approved to be used according to approval dates described in this letter.

†MBES Line Item	
2A	MMIS- Design, Development, or Installation of MMIS: Cost of In-house Activities

2B	MMIS- Design, Development, or Installation of MMIS: Cost of Private Contractors
4A	MMIS- Operations of MMIS: Cost of In-house Activities
4B	MMIS- Operations of MMIS: Cost of Private Contractors
5A	MMIS- Mechanized Systems, not approved under MMIS procedures: Cost of In-house Activities
5B	MMIS- Mechanized Systems, not approved under MMIS procedures: Cost of Private Contractors
5C	MMIS- Mechanized Systems, not approved under MMIS procedures: Cost of Interagency Activities

FFP rates for specific activities and costs can be found at 76 FR 21949, available at <https://federalregister.gov/a/2011-9340>

Appendix B

This APD project is subject to the federal regulations and state responsibilities as follows:

- 42 CFR 433, Subpart C, “Mechanized Claims Processing and Information Retrieval Systems”
- 45 CFR 75, “Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards”; and Subpart D, “Procurement Standards.”
- 45 CFR 95, Subpart F, “Automatic Data Processing Equipment and Services—Conditions for Federal Financial Participation (FFP)”
- 42 CFR 457.230, “FFP for State ADP expenditures”
- State Medicaid Manual (SMM), Chapter 11
- SMD Letter #16-004 Re: Mechanized Claims Processing and Information Retrieval Systems-Enhanced Funding, and SMD Letter #16-009 Re: Mechanized Claims Processing and Information Retrieval Systems-APD Requirements, which contain additional details on specific FFP rates for qualifying activities
- SMD Letter #22-001 Re: Updated Medicaid Information Technology Systems Guidance: Streamlined Modular Certification for Medicaid Enterprise Systems

Approved Funding

The amounts allocated per Federal Fiscal Year in the above MDBT(s) cannot be reallocated between FFYs, even within the period of this letter’s approval, without submission and approval of an APD update. Only actual costs incurred are reimbursable.

Systems Software

All software development receiving 90 percent FFP must be state-owned and in the public domain in accordance with 42 CFR 433.112(b)(5) and (6) and 45 CFR 95.617. Federal regulations under 45 CFR 95.617(c) specify that 90 or 75 percent FFP is available for the license for proprietary software, but no FFP is available for the development of that software.

Per 45 CFR 95.617, the Department reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use and to authorize others to use for Federal Government purposes, such software, modifications, and documentation.

Data Safeguarding and Data Breach Reporting

The state’s MES projects and operations are subject to federal regulations at 42 CFR Part 431, subpart F, “Safeguarding Information on Applicants and Beneficiaries,” and the Administrative Simplification provisions under the Health Insurance Portability and Accountability Act (HIPAA) requirements as specified in 45 CFR Part 160 and Part 164. Further, the state is bound by the requirements in section 1902(a)(7) of the Social Security Act, which requires states to provide safeguards that restrict the use or disclosure of information concerning applicants and beneficiaries for purposes directly connected with the administration of the Medicaid program.

In the event of a data breach, the state must immediately report the incident to the CMS IT Service Desk by email at cms_it_service_desk@cms.hhs.gov, or by calling the 24/7 CMS Service Desk phone number: 1-800-562-1963.

Transformed Medicaid Statistical Information System (T-MSIS) Compliance

Timely, accurate, and complete T-MSIS data submission continues to be a CMS priority and is even more critical to national analyses of Medicaid and CHIP services, activities, and expenditures. To comply with T-MSIS Data Quality Assessment criteria, CMS requests that States continue to submit monthly T-MSIS data and continue, as much as possible, to work towards the recommended timelines for resolving T-MSIS data quality (DQ) issues. CMS will continue to measure and report on T-MSIS DQ issues and provide ongoing technical assistance to states.

