State of West Virginia
Delivery Order

Order Date: 06-06-2025

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 BMS2500000054 1	**Change Order No:**	**Procurement Folder:**	1714135
Document Name:	Medicaid EDS Project Management Support Ph VI		**Reason for Modification:**	
Document Description:	Medicaid EDS Project Management Support Ph VI			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way		**Master Agreement Number:**	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR

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

PORTLAND ME 04102
US

Vendor Contact Phone: 6813138905 **Extension:**

Discount Details:

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

DEPARTMENT CONTACT

Requestor Name: Kelly (Jimmy) Dowden
Requestor Phone: (304) 356-4861
Requestor Email: jimmy.k.dowden@wv.gov

2025
FILE LOCATION _____

INVOICE TO

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

BUREAU FOR MEDICAL SERVICES

350 CAPITOL ST, RM 251

CHARLESTON WV 25301-3709

US

SHIP TO

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

BUREAU FOR MEDICAL SERVICES

350 CAPITOL ST, RM 251

CHARLESTON WV 25301-3709

US

Total Order Amount:	$383,800.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION
DATE:
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE:
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Medicaid Enterprise Data Solution Project Management Support Services Phase VI

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

Total: $383,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$11,180.00
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

52 hours @ $215=$11,180.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$9,720.00
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

36 hours @ $270=$9,720.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$10,250.00
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

50 hours @ $205=$10,250.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		$0.0000	$313,690.00
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

1,651 hours @ $190=$313,690.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		$0.0000	$38,960.00
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

487 hours @ $80=$38,960.00

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Berry, Dunn, McNeil & Parker, LLC

May 27, 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 by providing support for the Enterprise Data Solution Phase VI Project under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 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:

Peter Alfrey

2DAAA44ADB3A477...

Peter Alfrey
Principal
Berry, Dunn, McNeil & Parker, LLC
207-541-2242

Ok

Althea Greenhowe

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West Virginia Department of Human Services, Bureau for Medical Services

Medicaid Enterprise Data Solution Project Management Support Services Phase VI

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21*03

WEST VIRGINIA DEPARTMENT OF
HUMAN SERVICES

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
nbecnel@berrydunn.com

Peter Alfrey, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
palfrey@berrydunn.com

Submitted On:
May 27, 2025

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Staffing Plan and Scope of Work for the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS) Medicaid Enterprise Data Solution Project Management Support Services Phase VI (EDS Project Phase VI)

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) to continue project management (PM) support of the WV Medicaid Enterprise Data Solution (EDS). This work includes support for the implementation of new data sources, testing, security monitoring, vendor deliverable management, and vendor and contract management. The work completed under EDS Project Phase VI 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 BerryDunn and 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

The objective of this project is to provide PM support services for the execution and control of EDS solution activities. This SOW will support the following activities:

- Continue PM support services

- Provide implementation support of the Centers for Medicare & Medicaid Services (CMS) CMS-mandated Acceptable Risk Controls for the Affordable Care Act (ACA), Medicaid, and Provider Entities (ARC-AMPE) security framework V 1.0.1

- Continue supporting the State with the implementation of new data sources, testing activities, security monitoring, vendor deliverable management, vendor and contract management, and Advance Planning Document (APD) support

- Supporting updates to project and system security requirements

In Phase IV of the EDS Project, BerryDunn supported vendor-completed activities during the implementation/cutover from the existing solution to the new solution at go-live, including the three-month parallel testing of the legacy and EDS solutions. BerryDunn also continued providing support to the State during the federal review process to obtain formal CMS certification of the EDS solution. Phase V of the EDS Project included PM support for activities throughout the EDS Cloud migration.

The EDS Project Phase VI will also help the State meet its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Increasing use of evidence-base clinical and appropriate services, including preventive services.

- Standardizing processes for data validation and reconciliation.

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- Improving data access, analysis, and reporting to support decision-making.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Brandon Lewis, Director of Office of Enterprise Systems, as the BMS Project Sponsor and Doug Sorvig, EDS Program Manager, as the BMS Project Lead.

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

- The BerryDunn leadership team will consist of Nicole Becnel, Engagement Manager; Ed Daranyi, Lead Project Manager; Emily McCoy, Portfolio Manager; Sarah Vintorini, Project Manager; and Kourtney Kirk, Deputy Project Manager.

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

- State staff and relevant stakeholders will make themselves available for pertinent EDS project activities. If these individuals or others are not available or do not participate in the sessions, the project schedule, scope, and cost might be impacted.

- If BMS requests assistance developing and/or maintaining documents outside of those outlined within this SOW, those documents will be subject to review and approval by the project sponsor(s) and BerryDunn.

- Deliverables will be provided in an agreed-upon format and stored in an agreed-upon location.

- Vendor-owned deliverables will be provided in an agreed-upon format and stored in an agreed-upon location.

- The level of effort defined within this SOW might be impacted by any delays and/or project issues that arise as a result of vendor performance.

- BerryDunn and the State will explore strengthening WV partnerships with states and other territories, leveraging any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize the EDS Operational APD Update (OAPD-U) for this SOW. CMS previously approved the EDS OAPD-U on August 9, 2024, for total state and federal funds in the amount of $38,527,050, under project identifier WV-2024-06-24-MMIS-OAPDU-EDS. The estimated cost of the services delivered under this SOW is $383,800 (included in the approved APD). Therefore, any additional scope added to the services provided under this SOW might require the State to update its EDS OAPD-U to allocate additional funds for project management.

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2.0 Project Scope and Staffing Plan

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

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

Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
1.0	**Engagement Oversight** *Service Approach* BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will 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 oversee BerryDunn staff, services, and deliverable review. *Deliverable* • D01: Commissioner Briefing *Completion Criteria* 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.	Nicole Becnel Eduardo Daranyi Peter Alfrey Emily McCoy Dawn Webb Sarah Vintorini Kourtney Kirk	176
2.0	**Project Execution and Control** *Service Approach* 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: • BerryDunn will assist the State in facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings • BerryDunn will assist the State in preparing monthly project status updates, risks, issues, and briefings for the State leadership team • BerryDunn will assist the State in	Peter Alfrey Emily McCoy Dawn Webb Sarah Vintorini Kourtney Kirk Dorothy Ball AnnaBella Hyre Alycia Minshall Caitlin Cabral Carole Ann Guay Jonathan Williams	500

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Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	managing project logs (action item, decision, issue, and risk tracking) • BerryDunn will assist the State in storing project documentation repository in an agreed-upon SharePoint location • BerryDunn will facilitate a Project Closeout Meeting prior to the end of the project. • BerryDunn will report the project closeout activities in the final MSR. *Deliverable(s)* • D02: Monthly Status Report *Completion Criteria* 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.	Jordan Ramsey Megan Hamilton KD Dobyne Grace Min Hope Connard Samuel Kessler Hailey Holden Shandia Benke	
3.0	**Federal Reporting Support** *Service Approach* BerryDunn will deliver project management support for federal reporting activities related to new data feeds and/or system enhancements. This includes assisting the State with reviewing federal reports and the Plan of Action and Milestones (POA&M) tracker, as well as providing support in responding to CMS feedback as needed. *Completion Criteria* All parties will deem Federal Reporting Support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sarah Vintorini Kourtney Kirk Ed Crawford Cate Poling Shelly Schram Julie DuPuis AnnaBella Hyre	250
4.0	**Testing Support** *Service Approach* BerryDunn will provide resources to assist the State in testing outstanding defects, systems enhancements, and/or new data feeds. Testing support includes the following activities: • BerryDunn will assist the State with testing activities resulting from the implementation of additional data sources into the EDS, including: o Up to 6 additional data sources as requested by the State in the future,	Sarah Vintorini Kourtney Kirk Julie DuPuis Ed Crawford Jeffrey Stoddard Cate Poling Robert Morey	500

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Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	which could include the following: • Mountain State Assessment of Trends in Community Health (MATCH) • Utilization Management • West Virginia Health Information Network (WVHIN) • Medicare • Master Data Management (MDM) • BerryDunn will help ensure project requirements represent the agreed-upon solution between the State and vendor via the Requirements Traceability Matrix (RTM). • BerryDunn will help identify additional requirements as driven by change requests (CRs), defect remediation, and enhancement activities. *Completion Criteria* All parties will deem Testing Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Julie DuPuis Tom Hunter AnnaBella Hyre	
5.0	**Security Monitoring and ARC-AMPE Implementation** *Service Approach* • BerryDunn will support the State with the implementation of the CMS-mandated AMPE security framework V 1.0.1. *ARC-AMPE Implementation activities include:* • Assessing EDS security requirements to verify alignment with ARC-AMPE controls • Reviewing State-specific tailoring of ARC-AMPE requirements in alignment with existing State policies and processes • Assessing compliance with new ARC-AMPE mandatory supplemental requirements *Supporting updates to project and system security requirements, including the following:* • Supporting updates to the System Security and Privacy Plan (SSPP) to reflect System Security and Privacy Plan for ACA Administering Entities	Sarah Vintorini Kourtney Kirk Ed Crawford Jeffrey Stoddard Cate Poling Shelly Schram Robert Morey Tom Hunter AnnaBella Hyre	400

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Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	Volume II template • Reviewing and assessing POA&Ms and Risk Acceptance Forms (RAFs) *Completion Criteria* All parties will deem Security Monitoring and ARC-AMPE implementation complete upon the completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
6.0	**Vendor Deliverable Management** *Service Approach* BerryDunn will utilize its standardized approach to monitor and provide management oversight for the quality of project deliverables, artifacts, and other vendor-submitted work products related to system enhancements and new data feeds. Our approach will consist of the following elements: • BerryDunn will participate in vendor-facilitated formal reviews of contract deliverables. • BerryDunn will review vendor-owned contract deliverables for alignment with acceptance criteria, contract requirements, and CRs. *Completion Criteria* All parties will deem Vendor Deliverable Management complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sarah Vintorini Kourtney Kirk	150
7.0	**Reprocurement Support Services** *Service Approach* BerryDunn will provide the following reprocurement support services, as requested: • BerryDunn will review the current vendor's contract and/or supporting system documentation and validate with federal requirements to help ensure the most up-to-date requirements are included in the new Request for Proposals (RFP). • BerryDunn will provide subject matter expertise (SME) support for state and federal regulation and state procurement requirements. *Completion Criteria* All parties will deem Reprocurement Support Services complete upon completion of the project closeout	Emily McCoy Dawn Webb Sarah Vintorini Kourtney Kirk Tom Hunter AnnaBella Hyre	200

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Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	meeting and acceptance of the final MSR by the project sponsor or their designee.		
8.0	**APD Support** *Service Approach* 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. *Deliverable* • D03: OAPD-U and Planning Advance Planning Document (PAPD) *Completion Criteria* All parties will deem APD Support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sarah Vintorini Kourtney Kirk Tom Hunter AnnaBella Hyre	100
Total Hours			2,276
Total Not-to-Exceed Cost Estimate			$383,800

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3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 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	36	$9,720
14	LPM	$215	Eduardo Daranyi	52	$11,180
16	LMPM	$205	Emily McCoy	50	$10,250
17	GPM	$190	Peter Alfrey	39	$7,410
17	GPM	$190	Sarah Vintorini	390	$74,100
17	GPM	$190	Kourtney Kirk	559	$106,210
17	GPM	$190	Dawn Webb	65	$12,350
17	GPM	$190	Julie DuPuis	130	$24,700
17	GPM	$190	Shelly Schram	65	$12,350
17	GPM	$190	Dorothy Ball	26	$4,940
17	GPM	$190	Ed Crawford	130	$24,700
17	GPM	$190	Cate Poling	130	$24,700
17	GPM	$190	Robert Morrey	65	$12,350
17	GPM	$190	Jeff Stoddard	26	$4,940
17	GPM	$190	Tom Hunter	26	$4,940
18	SS	$80	Hope Connard	26	$2,080
18	SS	$80	Samuel Kessler	26	$2,080
18	SS	$80	Hailey Holden	65	$5,200
18	SS	$80	Shandia Benke	26	$2,080
18	SS	$80	AnnaBella Hyre	136	$10,880

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CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
18	SS	$80	Alycia Minshall	26	$2,080
18	SS	$80	Caitlin Cabral	26	$2,080
18	SS	$80	Carole Ann Guay	26	$2,080
18	SS	$80	Jonathan Williams	26	$2,080
18	SS	$80	Jordan Ramsey	26	$2,080
18	SS	$80	Megan Hamilton	26	$2,080
18	SS	$80	KD Dobyne	26	$2,080
18	SS	$80	Grace Min	26	$2,080
Total				2,276	$383,800

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4.0 Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	3	4	3	127	38	175	$29,455
Month 2	3	4	4	127	38	176	$29,660
Month 3	3	4	4	127	38	176	$29,660
Month 4	3	4	4	127	38	176	$29,660
Month 5	3	4	4	127	37	175	$29,580
Month 6	3	4	4	127	37	175	$29,580
Month 7	2	4	4	127	37	174	$29,310
Month 8	3	4	4	127	37	175	$29,580
Month 9	3	4	4	127	37	175	$29,580
Month 10	2	4	4	127	37	174	$29,310
Month 11	3	4	4	127	37	175	$29,580
Month 12	3	4	4	127	38	176	$29,660
Month 13	2	4	3	127	38	174	$29,185
Total	**36**	**52**	**50**	**1,651**	**487**	**2.276**	**$383,800**

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5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline
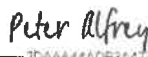
Task	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 Federal Reporting Support													
4.0 Testing Support													
5.0 Security Monitoring and ARC-AMPE Implementation													
6.0 Vendor Deliverable Management													
7.0 Reprocurement Support Services													
8.0 APD Support													

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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	5/27/2025
Signature	Date

Department of Human Services Approval of Approach, Staffing, and Not-to-Exceed Cost

[signature]	6/4/25
Signature	Date

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Appendix A: Resumes

Nicole Becnel, PMP®, ECCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

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

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

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- 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 (WVV) 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)*

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- *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 DoHs'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.

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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

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

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.

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– 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 frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

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

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

PRESENTATIONS

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

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

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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 of his engagements, helping to ensure clients benefit from the breadth of deep expertise BerryDunn has to provide.

EDUCATION AND CERTIFICATIONS

M.Ed., Education, Lesley College

BS, Physics, Mathematics, Business Administration, Hillsdale College

Certified Project Management Professional® (PMP®)

PROPOSED PROJECT ROLE

Lead 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.

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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 has the opportunity to test innovative policy and delivery approaches to reform systems of care for

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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)

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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)*
- *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)*

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- *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

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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

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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)
- *People and processes: Planning health and human services IT systems modernization to improve outcomes,* 11/23/2020 Blog
- Published Insights on 6 include but are not limited to: *NAMD 2020 reflections: Together towards the future and MESC 2020, 2021, 2022, and 2023 reflections.*

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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 MMIS 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

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- 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)*

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- *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)

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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.0, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)
- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements
- Participating in the development and review of the MMIS RFP
- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS
- Oversight and management of the Adult Medicaid Quality Grant
- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

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)

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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.

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

PRINCIPAL
Berry, Dunn, McNeil & Parker, LLC

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.

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

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.

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– 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)

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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

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(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 Bairey 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 (NESCSO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024

- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCSO 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

- 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*

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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.

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Sarah Vintorini

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

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.

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

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.

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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

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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.

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EDUCATION AND CERTIFICATIONS

BS, Business Administration – Marketing, Glenville State University

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3 years

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.

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)

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– 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 and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of 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 and 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 and 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

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

Total Quality Logistics (11/2018 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.

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

MANAGER
Berry, Dunn, McNeil & Parker, LLC

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.