As of the October 2024 T-MSIS reporting period, West Virginia is compliant with T-MSIS data submission currency and Data Quality requirements. Specifically, West Virginia is current on T-MSIS data submissions and has met the targets for Outcomes Based Assessment (OBA) criteria in critical priority Data Quality checks, high priority Data Quality checks, and the expenditure data content category.

If you need access to the T-MSIS State Support Site, please contact the CMS T-MSIS Help Desk at T-MSIS_Helpdesk@cms.hhs.gov. CMS expects the state to consider and incorporate T-MSIS requirements in every phase of the Software Development Life Cycle (SDLC) as applicable for any changes to state systems that impact T-MSIS data reporting.

Appendix C – Approved Outcomes and Metrics

Reference #	CMS Required Outcomes	Metric (s)
TPL1 Application	<p>The system does the following:</p> <ul style="list-style-type: none"> - Records third parties, - Determines the liability of third parties, - Avoids payment of third-party claims, - Recovers reimbursement from third parties after Medicaid claims payment, and - Records information and actions related to the plan. 	<ul style="list-style-type: none"> - Percentage of Medicaid beneficiaries with stored potential third party liability information. - Number of records of third-party liability reimbursements. - Amount of recovered dollars from reimbursements.
TPL2 Health Insurance Information	The system records other health insurance information at the time of application or renewal for Medicaid eligibility that would be useful in identifying legally liable third-party resources.	- Percentage of beneficiaries with TPL information.
TPL3 Information to Determine Legal Liability	<p>The system uses electronic exchange state wage information collection agency.</p> <p>The system(s) regularly updates the member file with any third-party liability information, how long it is valid, and for what services, through regular automated checks with these databases.</p>	- Cadence of updates to member files with TPL information by database.
TPL4 Rejection Based on TPL	The system rejects and returns to the provider for a determination of the amount of liability for all claims for which the probable existence of third-party liability is established at the time the claim is filed.	<ul style="list-style-type: none"> - Percentage of claims rejected with a code for failure to file with a private insurer or other liable party. - Timeliness of claims rejection and return to provider.
TPL5 Pay and Chase Identification	For claims identified with a third-party liability and designated as 'mandatory pay and chase,' the system makes appropriate payments and identifies such claims for future recovery. (Examples include preventive pediatric services provided to children, or medical child support from an absent parent.)	<ul style="list-style-type: none"> - Percentage of claims identified as pay and chase. - Percentage of recovered reimbursement for pay and chase claims.
TPL6 Pay and Chase Timeline	The system(s) supports providing up to 100 days to pay claims related to medical support enforcement, preventive pediatric services, labor and delivery, and postpartum care that are subject to 'pay and chase.' If a state cannot differentiate the costs for prenatal services from labor and delivery on the claim, it will have to cost avoid the entire claim.	<ul style="list-style-type: none"> - Percentage of pay and chase claims paid within 100 days. - Percentage of pay and chase claims paid to incorrect entity. - Percentage of pay and chase claims paid in the wrong amount.
TPL7 Claims Identification for TPL	The system identifies paid claims that contain diagnosis codes indicative of trauma, injury, poisoning, and other consequences of external causes on a routine and timely basis for the purposes of determining legal liability of third parties.	<ul style="list-style-type: none"> - Frequency of claims being flagged as needing third party liability confirmation. - Percentage of claims identified during cross-checks.