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

General Project Manager

MEDICAID EXPERIENCE

21 years

PROJECT EXPERIENCE

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

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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)

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- 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

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

Unisys (06/2004 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.

Garrnet 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

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Julie DuPuis, MPA

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Julie is a State Medicaid Program subject matter expert (SME) with 30 years of state government experience, working on programs providing comprehensive health coverage to a broad range of individuals, leading and executing Medicaid and related programs, and improving various reporting processes through system initiatives and quality data monitoring. She has a strong foundation in managed care health delivery systems, including encounter data submissions, data quality and improvement initiatives, rate setting, program integrity controls, and automated systems development.

EDUCATION AND CERTIFICATIONS

MPA, Health Care Administration, Western Michigan University

BA, General University Studies, Western Michigan University

Fundamentals in Project Management

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

13 years

KEY QUALIFICATIONS

- Former state employee with over 30 years' experience in state government
- Over 25 years of Medicaid program knowledge, including policy, financing, and delivery including waiver and state plan process
- Strong foundation in managed care health delivery systems
- Adept at migrating Medicaid Management Information Systems (MMIS) from legacy to an enterprise environment
- Experience in health plan rate setting, encounter data collection and quality, and financial analysis
- Led projects with multifaceted teams of statisticians in describing data interpretation and presenting key findings to various audiences

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

– **West Virginia Bureau for Medical Services (BMS)**
Take Me Home (TMH) Home and Community-Based Services (HCBS) Quality Initiative Project (08/2024 to present)
Julie serves as a project manager supporting the creation of a Quality Management Plan required by Centers for Medicare & Medicaid Services (CMS) Money Follow the Person (MFP) and HCBS Long Term Services and Supports (LTSS) mandatory requirements.

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Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (03/2024 to present)
Julie serves as a SME supporting the program through supporting the Department with policy research, development, quality, reporting, and curriculum development.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2024 to present)
Julie serves as a SME supporting the program with the planning activities for an MES modernization procurement.

– West Virginia Department of Human Services (DoHS)
Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (05/2024 to present)
Julie serves the MCES project as a SME supporting requirements gathering and research support.

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (07/2022 to present)
Julie serves the EDS project as a SME supporting data profiling, testing, and requirements gathering.

Incident and Case Management System (ICMS) Procurement Assistance (07/2022 to 04/2024)
Julie served the ICMS project as a SME supporting requirements gathering and research support.

– Minnesota Department of Human Services, Managed Care Contracting and Rates Division
Program Analysis of Implementation of a Program of All-Inclusive Care for the Elderly (PACE) Program (10/2023 to 06/2024)
Julie served as a SME by assisting with actuarial findings, researching PACE programs in other states, and supporting the analysis team.

Michigan State University (MSU), College of Human Medicine, Institute for Health Policy (IHP) (12/2016 to 07/2022)
Julie served as a data resource analyst and Medicaid specialist for MSU where she supported Michigan's single state Medicaid agency, the Department of Health and Human Services (DHHS). Julie helped ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid-affiliated health programs, from start to finish. This position supported Michigan DHHS programs, university researchers, and other community stakeholders. Julie cultivated collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted State staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan DHHS Health Services Data warehouse. She was helpful in formulating responses to CMS questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, developed proposals/manuscripts with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.

Michigan DHHS, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section (09/2012 to 12/2016)
Julie served as a section manager for Michigan DHHS, Michigan's single state Medicaid agency. She was responsible for making capitation payments for 1.8M Medicaid members with annual

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expenditures exceeding $8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Children's Special Health Care Services, Foster Care and MI Choice (HCBS) populations from fee-for-service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. She supervised professional staff, supporting state plan services, including 1915(b), 1115 waiver services, and other related healthcare programs, serving 1.8 million members with annual expenditures over $6 billion. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined and enforced standard operating procedures; and interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings, her team recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members that were over 135% federal poverty level (FPL). She interacted with the actuary team almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

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

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

She was responsible in loading and maintaining Michigan's Medicaid programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting and other federal compliance initiatives, consulting on policy, research and respond to auditor findings, and train new staff. She was also responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research, calculated preliminary and year-end accrual estimates. Julia served as the Department's key data analyst of the Michigan Adult Home Help (AHH) and Freedom to Work (FTW) Programs, and was instrumental in presenting information to the Governor's Long Term Care (LTC) Task Force, other advocate groups, and upper Department management on aging and care demographics, educating audiences holding down LTC costs. She

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assisted in forming, writing and implementing policy changes as well as responding to auditor findings. As the Data Analyst for FTW Program, she conducted studies involving demographic and expenditure information on enrollees as well as complete national annual reporting. This work led to an increase in the Medicaid Infrastructure Grant (MIG) awards from 2005, $500,000 original award to 2010's, $1.3 million award.

Julia was a key organizer and developer of annual budget slide presentation for the Medicaid Director to the Michigan Legislature and other outside organizations. Involved in presentations to Health Maintenance Organization (HMO) executives, Governor's LTC Task Force, advocate groups, as well as the Department's upper management.

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

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Shelly Schram, CAPM®

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

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

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.

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.

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– 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 main 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).

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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.

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Dorothy "Dot" Ball, MA

CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Dot Ball is a senior consultant with over 30 years of professional experience working in state and federal government, nonprofit and for-profit health services, healthcare policy, health information technology, medical business management, professional education, and online education technologies, and clinical and direct service healthcare business. She is an experienced public policy and business operations expert and regulatory analyst with subject matter expertise across a multitude of Healthcare Reform areas, including the Affordable care Act (ACA), Health Information Technology (HIT), and Health Information Exchange (HIE) technology and governance structures, Medicaid business process modeling, Medicaid Information Technology Architecture (MITA), regulatory compliance and quality, HIPAA, health professional workforce training and eLearning technologies. She participates in state and national healthcare transformation initiatives including health reform, Health Level 7 (HL7), MITA, National Health Information Network (NHIN), Electronic Health Record (EHR) Adoption, and HIE projects and workgroups.

EDUCATION AND CERTIFICATIONS

MA, Government, International Relations – Latin American Development, Public Policy Studies, and International Terrorism, New Mexico State University

BA, Government – Public Policy, Political Psychology, and International Relations, New Mexico State University

Lean Six Sigma Green Belt (LSSGB)

ESRI Geographic Information System (GIS) Technology Certification

Agency for Healthcare Research and Quality's (AHRQ) Knowledge Transfer (KT)/ Implementation program - State Healthcare Policy Program Certification.

State of Texas, Secondary Education Certification

AIDS Education and Training Centers Train the Trainer Educator Certification

PROJECT EXPERIENCE

BerryDunn (06/2009 to present)

– **West Virginia Department of Human Services (DoHS)**
Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification Project (10/2018 to present)
Dot currently serves as the project training lead and supports the Testing and Certification teams. She previously supported the Data Visioning and Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development, Data Governance Roadmap, and the Certification team for the Procurement Assistance Project.

People's Access to Help (PATH) Design, Development, and Implementation (DDI) Project Management (10/2021 to 02/2022)
Dot served as a business analyst supporting the development and rafting of the Bureau for Children and Families (BCF) Comprehensive Child Welfare Information Systems (CCWIS) Data Quality Plan (DQP) for the PATH project.

– **West Virginia Bureau for Medical Services (BMS)**
MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2012 to present)
Dot serves as a MITA subject matter expert (SME)/analyst providing support for State Self-Assessment design, data collection, business

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Centers for Disease Control (CDC) Public Health Advisor Certification

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

30 years

process modeling, analysis, MITA SS-A Report and Roadmap, HITECH MITA Assessment and Companion Report and Roadmap, design and development, Data Management Strategy (DMS) and Technical Management Strategy (TMS) design and development.

Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (10/2021 to 02/2023)
Dot served as a business analyst / SME supporting various project deliverables with research, analysis, deliverable design, and development of the Data Strategy Roadmap, MCO Contract Review Analysis, Best Practices Summary, EDQ Protocols Guide, and Data Quality Analysis.

Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 to 12/2020)
Dot served as business analyst / SME supporting the Deliverables Review team for the West Virginia Project Management Services.

Gap Analysis and Project Management Services (GAPMS) Project (11/2016 to 03/2018)
Dot served as Policy Analyst and ACA SME.

PPACA Planning, Analysis, and Implementation Support (05/2010 to 12/2013)
Dot served as a lead policy analyst.

State Medicaid Health IT Planning and Health Care Reform Consulting and EHR Incentive Payment Program (02/2010 to 10/2010)
Dot served as business analyst supporting the research, design, and development of the WV SMHP and EHR Provider Incentive Program Design Environmental Scan.

– **Puerto Rico Medicaid Program**
Enterprise Objective Monitoring and Control (EOMC) Services (08/2020 to 09/2021)
Dot served as MITA SME/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise Key Performance Indicators (KPI) Set/Guide.

– **Arizona Health Care Cost Containment System (AHCCCS)**
Testing Experience and Functional Tools (TEFT) Grant Project (07/2014 to 09/2014)
Dot served as business analyst/SME.

– **Massachusetts Executive Office of Health and Human Services (EOHHS)**
State Medicaid Health IT Planning and IAPD Development (10/2010 to 01/2011)
Dot served as business analyst.

POGIS Consulting LLC/Dorothy A Ball Consulting (06/2009 to present)
As principal consultant for this small veteran-owned analytics and subject matter consultancy, Dot focuses on providing services in the areas of health IT, healthcare delivery systems, and government-funded health and human services.

In addition, Dot has served as Lead Policy Analyst for Alabama's Medicaid Managed Care External Quality Review project; MITA SME for AHCCCS and State of New Mexico Human Services

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Department MITA 3.0 SS-A; State of New Mexico Human Services Department National Human Services Interoperability Architecture (NHSIA) assessment; Policy Manager as part of an IV&V team for Arizona's Health Insurance Exchange implementation (dates); and Policy Analyst for business intelligence projects in various states, including Arizona, Utah, New Mexico, Illinois, New Hampshire, Florida, Arkansas, and Texas.

Consulting roles and projects include:

- Lead Analyst: New Mexico MMIS Replacement Project – Medical Assistance Division (MAD) MITA State Self-Assessment (SS-A) and Child Support Enforcement NHSIA assessment prepared for the State of New Mexico Human Services Department (HSD)

- Policy Manager: Arizona Health Insurance Exchange (HIX) IV&V

- MITA SME/Business Analyst: AHCCCS MITA 2.0 and 3.0 SS-A

- Policy Analyst: Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application

- Lead Policy Analyst: WV BMS ACA Compliance and Implementation Project

- Lead Policy Analyst: Alabama Medicaid Managed Care External Quality Review (EQR) project

FourThought Group, Inc. (08/2002 to 05/2009)

As senior business analyst, Dot provided policy analysis, regulatory analysis, business process analysis, and change management for state health and human services agencies, including work on the following projects:

- Business Analyst for the AHCCCS MITA Analysis Project

- Performed business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, develops As-Is and To-Be Assessments, data collection surveys, documentation review, plans and facilitates validation sessions, performs quantitative and qualitative gap analysis and documentation, develops solutions transition and sequencing plan MITA strategic Road map

- Lead Business Analyst for AHCCCS Fee for Service Management Division (FSM) MITA Assessment

- Managed the MITA business analysis team

- Lead Business Analyst for AHCCCS and Department of Economic Security (DES)

- Worked to initiate Phase I of the State of Arizona Technology Interface Project System (TIPS)

- Lead Business Analyst managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third-Party Administrator Transition and System Implementation project

- Managed requirements development team

- Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS)

- Member of the HIPAA privacy policy compliance team completing assessments

- Lead Business Analyst Indiana MITA Analysis project

- Performed business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, developed As-Is and To-Be Assessments and web enabled documentation request surveys using Survey Monkey, planned and facilitated validation sessions, and documentation review, and developed solutions transition and a sequencing plan for the MITA strategic Road map

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- Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development and Implementation project
- Senior Policy Analyst for South Dakota HIPAA Security Policy and Procedures compliance project
- Performed policy and procedures gap analysis of existing Department and State Information Technology authority documentation
- Business Analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework; this was among the first MITA assessments performed
- Policy Analyst providing support to the CMS MITA Initiative Team
- Provided policy guidance for the development of MITA Business Model and MITA Assessment tools. She participated in MITA framework development workgroups and MITA MMIS reshaping efforts including HL7 Financial Management workgroup and was familiar with most aspects of the framework and technical specifications
- Business Analyst/SME for Washington State Medicaid MMIS procurement project

New Mexico Health Policy Commission (03/2000 to 08/2002)
As senior policy analyst, Dot was responsible for the management of state policy and planning projects addressing access to healthcare, including:

- Managing task force activities and studies, including Medicaid cost containment, prescription drug access, provider retention issues, workforce shortages, health professional regulation, and rural and immigrant access to healthcare
- Managing population survey and data analysis projects that resulted in significant legislative changes
- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues, managed care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues
- Analyzing and interpreting state and federal laws and regulations
- Analyzing healthcare legislation and providing technical support to the state legislature, governor, and the New Mexico delegation to the U.S. Congress
- Developing data collection tools and survey instruments
- Conducting comparative health data analysis
- Responding to legislative requests and mandates

Rio Bravo Therapy Services (08/1996 to 11/1999)
As development director, Dot managed agency development activities, including financial and program development, service delivery, business management budget, and board development activities for a full-service physical/occupational rehabilitation center.

Southwest AIDS Services (01/1992 to 04/1994)
Dot was responsible for overall agency management activities, including programs, boards, staff, and general operations for a full-service, multi-county nationally recognized AIDS support services organization.

New Mexico Department of Health (09/1989 to 01/1992)
As disease prevention specialist, Dot conducted state public health infectious disease surveillance activities, including epidemiological investigations, case management, and data analysis; clinical

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and disease management quality assurance policies and protocols; and border health policy studies for the New Mexico Legislature.

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Marvin "Ed" Crawford

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

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

EDUCATION AND CERTIFICATIONS

Certified HIPAA Professional, ECFirst

Certified Security Compliance Specialist, ECFirst

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

14.5 years

KEY QUALIFICATIONS

- 16 years of experience directly supporting a single state Medicaid agency, including providing HIT subject matter expertise and project management support

- Extensive experience analyzing relevant federal security guidelines outlining rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information (ePHI) in the context of enterprise system implementations, maintenance, and operations

- Deep knowledge of HIT-relevant federal security compliance frameworks, including National Institutes of Standards and Technology (NIST) and Minimum Acceptable Risk Standards for Exchanges (MARS-E)

PROJECT EXPERIENCE

BerryDunn (04/2019 to present)

– **West Virginia Department of Human Services (DoHS)**
Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (07/2021 to present)
As the systems security lead for the project, Ed provides oversight of privacy and security-related project workstreams. He assists in the development, update, and review processes for security and technical deliverables and helps review and establish documented compliance with system security requirements at the project, Agency, and federal level.

People's Access to Help (PATH) DDI Project Management (04/2019 to 09/2021)
Ed coordinated numerous reviews for 92 separate deliverables, managing intake of all documents

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from contract vendor, disseminating to internal reviewers, and compiling comments for posting back to Optum. He also administered accurate documentation and tracking of all deliverables to and from the vendor. He was responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation industry best practice processes and methodologies for consistency and traceability.

– **West Virginia Bureau for Medical Services (BMS)**
MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (04/2019 to 10/2021)
Ed maintained an Access database for the MITA project used for gathering and compiling data during the annual SS-A, helping to ensure that BMS consistently maintained compliance with its federal partners.

West Virginia Bureau for Medical Services (06/2010 to 04/2019)
As the HIPAA security officer, Ed provided management and operational support services to the state Medicaid agency which included, but was not limited to, IT security controls, system performance monitoring, project management, report administration, and stakeholder engagement. Areas of focus included research, analysis and management of comprehensive IT security policies and procedures for the Medicaid Enterprise (MMIS, DW/DSS and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

West Virginia Office of Technology (WVOT) (02/2009 to 06/2010)
Ed served as an IT client technician, providing project management, coordination, reporting, and operational support services for new and existing, IT implementation activities for the State Executive Domain. He provided senior level technical support services for designated agencies within the Executive Branch.

West Virginia Office of the Insurance Commissioner (09/2005 to 02/2009)
As primary HIPAA security officer, Ed was responsible for the creation, promulgation, implementation, management and reporting of projects, initiatives, policies, and procedures related to accessing the Workers Compensation Insurance System (WCIS) and ICOMP for federal, State and outside access users. He researched and analyzed relevant federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of epHI.

West Virginia Workers Compensation Commission (12/1999 to 09/2005)
Ed was the primary information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures related to the access to WCIS and ICOMP for federal, State and outside access users. He researched and analyzed relevant federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Division of Corrections (12/1995 to 12/1999)
As communications officer, Ed was also the primary designated information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures for IT environment at the Mount Olive Correctional Complex.

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Cate Poling

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

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).

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

General Project Manager

MEDICAID EXPERIENCE

3.5 years

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

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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 Project (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).

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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 frame 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/note-taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure, and administering ophthalmic medications to patients.

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

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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 and 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/note-taking. 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.

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Robert Morey,
MHR, CHCO, CPM

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

Master of Human Relations, University of Oklahoma

BA, Psychology, University of Oklahoma

Certified HIPAA Compliance Officer (CHCO)

Certified Public Manager (CPM)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

20 years

Robert Morey is a senior consultant in BerryDunn's State Government Consulting Group. Robert has over 26 years of experience working in various data governance positions, including program manager, data privacy/security, and enterprise data strategy with the Office of Management and Enterprise Services, Oklahoma Department of Health, Office of Juvenile Affairs and Department of Human Services. Robert is a National Accreditation Auditor and Certified HIPAA Compliance Officer, with demonstrated success in reviewing organizational operations, providing data driven outcomes, and developing IT programs.

PROJECT EXPERIENCE

BerryDunn (06/2022 to present)

– **Oregon Health Authority (OHA) and Oregon Department of Human Services (ODHS)**

Data Governance Initiative (04/2024 to present)

Robert is serving as a data governance subject matter expert (SME) for the Data Governance Initiative project to support the development of an enterprise data governance program, data governance framework, data governance operation model, staff capabilities assessment, data governance literacy training plan, data governance policy development, and data governance maturity process.

– **West Virginia Department of Human Services (DoHS)**

Enterprise Data Services and Data Source Program (01/2024 to present)

As a technical SME, Robert concentrates on data governance for this large initiative and serves on the DoHS Data Governance Team as an integration point between program data services and enterprise data services. Robert continues to work on an enterprise data governance program to support the State's new organizational structure.

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

Enterprise Data Warehouse (EDW)/Business Intelligence (BI) Project (09/2023 to present)

Robert is serving as a SME / data analyst for the PRMP EDW/BI project to support the development of advanced data governance activities, data architecture, and data quality.

Enterprise Data Governance Project (08/2023 to present)

Robert is serving as a SME for the PRMP data governance foundational development and roadmap develop project. Key activities include developing a data governance operation model, framework, and roadmap.

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

Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (05/2022 to 01/2024)

Robert served as the data governance subproject lead for the Puerto Rico data governance foundational development, which included the following activities: developing a data governance roadmap, establishing a data governance steering committee, creating a data governance guide document for regulatory and compliance requirements, developing a data governance maturity assessment matrix and a data quality framework, and supporting the establishment of key data policies/standards.

– **Oklahoma Department of Human Services (OKDHS)**

Technology Business Management Division Organization Structure Review (07/2023 to 12/2023)

Robert served as a SME for this project. Key activities included gathering information through a web survey and discovery sessions, conducting an environmental scan, analyzing results, and documenting findings, and developing recommendations for the Technology Business Management Division organization structure.

– **Alaska Department of Health (DOH) and Department of Family and Community Services (DFCS)**

IT Services (ITS) Security Policy Review (07/2023 to 10/2023)

Robert served as a subproject lead for the engagement. Key activities included reviewing all DOH ITS security policies, developing a gap analysis report, identifying applicable federal and state statutes, and developing a best practice crosswalk for HIPAA, NIST CSF 2.0, NIST SP 800-53, NIST PF, and SOC. Key deliverables included DOH ITS security policy review framework, policy templates, and an enterprise policy tracking workbook.

IT Governance Needs Assessment and Roadmap Development (08/2022 to 07/2023)

Robert served as a SME for the Alaska IT Governance project. Key activities included providing team support, participating in discovery sessions and peer state interviews, and supporting the development of a needs assessment and IT governance roadmap.

– **Washington Health Care Authority (HCA)**

Institutions of Mental Disease (IMD) Waiter HIT Implementation Requirements Strategic Planning (05/2023 to 08/2023)

Robert served as a SME for the HCA IMD Waiver HIT implementation requirements strategic planning project. Key activities included research of background documentation, developing project information requests, information gathering through visioning and discovery sessions, and developing an IMD Waiver HIT Requirements Strategic Plan and Roadmap.

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– **Alaska DOH and Division of Public Health (DPH)**

Data Modernization and Informatics Initiative Strategic Planning (09/2022 to 08/2023)

Robert served as a SME for the DOH and DPH data modernization and informatics strategic planning project. Key activities included leading discovery sessions and peer state interviews and the research of data governance frameworks. Supporting information gathering through web surveys, and developing a data modernization plan, workforce development plan, and informatics strategic plan.

– **Mississippi Department of Human Services (MDHS)**

Legacy Systems Assessment Request for Proposal (RFP) Development (08/2022 to 10/2022)

Robert served as a SME in the development of RFP for DDI and DDI-SI services. Activities included the development of the delivery expectation document (DED), and support for development of a regulatory interface and technical/functional requirements.

– **West Virginia Bureau of Public Health (BPH)**

Data Modernization Initiative Plan (06/2022 to 09/2022)

Robert served as a SME on the development of the Data Modernization Initiative Plan. Key activities included supporting the development of a shared DG structure for the BPH and Office of Management Information Services.

Oklahoma Office of Management and Enterprise Services (OMES) (08/2020 to 06/2022)

Robert worked as the data strategy and governance manager to supervise the Enterprise Data Governance and State Data Strategy programs for OMES. OMES oversees the data governance for all Oklahoma state agencies including the Oklahoma single state Medicaid agency, the Oklahoma Healthcare Authority (OHCA). The department operations included managing the data governance program, master and meta-data management, data quality, data architecture, and establishing the enterprise data strategy. He worked on the Google Cloud Platform as a DASH platform administrator, responsible for implementation of state data strategy including enterprise data sharing, state universal ID, and master data management solution for health data (i.e., Medicaid data). Robert's responsibilities included supporting the maturity of the data governance program for all departments and agencies (i.e., Medicaid, Medicare, IT security and federal compliance departments).

Key responsibilities and projects that supported Medicaid include:

– **State Data Governance Program Lead**

OMES, as established by Oklahoma statue, is responsible for all IT services including IT systems, strategy, and standards. OMES functioned as the central support for all agencies around enterprise data strategies and data governance. As data governance program lead, Robert provided program support to OHCA around data governance assessment, planning, building, and maturing.

– **Data Sharing Hub (DASH)**

The hub and spoke project provided a cloud-based centralized data sharing platform to support OHCA sharing and use of data from other state agencies. This would allow data analytics, master data management, demographic registry, universal ID, program performance reviews, legislative and agency executive level dashboards, and key health research projects. DASH included all agencies but primarily focused on starting with the following agencies: ODHS, Oklahoma Department of Education, Oklahoma Department of Human Services, OHCA, Oklahoma Department of Mental Health, TSET, and Oklahoma Department of Public Safety.