Reference #	CMS Required Outcomes	Metric (s)
TPL8 Probable TPL Determination Timeline	The system identifies probable TPL within 60 days after the end of the month in which payment has been made (unless there is an approved waiver to not recoup funds).	<ul style="list-style-type: none"> - Timeframes for TPL identification. - Timeframes for reimbursement recovery. - Timeframes for reconciliation of questions.
TPL9 Report Generation	The system can generate reports on data exchanges and trauma codes so that the state can evaluate its TPL identification process.	<ul style="list-style-type: none"> - Frequency of report generation. - Frequency of monitoring of data exchanges and other oversight processes.
TPL10 Cost Effectiveness	The system enables the agency to seek reimbursement from a liable third party on all claims for which it is cost effective.	<ul style="list-style-type: none"> - Percentage of claims recovered above the ROI threshold. ROI of claims recovered by contractors. - Percentage of claims not recovered due to ROI threshold.
TPL11 MCO TPL Recovery	As determined by the state policies, system(s) enables the state to manage and oversee TPL recoveries made by its MCOs.	<ul style="list-style-type: none"> - Number of dollars recovered due to MCO TPL recovery. - Percentage of recovered reimbursement attributed to MCOs. - Response time for MCOs to respond to SME regarding TPL recovery.
TPL12 Privacy and Security	Before requesting information from or releasing information to other agencies to identify legally liable third-party resources, state must execute data exchange agreements with those agencies.	<ul style="list-style-type: none"> - Periodic risk analysis of these connections or exchange protocols between the data sharing parties.
TPL13 Reimbursement Tracking	The system tracks TPL reimbursements received so that the state can reimburse the federal government in accordance with the state's FMAP.	<ul style="list-style-type: none"> - Expected vs Actual TPL reimbursement

Reference #	State Specific Outcomes	Metric (s)
	N/A	



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

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

Date: June 3, 2025

To: Office Shared Administration/Finance

From: Jimmy Dowden, WVPBC
Director
BMS, Procurement Services

Re: PF1712347, CDO BMS25*41
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for Month 1-11 in SFY26 and Month 12-13 in SFY27, per the table below:

CDO BMS25*41
Third-Party Liability (TPL)
and Recovery Audit
Contractor (RAC)
Reprocurement
Assistance Project Phase
II

06/15/2025-04/30/2026

PRO5-2026
Lead Project Manager
hours @ \$215
Engagement Manager
hours @ \$270

Lead MMIS Project
Manager 20 hours @
\$205

General Project
Manager hours @ \$190

Project Management
Support Staff hours @
\$80

Payment
\$35,475.00
\$5,940.00

\$4,510.00

\$196,460.00

\$80,080.00

\$322,465.00

05/01/2026-06/14/2026

PRO7 - 2027
Lead Project Manager
hours @ \$215
Engagement Manager
hours @ \$270

Lead MMIS Project
Manager 4 hours @ \$205

General Project
Manager hours @ \$190

Project Management
Support Staff hours @
\$80

Payment
\$6,450.00
\$1,080.00

\$820.00

\$35,720.00

\$14,560.00

\$58,630.00

Grand Total:

\$381,095.00

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4286 or jimmy.k.dowden@wv.gov. Thank you for your time and consideration in the matter.





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

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

DATE: June 3, 2025

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

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

RE: PF1712347, CDO BMS25*41
Dept 0511

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

These services are to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Assistance Project Phase II. The service period 06/15/2025-06/14/2026. The total estimated cost is \$381,095.00.

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



Subject: Governor's Office Approval of contracts over \$100,000



Rosen, Bryan D <bryan.d.rosen@wv.gov>
to Wagner, Roberta A, Price, Robert L

Thu, Jan 23,

I spoke with Curtis early today. He relayed the following information for how we will process these through his office.

1. He would like a synopsis of the purchase. I would suggest in most cases we can pull the extended description populate that in the email to him.
2. Please note if there is a specific timeframe in the request.
3. Contracts will be reviewed at the Master Agreement level meaning that he will not be approving DOs.
4. Renewals for contracts over \$100,000 must be approved.

This process is going to be fluid and will likely morph as we move forward but this is the best information that I have today.

Bryan

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e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

x

Entity

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Location

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Status

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☐ Inactive

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Entity Information ^



All Entity Information

Entities

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Business and Licensing

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Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

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

Addresses	
Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

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

DBA			
DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	

DBA Name	Description	Effective Date	Termination Date
Annual Reports			
Filed For			
2025			
2024			
2023			
2022			
2021			
2020			
2019			
2018			
2017			
2016			
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2013			
2012			
2011			
2010			
2009			
Date filed			

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

Wednesday, June 11, 2025 — 8:07 AM

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