– **Early Childhood Integrated DATA System (ECIDS)**

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Project outlined and supported centralized data sharing hub between ODHS, Oklahoma Department of Education, Oklahoma Department of Human Services, OHCA, and Oklahoma Department of Mental Health.

– EDS Support Project

Oklahoma Statute changed to make OMES-EDS responsible for all IT/data related services for state agencies (including OHCA).

– Data Classification Project

OMES-EDS initiated work on establishing data classification standard and documented data systems / data elements for all key agencies including key health and human service agencies (OHA, ODHS, OSDE, and OSDH).

– Data Security Disaster Recovery (DR) and Prioritization

The project worked with OHCA to list and prioritized for DR all applications and key data sets.

Oklahoma State Department of Health (10/2016 to 08/2020)

– Interim Director of Informatics (03/2020 to 08/2020)

Robert served as interim Director of Informatics to provide oversight and supervision of department staff and operations including master person index, Health e-Oklahoma, DG program, HIPAA privacy and security, interoperability, and interagency data agreements. He reviewed and approved all hardware, software, and network infrastructure purchases and served as Chair for the ITOC to review and track all IT projects/ enhancements. He worked on many data systems and projects that addressed Medicaid and healthcare data, helping ensure compliance with state and federal CMS standards.

– HIPAA Privacy and Security Program Manager (10/2016 to 03/2020)

Robert served as enterprise privacy and security consultant, responsible for the data governance program, data use review committee, data classification, and risk assessments. The OSDH and OHCA are within the Oklahoma Health and Health and Human Services Cabinet. Robert conducted audits and risk assessments of security and privacy practices to help ensure compliance with national standards. Robert was responsible for initiating, facilitating, and promoting activities to foster privacy and security awareness within the organization. He also functioned as liaison to Oklahoma State Board of Health, IRB, County health departments, state and federal data partners (i.e., HHS, CMS, OHCA), and community partners regarding privacy/ security incidents and compliance activities. Robert worked with the OHCA to gain Medicaid program requirements and help secure funding from the Centers for Medicare & Medicaid Services (CMS). He reviewed and approved all business associate agreements, data use agreements, and data sharing agreements. Robert was responsible for Office of Civil Rights complaints, federal investigations and OSDH responses to privacy and security incidents.

Key Projects that supported OHCA include:

– Health Information Exchange (HIE)

ODHS Informatics Department led the agency supported by direct CMS funding, reviews, and standards to implement Oklahoma's HIE.

– Health e-Oklahoma

ODHS Informatics Department lead the Health e-Oklahoma program to support centralized collection of health data across healthcare systems. Focused on population health outcomes, identifying underserved populations, health program performance outcomes.

– Oklahoma Health and Human Services Cabinet's Deliver Interoperable Solution Components Utilizing Shared Services Committee (DISCUSS)

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Established enterprise data standards and managing data projects across the health and humans service cabinets. DISCUSS spun off multiple sub-committees and projects to address complex data management issues including DISCUSS data subcommittee, data governance, multi-agency data sharing agreement, data quality, data security, research and funding solutions.

– OHCA Inter-agency Data Sharing

Robert served as chair and manager for the ODHS IRB/data use review committee. Primarily responsible for review of all intra/inter agency data sharing projects including (initial-review, approval, status, deletion). Over four years, EDS sponsored multiple data sharing projects between ODHS and OHCA.

– Oklahoma Front Porch Initiative

This initiative supported county health department employees' ability to meet and process Medicaid applications for any client that arrived at a county health department.

– ECIDS

Project outlined and supported centralized data sharing hub between ODHS, Oklahoma Department of Education, Oklahoma Department of Human Services, OHCA, Oklahoma Department of Mental Health and tribal healthcare.

Oklahoma Office of Juvenile Affairs (10/2002 to 07/2016)

– Director (12/2012 to 07/2016)

Robert served as Director of the Institutional Services Division (ISD), responsible for division contracts, budgeting/procurement process, state and federal grants, and other funding streams. He established and maintained agency and facility rules and procedures while supervising employee related activities such as recruitment, retention, training, discipline, and performance management processes. He acted as chief spokesperson and advocate to the legislature, community and corporate partners, Board of Juvenile Affairs, municipalities, stakeholders, educators, and public. He developed and implemented incident reporting system data management system to collect, validate, analyze, and report all incidents.

– Support Services Operations Supervisor (09/2007 to 12/2012)

Robert was the state coordinator for American Correctional Association (ACA), Performance-based Standards (PbS) and HIPAA privacy and security. He lead several enterprise data projects and multi-agency data initiatives. He supervised four program managers, oversaw activities in nine agency programs, including: OJA administrative rules and agency policy/procedure, worker's comp program, risk and safety management, inventory management, support services procurement, fleet management, and agency communication services.

– Privacy and Security Program Manager/Policy Supervisor (10/2002 to 09/2007)

Robert was responsible for the agency HIPAA privacy and IT security programs. He established security and privacy risk assessments to help ensure full compliance with state and federal standards. He served on the health and human services multi-agency data steering committee. He developed and maintained all OJA administrative rules, policy, and procedures, and ensured compliance with APA, state, and federal laws. Robert also performed annual ACA audits on juvenile institutions and field offices and oversaw the institutional policy taskforce and community services division policy taskforce regarding legislative directives.

b BerryDunn

Jeffrey "Jeff" Stoddard, Prosci® CCP

SENIOR MANAGER
Berry, Dunn, McNeil & Parker, LLC

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

EDUCATION AND CERTIFICATIONS

BS, Management of Information Systems, University of Vermont

Prosci® Certified Change Practitioner

Health Leadership Development Program, Daniel Hanley Center for Health Leadership

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

KEY QUALIFICATIONS

- 20+ years' experience leading complex healthcare systems development teams and initiatives

- 20+ years' experience designing data management systems and reporting architecture to support big data initiatives

- Experience leading state data improvement and encounter data quality initiatives

- Experience leading state usability and evaluation of Medicaid Management Information Systems (MMIS) and Data Warehouse/Decision Support Systems

PROJECT EXPERIENCE

BerryDunn (12/2019 to present)
As a senior manager specializing in data management and strategy, Jeff works with state healthcare agencies, nonprofit and commercial healthcare organizations to assist in system, data, and analytic projects to achieve program objectives related to improving healthcare outcomes and reducing costs.

– Minnesota Department of Public Safety Driver and Vehicle Services (DVS)
Data Analysis Project (01/2025 to present)
Jeff provides project leadership to support the State in identifying improvements for operational metric reporting.

Financial Analysis Project (08/2024 to present)
Jeff provides data ingestion and analysis subject matter expertise to assist the State in analyzing their FAST vehicle services data.

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– Portland Public Schools, ME
Data Reconciliation Project (11/2024 to present)
Jeff is providing technical leadership to assist the school district with reconciling data between internal systems.

– U.S. Virgin Islands (USVI) Department of Human Services
Universal Data Warehouse Project (10/2024 to present)
Jeff serves as a subject matter expert (SME) for USVI's Medicaid agency, the Department of Human Services. Jeff provides Centers for Medicare & Medicaid Services (CMS) core measure set and date warehouse subject matter expertise and support to the USVI.

– Missouri Department of Labor and Industrial Relations
Tips and Complaints Portal (08/2024 to present)
Jeff provides technical leadership and analysis to assist the State with identifying operational metrics and dashboards to implement with their future tips and complaints portal system.

– Iowa Department of Health and Human Services
Quality Management System (08/2024 to present)
Jeff serves as a SME for Iowa's single state Medicaid agency, the Department of Health and Human Services. Jeff offers subject matter expertise in systems design and analysis to aid the State in developing a quality management system utilizing their Microsoft SQL Server environment. The project encompasses the creation of long-term services and support (LTSS) measures and dashboards to inform program quality initiatives, as well as the data ingestion and data warehousing components necessary to support these measures and dashboards.

– West Virginia Bureau for Medical Services (BMS)
System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
Jeff provides technical leadership and support to assist the state in maturing their SDLC processes to improve operational efficiencies including the implementation of an Atlassian Jira® system.

Data Integration Hub (6/2024 to 11/2024)
Jeff provided technical leadership, cloud infrastructure design, system design, and analysis to assist the State in developing a system's integration proof of concept. The project included deploying a secure Amazon Web Services (AWS) cloud infrastructure with single-sign-on (SSO) capabilities, securing the environment based on NIST 800-53 controls, and building data pipelines to exchange data between Medicaid data vendors.

Data Improvement Project (12/2019 to 06/2024)
Jeff provided technical leadership and analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to 03/2022)
Jeff provided technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

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

– West Virginia Department of Human Services (DoHS)
Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (06/2020 to present)
Jeff provides subject matter expertise and architectural support to assist the State in developing a long-term Medicaid enterprise strategy and request for proposal to support the strategy.

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Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification (06/2020 to present)
Jeff provides subject matter expertise and analytic support to assist the State in implementing their multi-source data warehouse solution.

– New Jersey Department of Human Services
MMIS Modernization (11/2023 to present)
Jeff serves as a SME for New Jersey's single state Medicaid agency, the Department of Human Services Jeff provides technical leadership, analysis, and support to assist the state with the implementation and operation of a Tableau dashboard system to report on MMIS operational metrics. The system utilizes automated AWS data pipelines, Snowflake, and Tableau.

– Puerto Rico Medicaid Program (PRMP)
Enterprise Data Warehouse (EDW) Business Intelligence (BI) Project (09/2023 to present)
Jeff serves as a SME for Puerto Rico's Medicaid program, PRMP. Jeff provides subject matter expertise and support to assist Puerto Rico in implementing their multi-source data warehouse solution.

– New Mexico Finance Authority (NMFA)
Document and Data Management Consulting Services (10/2023 to 06/2024)
Jeff provided data management and data governance subject matter expertise to support the NMFA in developing data classification policies and procedures and providing recommendations for improving their data management practices.

– Beacon Health/Northern Light Health
Data Analytics Project (04/2020 to 12/2023)
Jeff provided technical leadership and project management services to support the Beacon Health Accountable Care Organization (ACO) with decision support reports to provide operational and program evaluation insights.

Onpoint Health Data (08/2013 to 07/2019)
As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including systems development, infrastructure, and data security.

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

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

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

b BerryDunn

Arcadia Solutions (04/2012 to 07/2013)

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

Health Dialog (09/2004 to 04/2012)

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

b BerryDunn

Charles T. "Tom" Hunter, ITIL(F)

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Tom Hunter is a senior consultant in BerryDunn's Government Consulting Group. He has 30+ years of experience as a database analyst (DBA), system designer, computer programmer, analyst, project manager, and trainer in the healthcare and natural gas industries. Tom has strong analytical skills combined with experience in object-oriented programming techniques, database design, and legacy programming languages. He is a team leader competent in complete project cycles, testing, final implementation, and documentation with excellent communication skills.

EDUCATION AND CERTIFICATIONS

80 Credit Hours in Pascal Programming Language, C++ Programming Language, and Accounting, Morris Harvey College and West Virginia University

IBM® Course Work: Telecommunications, Programming, and NT administration and taken technical classes through Computer Associates and New Horizons Computer Learning Center

Information Technology Infrastructure Library (ITIL) Foundation Certification

Microsoft SharePoint 2010

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

13 years

KEY QUALIFICATIONS

- 13+ years of experience with Medicaid and Medicaid Management Information Systems (MMIS) projects
- 15+ years of experience in managing IT data centers
- 15+ years of experience in designing IT systems and programming to include Visual Basic and RPG computer languages
- Microsoft Access Database Architect and Programmer
- Subject matter expert (SME) and lead tester for West Virginia's People's Access To Help (PATH) Medicaid system Implementation
- JIRA® Tracking Software Administrator and support

PROJECT EXPERIENCE

BerryDunn (07/2011 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 Assistance Project (06/2016 to present)
Tom joined the MITA project as a business analyst providing database experience and expertise to complete an Access database to store and report business process capability maturity levels for the 2016 SS-A. The project involved restructuring and importing several MS Excel spreadsheets from the 2014 assessment into the database along with validating the results of the imports. "Scorecard" reports to submit the data to the Centers for Medicare & Medicaid Services (CMS) were designed and created along with data entry forms to also record the information through a graphical user interface. Tom is the Administrator of the MITA Database and provides guidance and support to database users.

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Project Management of MMIS Procurement, Design, Development, and Implementation (DDI), and Certification (05/2014 to 05/2016)

Tom joined the MMIS project in May 2014 as a SME for the provider enrollment sub-system leading the deliverable review effort of several provider documents for the new system. He also was the lead User Acceptance Testing (UAT) tester of the Provider's On-line Portal for Provider Enrollment, providing valuable input to the vendor for defect resolution and enhancements.

Provider Enrollment Application (PEA) Project (08/2013 to 05/2014)

Tom was the lead project manager for this project assisting BMS with weekly status meeting facilitation and reporting. He was the lead UAT tester for BerryDunn, coordinating the BMS resources to provide accurate and prompt testing results on the PEA project. In addition, Tom has critiqued several desk level procedures from BMS' fiscal agent and offered many updates resulting in improvements to their documentation.

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

Tom participated on the Medicaid 5010 Refresh Project as a lead tester and support analyst assisting BMS in several ways. He wrote user documentation for the BMS testers, created MS Excel spreadsheets and SharePoint lists to facilitate defect reporting, and managed the day-to-day UAT efforts at the fiscal agent's office for BMS. He participated in daily triage meetings during UAT and provided valuable assistance with his background in medical claims billing and processing.

Data Warehouse / Decision Support System (DW/DSS) Project Management (07/2011 to 10/2011)

Tom worked on the DW/DSS project after joining BerryDunn in July 2011. His initial duties were meeting facilitation and deliverable reviews. His background provided much-needed expertise with the numerous technical documents that were presented as part of the early stages of the project.

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

Organizational and Business Process Redesign (04/2022 to present)

Tom began working with the Hawai'i Department of Human Services, Hawai'i's State Medicaid Agency, in April 2022 to assist with UAT planning and writing UAT scripts for various software releases. In October of 2022, he was tasked with locating an issue tracking product and was instrumental in selecting the Jira® application. He has implemented the software for Hawai'i and is the main administrator and maintains the system daily. His other duties include reviewing design specification documents (DSDs), business requirements, software release notes, release planning, and UAT support.

R.L. Laughlin & Co., Inc. (12/2002 to 07/2011)

As an IT DBA, analyst, and programmer for this West Virginia-based natural gas measurement and field services company, Tom provided programming, database design/administration, and system design functions on a variety of platforms and programming languages. He administered MS SQL databases, including transactional replication of production database to off-site backup server; wrote, tested, and debugged ad hoc queries, user-defined functions, and stored procedures; created and maintained tables, including indexes and triggers; developed program specifications and documentation; developed and maintained operational procedures. He has written programs to provide custom file formats and reports; migrated software to a client-server platform; provided new software development and support; and managed teams of software development subcontractors.

Charleston Area Medical Center (CAMC) (09/1992 to 12/2002)

As Director of IT from 1992 to 2002, Tom managed the 200+ server data center at CAMC, which had 15 staff and operated 24/7. He also managed the Network and PBX departments (staff of 25) and help desk (staff of 12) during various periods. He participated in IT project management at the department level, attended Six Sigma training sessions, and facilitated management development

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classes. He was a member of a focus group comprised of hospital managers/employees, physicians, and community members tasked with creating a Health Maintenance Organization (HMO) chartered by CAMC, which became Carelink.

Strategic Ventures, Inc. (SVI) (08/1987 to 09/1992)

As Director of IT, Tom planned and implemented the consolidation of the SVI data center into the CAMC's data center; managed a medical billing department of 15 employees and an IT staff of four, providing IT services to seven corporate entities. In addition, he migrated an IBM® System 36 computer to an IBM® AS/400 system; wrote and maintained RPG programs on AS/400; and planned and implemented the installation of an HP computer to provide computer services to Carelink HMO.

b BerryDunn

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 (GIODN) 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.

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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

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coordinating events for the IT sector.

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Samuel "Sam" 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.

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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.

b BerryDunn

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.

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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.

b BerryDunn

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.

b BerryDunn

– 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

b BerryDunn

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.

b BerryDunn

AnnaBella Hyre

CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

AnnaBella Hyre is an emerging consultant with experience and continued interest in partnering with Medicaid agencies to support them in fulfilling policy goals, especially related to waiver programs. As a Political Science and Public Administration major, AnnaBella developed a deep knowledge of state and local government policies and business processes, allowing her to bring a broad and unique perspective to the projects she now engages with and supports. AnnaBella is well versed in business communication strategies and relationship management, working closely with state agencies to help align project and initiative expectations and strategies with research-supported results.

EDUCATION AND CERTIFICATIONS

BBA, Marketing, Marshall University

BLA, Political Science, Marshall University

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 year

PROJECT EXPERIENCE

BerryDunn (06/2023 to 08/2023; 07/2024 to present)

– **West Virginia Bureau for Medical Services (BMS)**
State Plan Review and Support (SPRS) Project (11/2024 to present)
In support of development of State Plan Amendments (SPA), AnnaBella assists with the creation of SPA package materials, project management tasks including tracking of key action items and decisions, and research analysis in support of current and developing SPAs.

Organizational Development Project Phase II (07/2024 to present)
As project coordinator, AnnaBella assists with day-to-day project management tasks such as scheduling, client communication, and updating organizational repositories such as the decision log and action items lists.

Technical Assistance and Project Support (TAPS) Project (07/2024 to present)
On a monthly basis, AnnaBella creates a Federal Guidance Tracker consolidating and summarizing all guidance released by Centers for Medicare & Medicaid Services (CMS). As needed, AnnaBella also assists in the development of research and impact summaries of guidance to inform and assist the State in remaining compliant at the federal level.

b BerryDunn

Substance Use Disorder (SUD) Waiver Initiative Project (06/2023 to 08/2023; 07/2024 to present)
As a research analyst supporting the SUD project, AnnaBella provides research support on a range of topics aligned with the planning for BMS's 1115 waiver renewal and implementation. Responsibilities include surveying other approved or pending 1115 waivers for SUD populations and investigating provider and member outreach and engagement strategies. AnnaBella also assists in the development of Quarterly SUD Monitoring Reports as well as the creation of new Monitoring Protocol for the waiver demonstration renewal.

ARPA Section 9817: HCBS Implementation Project (06/2023 to 08/2023)
Supporting the initiatives under ARPA HCBS, AnnaBella assists with project management tasks, including tracking key decisions and updating organizational repositories such as the decision log and action items lists to help ensure project documentation is updated.

County Commissioners Association of West Virginia (05/2021 to 09/2021)
AnnaBella was an intern and worked as a staff assistant tasked with the responsibility of researching and analyzing pieces of State legislation. She routinely communicated with elected officials and utilized Microsoft Office products on daily projects.

b BerryDunn

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.

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.

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

b BerryDunn

– 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.

b BerryDunn

Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC

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.

EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years

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.

b BerryDunn

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.

b BerryDunn

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.

b BerryDunn

– 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

b BerryDunn

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

b BerryDunn

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.

b BerryDunn

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 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 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.

b BerryDunn

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.

b BerryDunn

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.

b BerryDunn

Megan Hamilton, MA

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC

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

PROJECT EXPERIENCE

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

BerryDunn (12/2022 to present)

Megan works within 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.

b BerryDunn

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.**

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 also 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 and led prospective students through the admissions process and provided exemplary customer service to meet admissions percentage goals. She completed data entry tasks, such as the entering of standardized testing scores, as well as the organization of student admission packets. KD supported senior admissions employees by completing office tasks such as printing, copying, and filing, and built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.

EDUCATION AND CERTIFICATIONS

BA, Linguistics, University of Texas at Arlington

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

3 years

b BerryDunn

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

RELEVANT 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.

b BerryDunn

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.

b BerryDunn

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	OAPD-U and PAPD	The OAPD-U and PAPD will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610.

b BerryDunn

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
ACA	Affordable Care Act
APD	Advance Planning Document
ARC AMPE	Acceptable Risk Controls for ACA, Medicaid, and Provider Entities
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CFR	Code of Federal Regulations
CR	Change Request
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EDS	Enterprise Data Solution
EM	Engagement Manager
GPM	General Project Manager
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MATCH	Mountain State Assessment of Trends in Community Health
MDM	Master Data Management
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
OAPD-U	Operational Advance Planning Document Update
PAPD	Planning Advance Planning Document
POA&M	Plan of Action & Milestones
PM	Project Management
RAF	Risk Acceptance Form
RFP	Request for Proposals
RTM	Requirements Traceability Matrix
SOW	Scope of Work

b BerryDunn

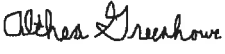| Acronym/Abbreviation	Definition
SS	Support Staff
SSPP	System Security and Privacy Plan
State, WV	West Virginia
WVHIN	West Virginia Health Information Network

HUMAN SERVICES

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

Alex J.Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

DATE: June 6, 2025

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

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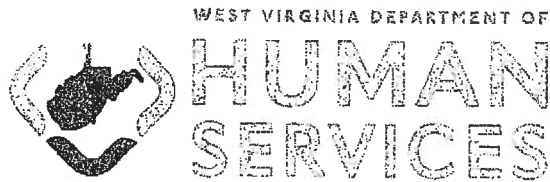   Office of Shared Administration/Purchasing

RE: PF1714135, CDO BMS25*54
           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 Medicaid Enterprise Data Solution Project Management Support Services Phase VI. The service period 06/15/2025-06/14/2026. The total estimated cost is $383,800.00.

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

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

Alex J.Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

Date: June 6, 2025

To: Office Shared Administration/Finance

From: Jimmy Dowden, WVPBC
Director
BMS, Procurement Services

Re: PF1714135, CDO BMS25*54
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 is SFY26 and Month 12-13 in SFY27, per the table below:

CDO BMS25*54
EDS Ph VI

06/15/2025-04/30/2026		05/01/2026-06/14/2026	
PR05-2026	Payment	PR07 - 2027	Payment
Lead Project Manager hours @ $215	$9,460.00	Lead Project Manager hours @ $215	$1,720.00
Engagement Manager hours @ $270	$8,370.00	Engagement Manager hours @ $270	$1,350.00
Lead MMIS Project Manager 20 hours @ $205	$8,815.00	Lead MMIS Project Manager 4 hours @ $205	$1,435.00
General Project Manager hours @ $190	$284,430.00	General Project Manager hours @ $190	$29,260.00
Project Management Support Staff hours @ $80	$32,880.00	Project Management Support Staff hours @ $80	$6,080.00
	$343,955.00		$39,845.00
		Grand Total:	$383,800.00

Page 2

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.

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

Rosen, Bryan D <bryan.d.rosen@wv.gov>   Thu, Jan 23,
to Wagner, Roberta A, Price, Robert L

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

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 hav today.

Bryan

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Simple Search	Search Editor

◯ Any Words ⓘ
◯ All Words ⓘ
◯ Exact Phrase ⓘ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"	✕

Entity ⌄

Location ⌄

Status ⌃

☑ Active

☐ Inactive

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(Entity Information ⌃) | ‹ (All Entity Information) (Entities) (Disaster Response Registry) (Responsibility / Qu ›

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West Virginia Secretary of State — Online Data Services

Business and Licensing

Online Data Services Help

Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information

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

Organization Information

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

Addresses

Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	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
2015
2014
2013
2012
2011
2010
2009
Date filed

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

Wednesday, June 11, 2025 — 8:07 AM

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